

FOR PROFESSIONAL INVESTORS - 07/06/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### REBOUNDED

JCI advanced and closed at 6,047 (+42 points or +0.69%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 177Bn today and rupiah was stabilized at IDR 14,470/USD.

Banking stocks were negative as PNB (-1.88%), MEGA (-1.57%), BBRI (-0.26%), BMRI (-1.28%), and BBCA (-0.9%) all weakened. Consumer names were mixed as ICBP (+2.13%) and UNVR (+1.01%) closed higher, while KLB (-1.44%), HMSP (-1.28%), and GGRM (-5.75%) declined. Mining stocks were positive as ANTM (+10.71%), INCO (+4.01%), ITMG (+10.54%), ADRO (+4.45%), and PTBA (+4.37%) all closed higher. Retailer names were positive as AMRT (+7.6%), ACES (+4.58%), MAPI (+4.62%), and LPPF (+6.3%) all inched higher. Other movers were SCMA (+18.46%), BBHI (+15.74%), MASA (-7%), and FREN (-3.25%).

Gov't increases the national economic recovery (PEN) budget to Rp925tn or +32.3% from previous budget of Rp699.2tn. Highest increase in budget was seen in the health segment, where it is added by Rp120.7tn to Rp293.6tn (+69.8% from previous budget).

### BOND MARKET

#### AUCTION DAY

Indonesia bond market start the day with wide spread and softer tone. Limited activities remained focus on 10Y area while the other part of the yield curve was quoted within range throughout the day. There is not much activity from foreign ahead of fresh supply in local IDR bond market.

In the conventional auction today, government received incoming bids totaling at IDR 83.403Tn. MoF managed to upsized the issuance to IDR 34Tn (initial target: IDR 33Tn). The series absorbed (against incoming bids) on the auction were IDR 1Tn (IDR 3.55Tn) 3mo SPN, IDR 1.7Tn (IDR 3.25Tn) 12mo SPN, IDR 11.45Tn (IDR 22.687Tn) 6Y FR90, IDR 12Tn (IDR 33.975Tn) 11Y FR91, IDR 1.55Tn (IDR 2.884Tn) 15Y FR88, IDR 6.1Tn (IDR 15.137Tn) 20Y FR83 and IDR 0.2Tn (IDR 1.920Tn) 30Y FR89 at weighted average yields of 3.00%, 3.35%, 5.45%, 6.58%, 6.41%, 7.29% and 6.93% respectively.

