



FOR PROFESSIONAL INVESTORS - 12/13/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

SLIGHTLY UP

JCI slightly strengthened and closed at 6,663 (+10 points or +0.15%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 659Bn today and rupiah slightly strengthened to IDR 14,343/USD.

Banking stocks were mixed as BBRI (+0.73%), BBNI (+1.11%), and BDMN (+0.84%) inched higher, while BMRI (-1.04%) and BBKA (-1.02%) closed lower. Consumer names were mostly negative as MYOR (-0.93%), INDF (-1.13%), ICBP (-1.13%), and UNVR (-1.13%) all closed lower, except HMSP (+1.49%). Material stocks were positive as TPIA (+3.89%) and BRPT (+0.57%) all in green. Telco names were mixed as EXCL (+1.6%) up, while FREN (-3.23%) and TLKM (-1.69%) weakened. Other movers were BMAS (+24.84%), BRAM (+18.1%), GEMS (-6.13%), and UNTR (-4.24%).

Govt finalized 2022 average excise hike at ~12%, slightly lower than the increase in 2021 (~12.5%).

BOND MARKET

LIMITED ACTIVITY

IDR bond market relatively quiet in the morning session with prices moved within range lacking fresh catalyst. There was no significant price movement in the market with only limited trading seen in the benchmark series. Market has only started to be busy in the second session triggered by selling interest into selected series including the 5Y FR86/10Y FR87 that got traded down to 101.4 (5.12%) and 101.35 (6.3%) respectively. Overall the yield closed the day higher by around 1 – 2 bps compared to last Friday's closing.

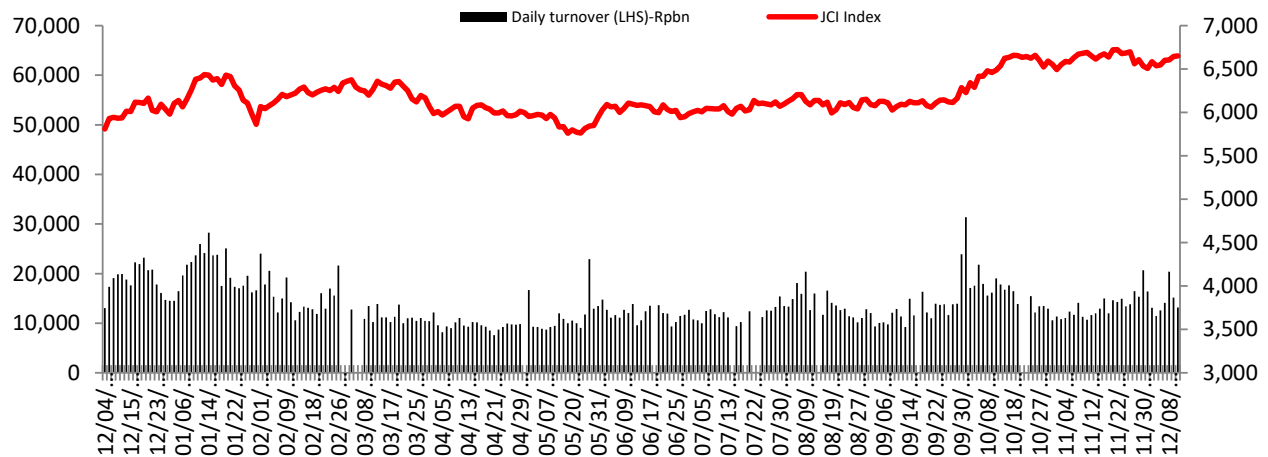


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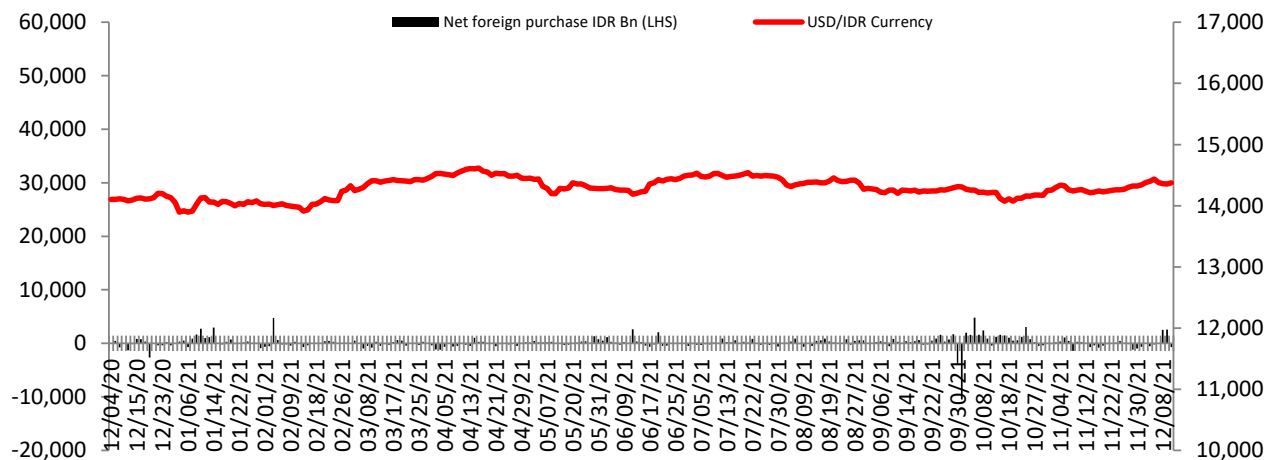
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GRAPHS & TABLES

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	101.4	0.0	(0.3)	5Y
FR82	FR0082 Govt	101.4	(0.0)	(3.2)	10Y
FR80	FR0080 Govt	99.8	0.0		15Y
FR83	FR0083 Govt	104.3	(0.1)	(5.8)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,662.9	0.1	11.4	
Thailand	SET Index	1,625.8	0.5	12.2	
Korean Stock Exch.	KOSPI Index	3,001.7	(0.3)	4.5	
Straight Times	FSSTI Index	3,120.0	(0.5)	9.7	
Kuala Lumpur	KLCI Index	1,494.9	0.4	(8.1)	
Philippines	PCOMP Index	7,197.6	0.1	0.8	
Nikkei	NKY Index	28,640.5	0.7	4.4	
Hang Seng	HSI Index	23,954.6	(0.2)	(12.0)	
MSCI-Asia pacific	MXAP Index	194.1	(0.7)	(2.9)	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,971.0	0.6	17.5	
S&P 500	SPX Index	4,712.0	1.0	25.5	
Nasdaq	CCMP Index	15,630.6	0.7	21.3	
FTSE 100	UKX Index	7,279.1	(0.2)	12.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,343.0	0.2	(2.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,377.5	0.2	2.0
3 month	IDSWT3M Index	14,378.8	0.2	(2.0)
6 month	IDSWT6M Index	14,380.0	0.1	(2.0)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,403.9	0.1	(1.7)
6 month	IDFWT6M Index	14,495.0	(0.5)	(0.6)
			(0.0)	

*price as of 12/10/2021


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