

FOR PROFESSIONAL INVESTORS - 11/09/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

EDGED HIGHER

JCI advanced and closed at 6,670 (+38 points or +0.57%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR - 1.4Tn today and rupiah slightly strengthened to IDR 14,243/USD.

Banking stocks were mixed as BBKA (+1.32%), BBRI (+0.47%), and MEGA (+3.35%) advanced, while BBTN (-1.39%) and BMRI (-1.79%) weakened. Consumer names were mixed as INDF (+1.2%) and ICBP (+0.28%) rose, while GGRM (-0.61%), MYOR (-0.82%), and UNVR (-0.67%) retreated. Cement stocks were positive as INTG (+2.42%), SMGR (+0.78%), SMBR (+1.32%), and SMCB (+0.29%) all closed higher. Construction names were positive as WIKA (+1.56%), ADHI (+3.7%), PTPP (+1.65%), and WSKT (+0.55%) all in green. Other movers were TMAA (+24.62%), DSSA (+20%), BBKP (-6.79%), and POLL (-6.33%).

OJK assesses that the economy is starting to improve as reflected in the outstanding loan disbursement of IDR 5,652.8tn as of September 2021, an increase of 2.21% YoY. Credit is estimated to grow 6-7% YoY for 2022, higher than this year in the range of 3-4%.

BOND MARKET

LITTLE CHANGE

Indonesia bond market closed with little change today. The morning session opened with mini rally with local and onshore foreign banks as the main buyer. The appetite remained focus on front to 10Y area as well as long end series. 10Y FR87 got taken to 102.5 (6.14%) while 5Y FR86 got traded to as high as 101.83 (5.03%). In the second session, the gains were capped as profit takers emerged. At the end of the day, yield curve close mixed with 5Y/10Y/15Y/20Y benchmark closed the day at mid yield of 5.04%/6.14%/6.21%/6.86%

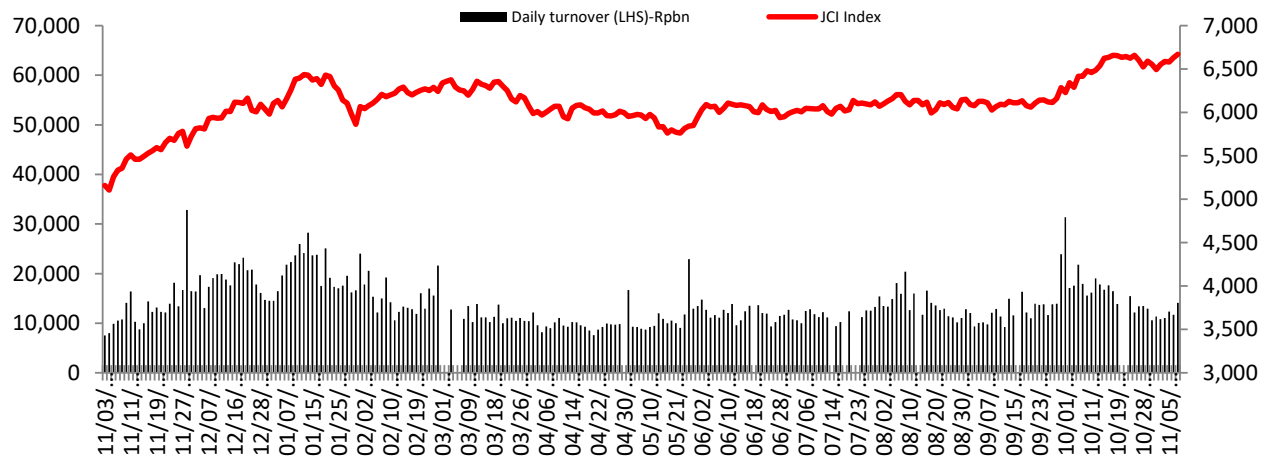


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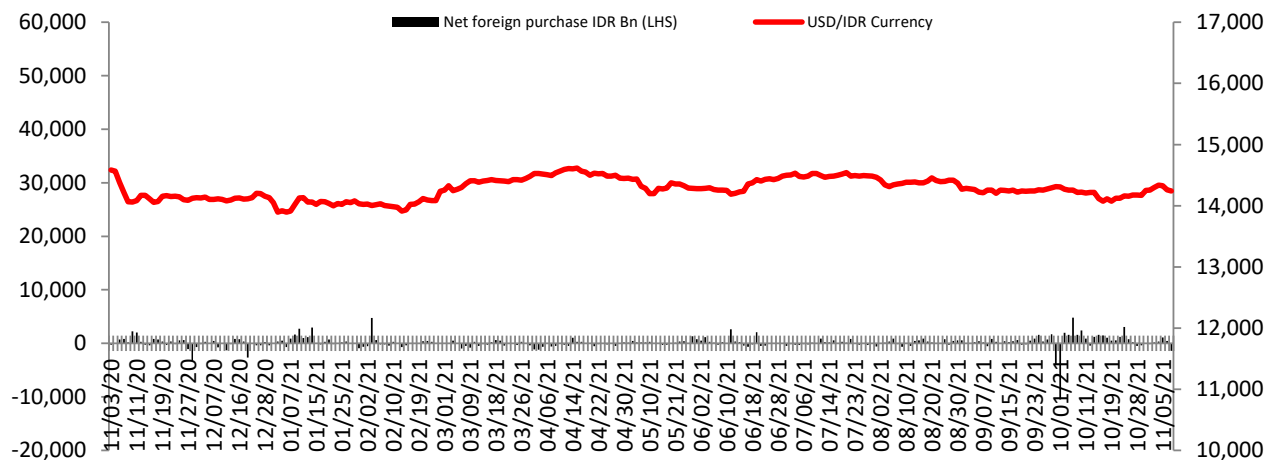
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GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	101.8	0.0	0.1	5Y
FR82	FR0082 Govt	102.4	0.0	(2.2)	10Y
FR80	FR0080 Govt	100.3	(0.0)		15Y
FR83	FR0083 Govt	106.4	0.1	(3.9)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,669.9	0.6	11.6	
Thailand	SET Index	1,631.7	0.3	12.6	
Korean Stock Exch.	KOSPI Index	2,962.5	0.1	3.1	
Straight Times	FSSTI Index	3,243.4	(0.6)	14.1	
Kuala Lumpur	KLCI Index	1,524.0	(0.7)	(6.3)	
Philippines	PCOMP Index	7,441.7	0.6	4.2	
Nikkei	NKY Index	29,285.5	(0.8)	6.7	
Hang Seng	HSI Index	24,813.1	0.2	(8.9)	
MSCI-Asia pacific	MXAP Index	198.8	0.1	(0.6)	
<u>Global Indices</u>					
Dow Jones	INDU Index	36,432.2	0.3	19.0	
S&P 500	SPX Index	4,701.7	0.1	25.2	
Nasdaq	CCMP Index	15,982.4	0.1	24.0	
FTSE 100	UKX Index	7,313.7	0.2	13.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,243.0	0.1	(1.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,258.5	(0.7)	1.2
3 month	IDSWT3M Index	14,264.1	(0.7)	(1.2)
6 month	IDSWT6M Index	14,263.8	(0.9)	(1.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,320.0	(0.6)	(1.1)
6 month	IDFWT6M Index	14,428.0	(0.7)	(0.1)

*price as of 11/8/2021


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