

FOR PROFESSIONAL INVESTORS - 10/05/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

FLAT

JCI was flat and closed at 7,075 (+3 points or +0.04%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net inflow of IDR 77Bn today and rupiah slightly strengthened to IDR 15,193/USD.

Banking stocks were mixed as BMRI (+0.54%) and MEGA (+0.45%) inched higher, while BBTN (-1.67%), BBKA (-1.17%), and BBRI (-2.16%) corrected. Consumer names were mixed as KLBF (+1.65%), ICBP (+1.47%), and GGRM (+0.56%) up, while INDF (-0.41%) and UNVR (-0.82%) retreated. Material stocks were positive as BRPT (+4.55%) and TPIA (+0.82%) all rose. Pulp & paper names were negative as TKIM (-0.97%) and INKP (-2.85%) all retreated. Other movers were TMAS (+14.11%), KPIG (+8.33%), LINK (-6.42%), and ISAT (-2.41%).

The increase in fuel cost has impacted to increasing MRT passenger volume. In Aug-22, daily passengers reached 60.2k while in Sep-22 it reached 67.2k (+11.6% MoM)

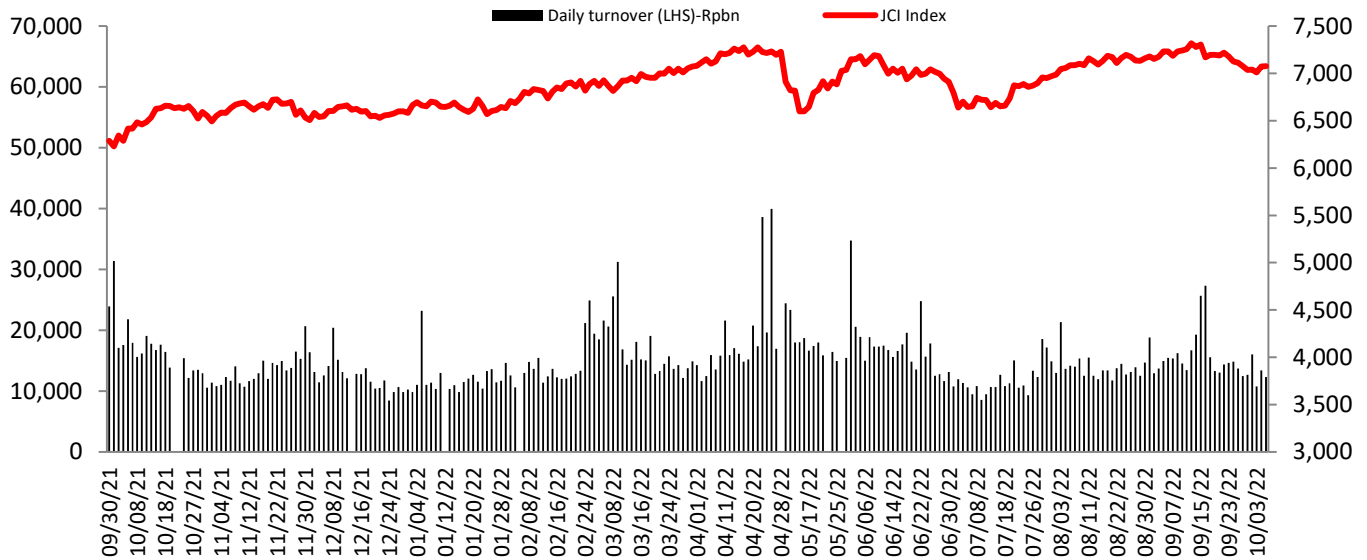
BOND MARKET

MOVED UP

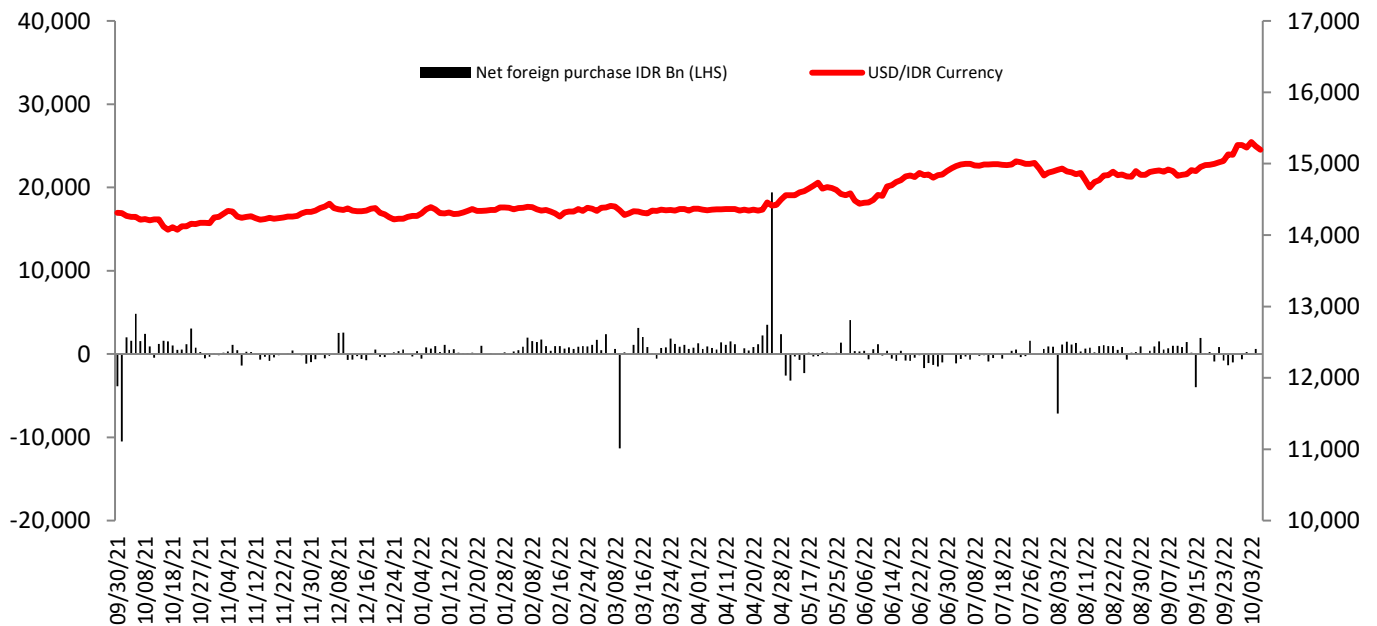
There was no change in the overall sentiment of the bond market today. Continued interest was visible in the belly tenor with 10Y FR91 traded at 94.90 (7.12%) and 20Y FR92 traded to as high as 99.15 (7.20%). Price increase unfortunately was capped as profit taking kicked in on the second session. Nevertheless, yield curve closed lower around 3-12bps with the benchmark series of 5, 10, 15 and 20Y closed at mid