



FOR PROFESSIONAL INVESTORS - 02/08/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### SLIDE DOWN

JCI slightly weakened and closed at 6,790 (-15 points or -0.23%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 1.5Tn today and rupiah was stabilized at IDR 14,393/USD.

Banking stocks were mostly positive as BBRI (+0.91%), BMRI (+1.67%), BBNI (+1.69%), and PNB ( +10%) all closed higher, except BBCA (-0.96%). Consumer names were mostly negative as ICBP (-0.29%), MYOR (-1.85%), INDF (-1.54%), and KLBF (-2.67%) all weakened, except HMSP (+1.04%). Retailer stocks were negative as MAPA (-4.92%), ACES (-2.35%), LPPF (-5.64%), and AMRT (-1.61%) all closed lower. Hospital names were negative as SILO (-0.31%), HEAL (-1.4%), and MIKA (-6.8%) all down. Other movers were BABP (+10.99%), BBKP (+5.76%), TMAS (-6.88%), and ESSA (-6.62%).

National Agency of Drug and Food Control (BPOM) has given Approval for the Implementation of Clinical Trials (PPUK) for Merah Putih vaccine. It is targeted to receive commercial certificate in Apr22.

### BOND MARKET

#### SUKUK AUCTION

It was a dull day for the bond market with relatively thin trading volume. After open the day unchanged, bond prices moved nowhere in the first trading session as we heard hardly any trade done. Prices inched higher in the second session lead by 5Y areas and followed by 10Y.

In today sukuk auction, MoF was received demand with only a total of IDR 29.38Tn incoming bids out of which MoF absorbed in the amount of IDR 11Tn (same as initial target). The series absorbed (against incoming bids) on the auction were IDR 2.15Tn (IDR 14.48Tn) 6mo SPN-S, IDR 2.65Tn (IDR 3.55Tn) 2Y PBS31, IDR 3.75Tn (IDR 4.562Tn) 4Y PBS32, IDR 1Tn (IDR 5.967Tn) 12Y PBS29, IDR 0.4Tn (IDR 1.985Tn) 17Y PBS34 and IDR 1.05Tn (IDR 1.517Tn) 25Y PBS33 at cut off yields of 2.05%, 4.04%, 4.96%, 6.43%, 6.53% and 6.76% respectively.

