



FOR PROFESSIONAL INVESTORS - 11/01/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

DOWN

JCI weakened and closed at 6,553 (-38 points or -0.58%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 89Bn today and rupiah weakened to IDR 14,248/USD.

Banking stocks were negative as BDMN (-3.72%), BBNI (-2.14%), BBRI (-0.47%), MEGA (-5.46%), and BBKA (-1%) all declined. Consumer names were mixed as GGRM (+0.67%) and MYOR (+0.43%) inched higher, while KLBF (-0.63%), INDF (-1.18%), and HMSP (-0.97%) corrected. Infra stocks were negative as JSMR (-1.9%), PGAS (-1.99%), TOWR (-1.29%), and TBIG (-4.08%) all retreated. Telco names were mixed as ISAT (+5.78%) and FREN (+3.7%) advanced, while TLKM (-2.63%) retreated. Other movers were ANJT (+18.93%), INPP (+12.93%), BINA (-4.53%), and BTPS (-3.67%).

BI projects the value of e-commerce transactions to increase to Rp406tn, growing 52.6% YoY. The original projection was only Rp395tn. Meanwhile, digital banking transactions throughout this year are also projected to increase to Rp39,130tn or up 43% YoY.

BOND MARKET

SLIGHTLY LOWER

Indonesia bond market start the week weaker with wide spread today. Bond prices went down slightly in the morning session as Rupiah weakening to above 14,200 level. We heard some onshore and offshore players were on selling mode while onshore name on the buy side. Overall sentiment remains cautious ahead of FOMC meeting this week. From our side, we only heard 10Y FR87 was traded repeatedly at 6.23%. Rupiah closed at 14,275 in the spot market. Tomorrow on November 02 MoF will hold regular Sukuk auction of 6M SPNS, 3Y PBS-031, 5Y PBS-032, 13Y PBS-029, and 25Y PBS-028 with indicative target of IDR 4Tn.

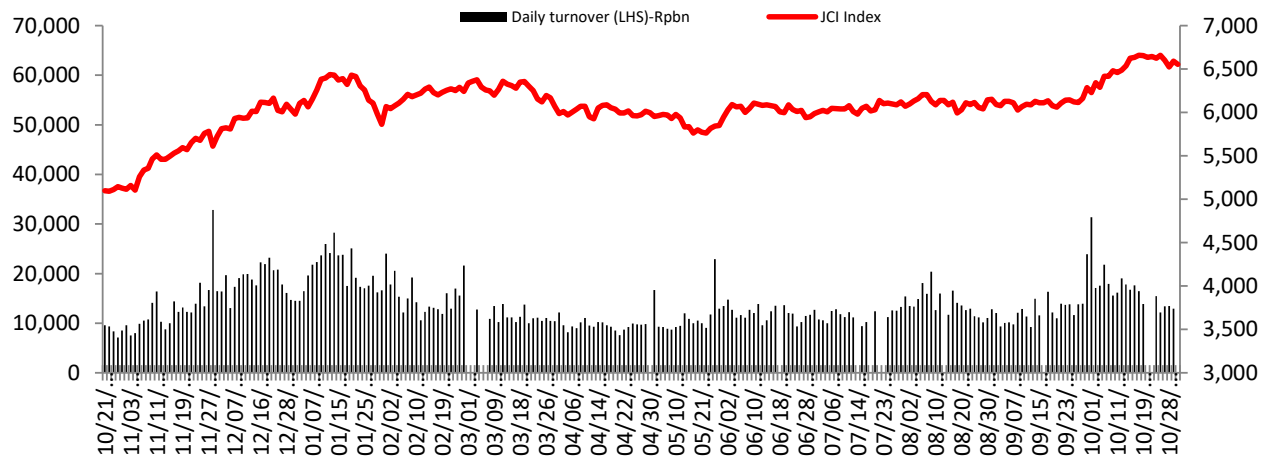


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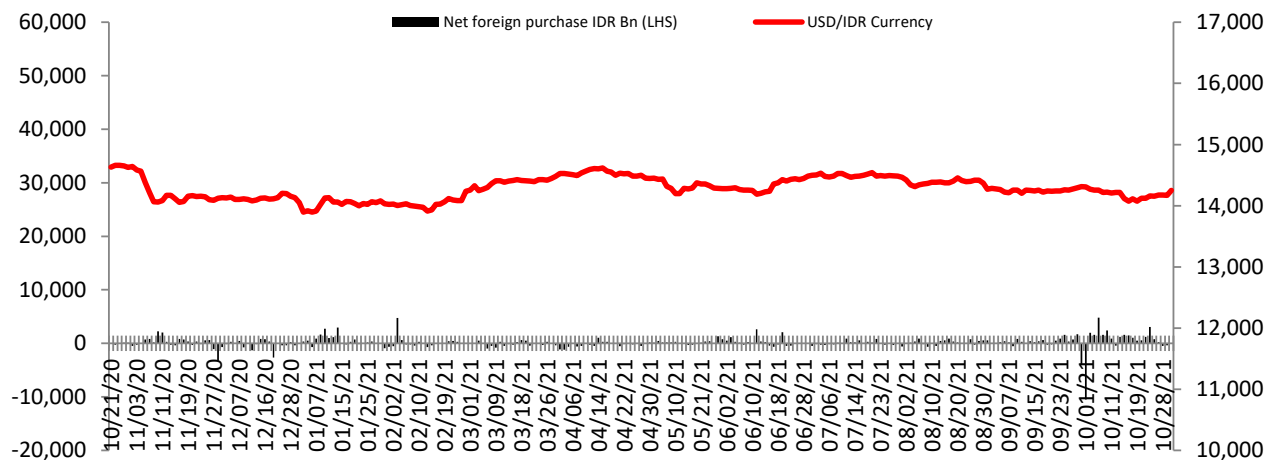
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GRAPHS & TABLES

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	101.6	(0.1)	(0.0)	5Y
FR82	FR0082 Govt	102.0	(0.3)	(2.7)	10Y
FR80	FR0080 Govt	99.8	0.0		15Y
FR83	FR0083 Govt	105.1	(0.1)	(5.2)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,552.9	(0.6)	9.6	
Thailand	SET Index	1,613.8	(0.6)	11.3	
Korean Stock Exch.	KOSPI Index	2,978.9	0.3	3.7	
Straight Times	FSSTI Index	3,219.1	0.7	13.2	
Kuala Lumpur	KLCI Index	1,530.9	(2.0)	(5.9)	
Philippines	PCOMP Index	7,054.7	(1.4)	(1.2)	
Nikkei	NKY Index	29,647.1	2.6	8.0	
Hang Seng	HSI Index	25,154.3	(0.9)	(7.6)	
MSCI-Asia pacific	MXAP Index	197.2	(0.8)	(1.4)	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,819.6	0.2	17.0	
S&P 500	SPX Index	4,605.4	0.2	22.6	
Nasdaq	CCMP Index	15,498.4	0.3	20.3	
FTSE 100	UKX Index	7,278.5	0.6	12.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,248.0	(0.6)	(1.4)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,169.8	(0.2)	0.6
3 month	IDSWT3M Index	14,169.0	(0.2)	(0.5)
6 month	IDSWT6M Index	14,175.0	(0.1)	(0.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,208.2	(0.2)	(0.3)
6 month	IDFWT6M Index	14,300.0	(1.0)	0.8
			(0.0)	

*price as of 10/29/2021


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