yield of 6.62%, 7.17%, 7.14% and 7.22% respectively. Meanwhile, MoF held Green Shoe Option today after a lackluster demand in yesterday's sukuk auction and issued an additional IDR 2.67tn. The winners get the benchmark series at the weighted average yields of the original auction yesterday.

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	94.2	0.1	(6.6)	5Y
FR82	FR0082 Govt	94.5	0.5	(6.2)	10Y
FR80	FR0080 Govt	93.0	0.1		15Y
FR83	FR0083 Govt	98.4	0.4	(4.1)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,075.4	0.0	7.5	
Thailand	SET Index	1,580.3	0.1	(4.7)	
Korean Stock Exch.	KOSPI Index	2,215.2	0.3	(25.6)	
Straight Times	FSSTI Index	3,153.2	0.5	0.9	
Kuala Lumpur	KLCI Index	1,420.6	0.8	(9.4)	
Philippines	PCOMP Index	5,988.6	0.0	(15.9)	
Nikkei	NKY Index	27,120.5	0.5	(5.8)	
Hang Seng	HSI Index	18,088.0	5.9	(22.7)	
MSCI-Asia pacific	MXAP Index	142.2	2.4	(26.4)	
<u>Global Indices</u>					
Dow Jones	INDU Index	30,316.3	2.8	(16.6)	
S&P 500	SPX Index	3,790.9	3.1	(20.5)	
Nasdaq	CCMP Index	11,176.4	3.3	(28.6)	
FTSE 100	UKX Index	6,991.3	(1.3)	(5.3)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,193.0	0.3	(6.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,293.7	(0.0)	7.3
3 month	IDSWT3M Index	15,243.9	(0.3)	(6.8)
6 month	IDSWT6M Index	15,275.4	0.3	(7.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,314.7	0.2	(7.1)
6 month	IDFWT6M Index	15,333.5	(0.0)	(6.6)
				(6.7)

*price as of 10/5/2022



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