

FOR PROFESSIONAL INVESTORS - 09/07/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

RETREATED

CI weakened and closed at 7,187 (-46 points or -0.64%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 672Bn today and rupiah slightly weakened to IDR 14,918/USD.

Banking stocks were mixed as BBKA (+1.21%) and BMRI (+0.57%) advanced, while MEGA (-0.46%), BBNI (-2%), and BBRI (-2.19%) weakened. Consumer names were mixed as UNVR (+1.77%) and KLBF (+0.3%) up, while MYOR (-1.68%), INDF (-0.79%), and ICBP (-1.16%) weakened. Telco stocks were negative as FREN (-2.06%), ISAT (-3.47%), and TLKM (-0.44%) all retreated. Construction names were negative as ADHI (-1.84%), WSKT (-1.82%), PTPP (-3.45%), and WIKA (-3.3%) all down. Other movers were IATA (+9.49%), BHIT (+6.49%), MEDC (-6.53%), and ARTO (-4.28%).

Banking credit growth is revised to 10.33 % yoy, from 7.5% before. Banking sector is targeting profit at the end of the year up to Rp 162 tn.

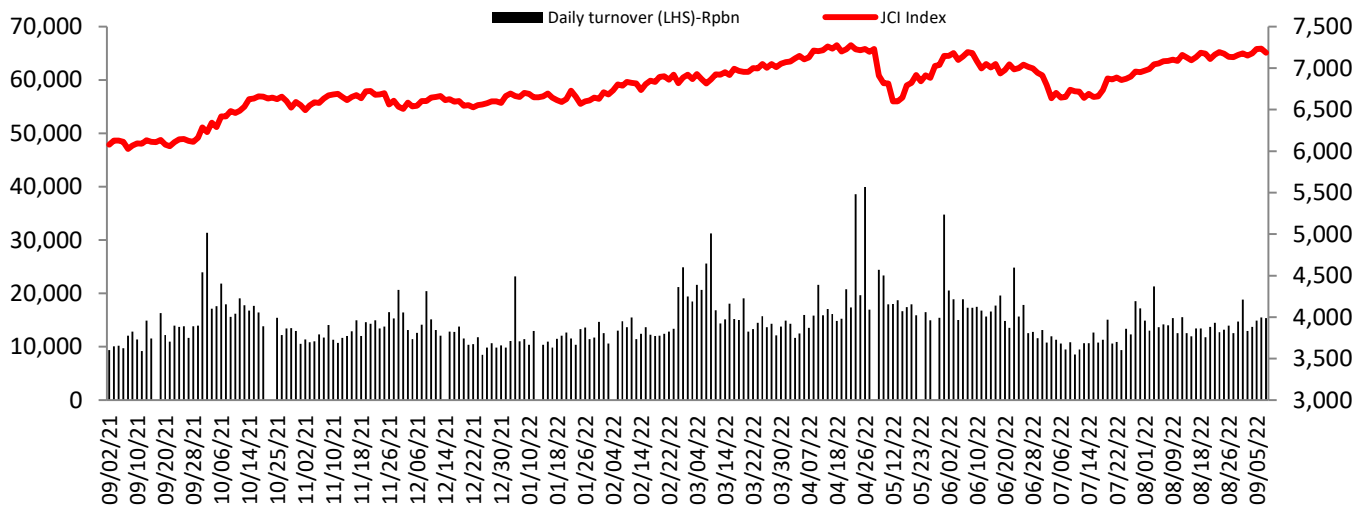
BOND MARKET

WEAKER

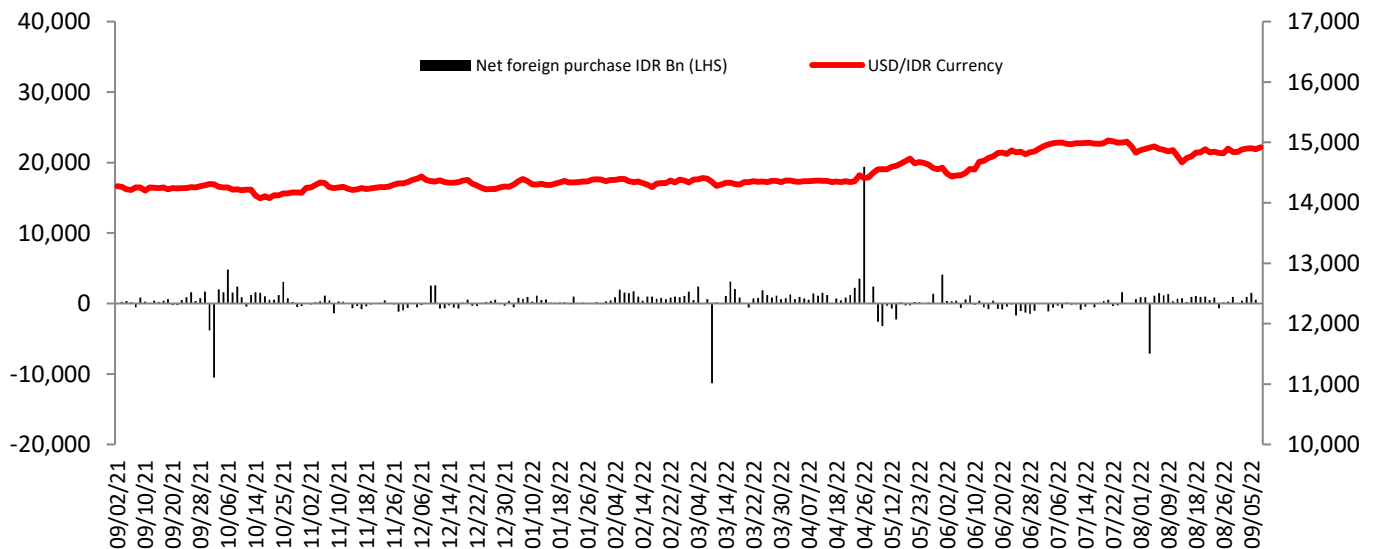
IDR bond prices traded lower today by about 25-50bps with 10Y UST yield touched 3.35%. Depreciation of IDR against USD also pushed selling activities on all benchmark series throughout the day. Prices opened weaker with relatively wide spread. Onshore foreign banks interests remained focused on front to mid-dated bonds although trading on other part of the curve was heard as well. Overall yield curve closed slightly higher by 3 – 10 bps. The benchmark series of 5, 10, 15 and 20Y closed at mid-yield of 6.75%, 7.2%, 7.18% and 7.18% respectively.

