



FOR PROFESSIONAL INVESTORS - 11/25/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### UP

JCI slightly strengthened and closed at 6,699 (+16 points or +0.24%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 14Bn today and rupiah was stabilized at IDR 14,268/USD.

Banking stocks were mixed as BMRI (+2.8%), BBNI (+1.41%), and BBRI (+0.24%) inched higher, while MEGA (-1.75%) and BBKA (-0.67%) closed lower. Consumer names were negative as GGRM (-0.89%), ICBP (-0.56%), INDF (-1.15%), UNVR (-0.41%), and HMSP (-1.91%) all closed lower. Telco stocks were positive as TLKM (+5.26%), ISAT (+3.26%), and EXCL (+1.35%) all inched higher. Mining names were positive as ADRO (+2.95%), INCO (+1.23%), ITMG (+2.25%), PTBA (+1.5%), and TINS (+1.2%) all rose. Other movers were ASSA (+9.57%), SILO (+5.98%), BBHI (-5.76%), and EMTK (-5.1%).

Ministry of Energy and Mineral Resources (ESDM) targets investment in the sector to reach US\$34.5bn. Renewable energy portion would grow more than double from the last two years and each US\$5.6bn. 10M21 realization is at US\$19.2bn and expected to reach US\$26.3bn in FY21.

### BOND MARKET

#### WITHIN RANGE

The bond market saw no improvement in risk sentiment today although we witnessed two ways trading in the market. Morning session saw mixed interest started by interbank. While on the afternoon session as we witnessed offshore names showed their selling interest particularly after London opened although trading volume remained thin. Price movement went back to range bound compare to yesterday lacking fresh catalyst

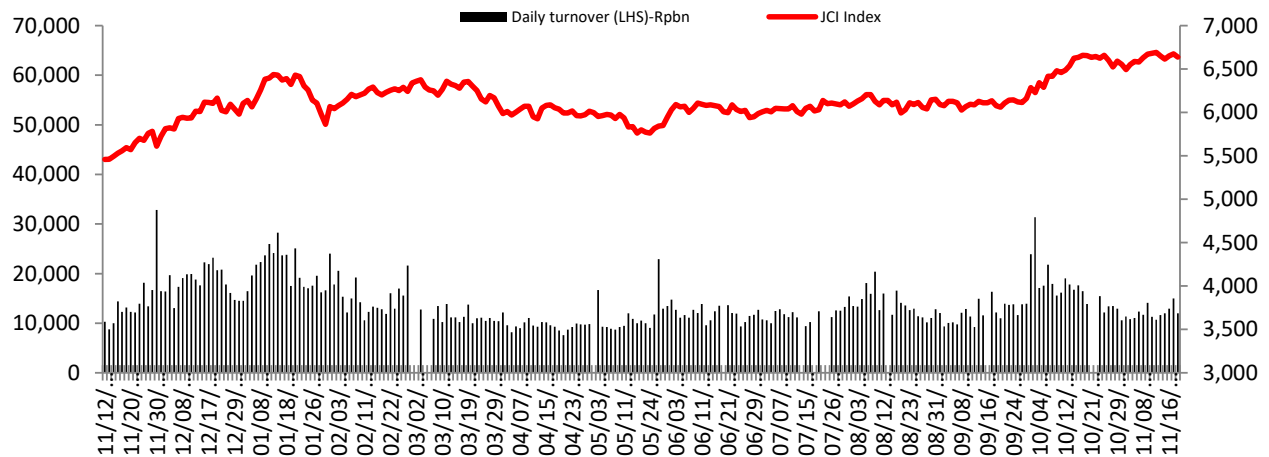


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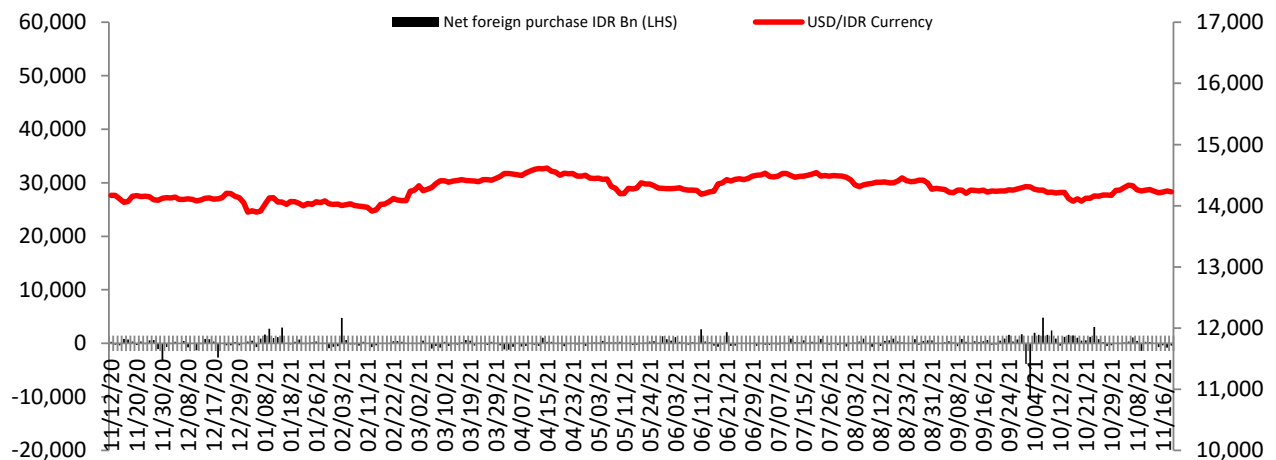
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## GRAPHS & TABLES

### 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	101.9	0.0	0.2	5Y
FR82	FR0082 Govt	102.2	(0.0)	(2.4)	10Y
FR80	FR0080 Govt	100.2	(0.0)		15Y
FR83	FR0083 Govt	106.1	(0.1)	(4.2)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,699.3	0.2	12.0	
Thailand	SET Index	1,648.5	(0.1)	13.7	
Korean Stock Exch.	KOSPI Index	2,980.3	(0.5)	3.7	
Straight Times	FSSTI Index	3,221.5	(0.2)	13.3	
Kuala Lumpur	KLCI Index	1,517.6	(0.3)	(6.7)	
Philippines	PCOMP Index	7,369.3	(0.7)	3.2	
Nikkei	NKY Index	29,499.3	0.7	7.5	
Hang Seng	HSI Index	24,740.2	0.2	(9.1)	
MSCI-Asia pacific	MXAP Index	196.4	(0.6)	(1.8)	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,804.4	(0.0)	17.0	
S&P 500	SPX Index	4,701.5	0.2	25.2	
Nasdaq	CCMP Index	15,845.2	0.4	22.9	
FTSE 100	UKX Index	7,294.2	0.1	12.9	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,268.0	(0.1)	(1.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,270.0	0.1	1.3
3 month	IDSWT3M Index	14,268.3	(0.0)	(1.2)
6 month	IDSWT6M Index	14,274.9	0.1	(1.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,310.0	(0.0)	(1.1)
6 month	IDFWT6M Index	14,460.0	0.3	(0.3)

\*price as of 11/24/2021


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\* PT BNP Asset Management (address: Sequis Tower, 29<sup>th</sup> Floor, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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