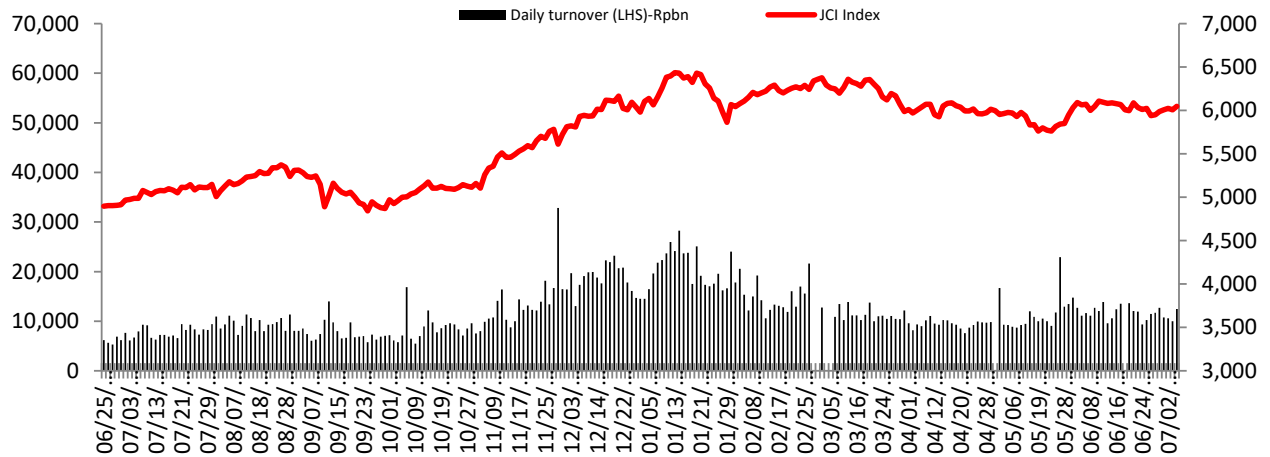


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**ASSET MANAGEMENT**

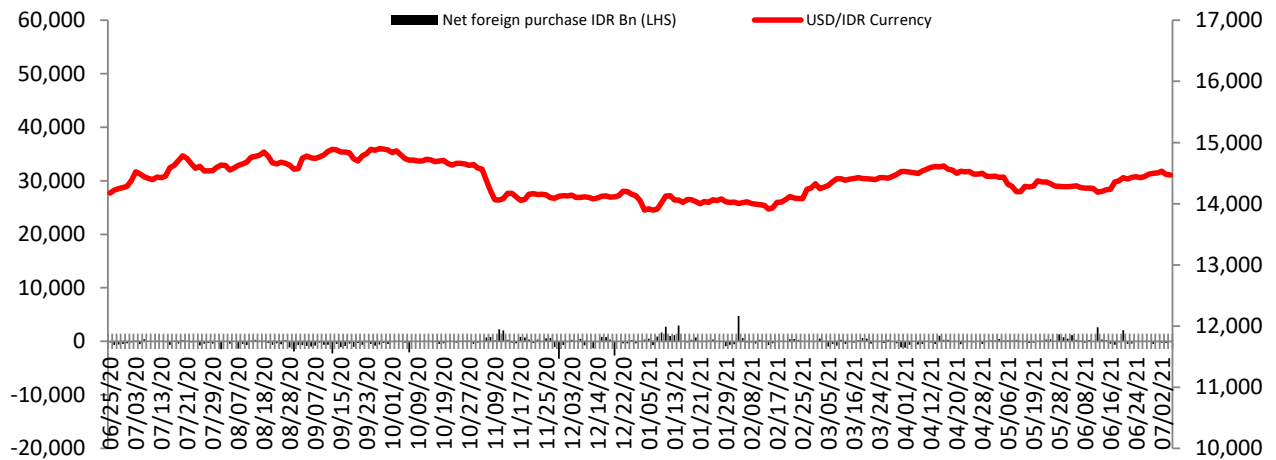
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## GRAPHS & TABLES

### 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	100.6	(0.0)	(1.1)	5Y
FR82	FR0082 Govt	99.7	0.1	(4.8)	10Y
FR80	FR0080 Govt	98.6	0.0		15Y
FR83	FR0083 Govt	102.6	0.0	(7.4)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,047.1	0.7	1.1	
Thailand	SET Index	1,591.4	0.8	9.8	
Korean Stock Exch.	KOSPI Index	3,305.2	0.4	15.0	
Straight Times	FSSTI Index	3,190.6	1.6	12.2	
Kuala Lumpur	KLCI Index	1,531.6	(0.0)	(5.9)	
Philippines	PCOMP Index	6,992.4	(0.6)	(2.1)	
Nikkei	NKY Index	28,643.2	0.2	4.4	
Hang Seng	HSI Index	28,072.9	(0.3)	3.1	
MSCI-Asia pacific	MXAP Index	206.2	0.1	3.1	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,786.4	0.4	13.7	
S&P 500	SPX Index	4,352.3	0.8	15.9	
Nasdaq	CCMP Index	14,639.3	0.8	13.6	
FTSE 100	UKX Index	7,154.2	(0.2)	10.7	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,470.0	0.0	(2.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,530.0	(0.1)	3.1
3 month	IDSWT3M Index	14,480.7	(0.3)	(2.7)
6 month	IDSWT6M Index	14,481.7	(0.5)	(2.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,536.9	(0.5)	(2.7)
6 month	IDFWT6M Index	14,671.7	0.1	(1.8)

\*price as of 7/5/2021



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