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	93.7	(0.2)	(7.1)	5Y
FR82	FR0082 Govt	94.4	(0.3)	(6.3)	10Y
FR80	FR0080 Govt	93.4	(0.1)		15Y
FR83	FR0083 Govt	99.6	#VALUE!	(3.0)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,186.8	(0.6)	9.2	
Thailand	SET Index	1,639.3	0.3	(1.1)	
Korean Stock Exch.	KOSPI Index	2,376.5	(1.4)	(20.2)	
Straight Times	FSSTI Index	3,210.8	(0.4)	2.8	
Kuala Lumpur	KLCI Index	1,491.4	0.2	(4.9)	
Philippines	PCOMP Index	6,554.1	(2.3)	(8.0)	
Nikkei	NKY Index	27,430.3	(0.7)	(4.7)	
Hang Seng	HSI Index	19,044.3	(0.8)	(18.6)	
MSCI-Asia pacific	MXAP Index	152.6	(0.6)	(21.0)	
<u>Global Indices</u>					
Dow Jones	INDU Index	31,145.3	(0.6)	(14.3)	
S&P 500	SPX Index	3,908.2	(0.4)	(18.0)	
Nasdaq	CCMP Index	11,544.9	(0.7)	(26.2)	
FTSE 100	UKX Index	7,249.7	(0.7)	(1.8)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,918.0	(0.2)	(4.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,886.0	(0.2)	4.4
3 month	IDSWT3M Index	14,883.9	(0.2)	(4.3)
6 month	IDSWT6M Index	14,883.9	(0.2)	(4.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,891.2	(0.2)	(4.1)
6 month	IDFWT6M Index	14,917.0	(0.3)	(3.7)
				(3.6)

*price as of 9/7/2022

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