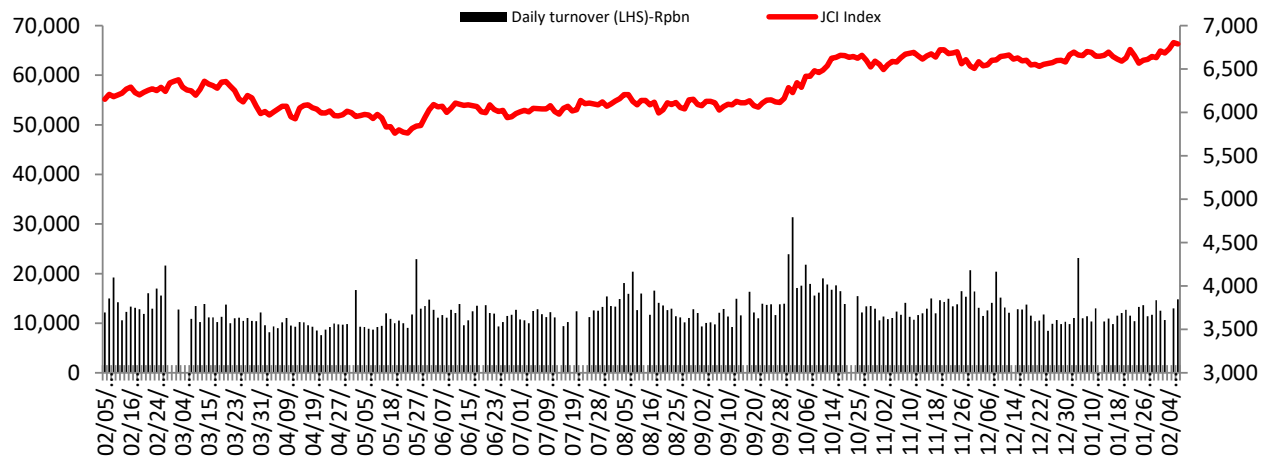


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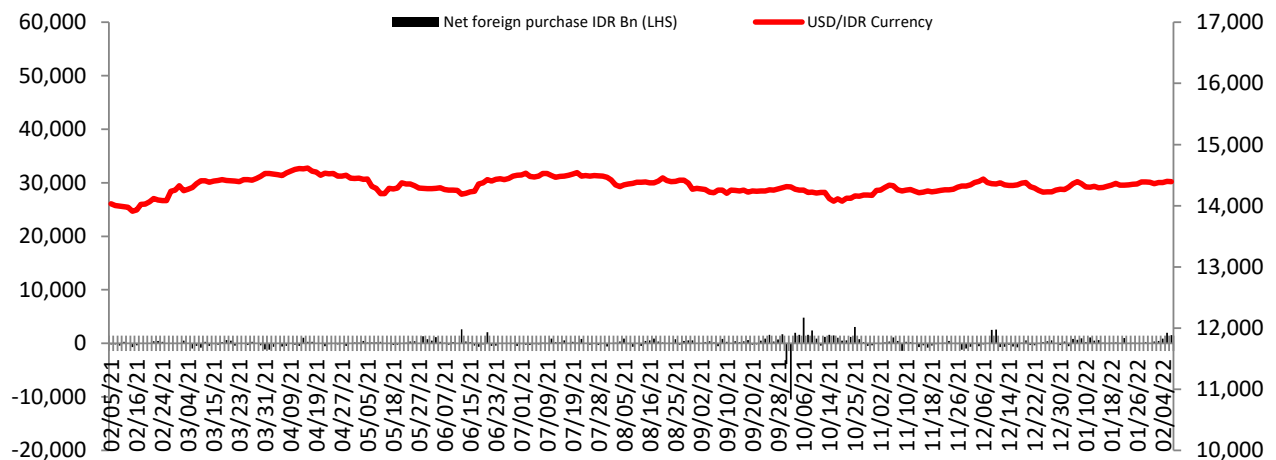
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## GRAPHS & TABLES

### JCI & DAILY TURNOVER



### IDR & NET FOREIGN PURCHASES



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## EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	99.4	(0.0)	(1.5)	5Y
FR82	FR0082 Govt	99.1	(0.1)	(1.6)	10Y
FR80	FR0080 Govt	99.3	0.0		15Y
FR83	FR0083 Govt	102.0	(0.1)	(0.6)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,789.5	(0.2)	3.2	
Thailand	SET Index	1,684.2	0.4	1.6	
Korean Stock Exch.	KOSPI Index	2,746.5	0.1	(7.8)	
Straight Times	FSSTI Index	3,401.7	1.0	8.9	
Kuala Lumpur	KLCI Index	1,530.1	(0.0)	(2.4)	
Philippines	PCOMP Index	7,458.2	1.1	4.7	
Nikkei	NKY Index	27,284.5	0.1	(5.2)	
Hang Seng	HSI Index	24,329.5	(1.0)	4.0	
MSCI-Asia pacific	MXAP Index	187.7	(0.1)	(2.8)	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,091.1	0.0	(3.4)	
S&P 500	SPX Index	4,483.9	(0.4)	(5.9)	
Nasdaq	CCMP Index	14,015.7	(0.6)	(10.4)	
FTSE 100	UKX Index	7,579.6	0.1	2.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,393.0	0.0	(1.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,404.2	0.2	1.0
3 month	IDSWT3M Index	14,395.0	0.1	(0.9)
6 month	IDSWT6M Index	14,404.3	0.2	(1.0)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,404.2	0.3	(0.7)
6 month	IDFWT6M Index	14,495.7	0.2	(0.8)
			(0.1)	(0.8)

\*price as of 2/8/2022


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