

FOR PROFESSIONAL INVESTORS - 10/11/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

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JCI weakened and closed at 6,939 (-55 points or -0.79%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflows of IDR 27Bn today and rupiah slightly weakened to IDR 15,358/USD.

Banking stocks were mixed as BBRI (+1.37%) and MEGA (+0.46%) up, while PNB (-0.86%), BBNI (-0.57%), and BBCA (-0.6%) retreated. Consumer names were mixed as ICBP (+0.56%) and HMSP (+1.12%) up, while MYOR (-2.43%), UNVR (-1.46%), and KLBF (-3.17%) closed lower. Infra stocks were negative as JSMR (-0.61%), PGAS (-1.37%), TOWR (-1.21%), and TBIG (-3.7%) all down. Telco names were mixed as EXCL (+0.4%) advanced, while FREN (-1.28%) and TLKM (-2.49%) weakened. Other movers were BACA (+28.45%), CLEO (+9.68%), BRMS (-6.83%), and BUMI (-6.82%).

Indonesia's Consumer Confidence Index (CCI) for the month of September was at 117.2, slightly lower than 124.7 recorded in August. Bank Indonesia noted that the September CCI was supported by optimism regarding current income and job availability although the confidence is not as strong as the month before.

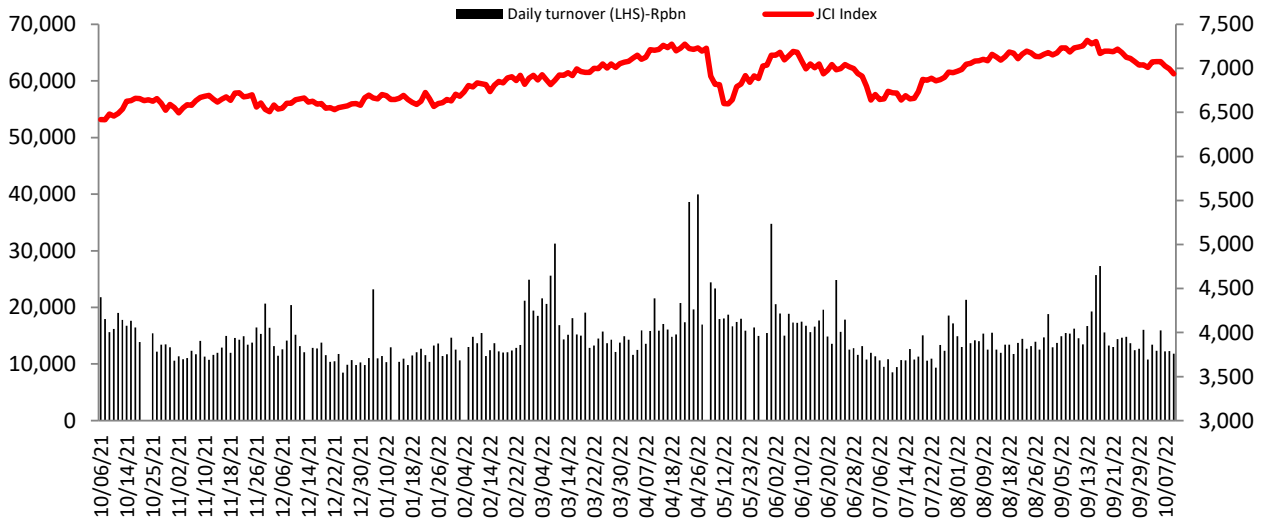
BOND MARKET

AUCTION DAY

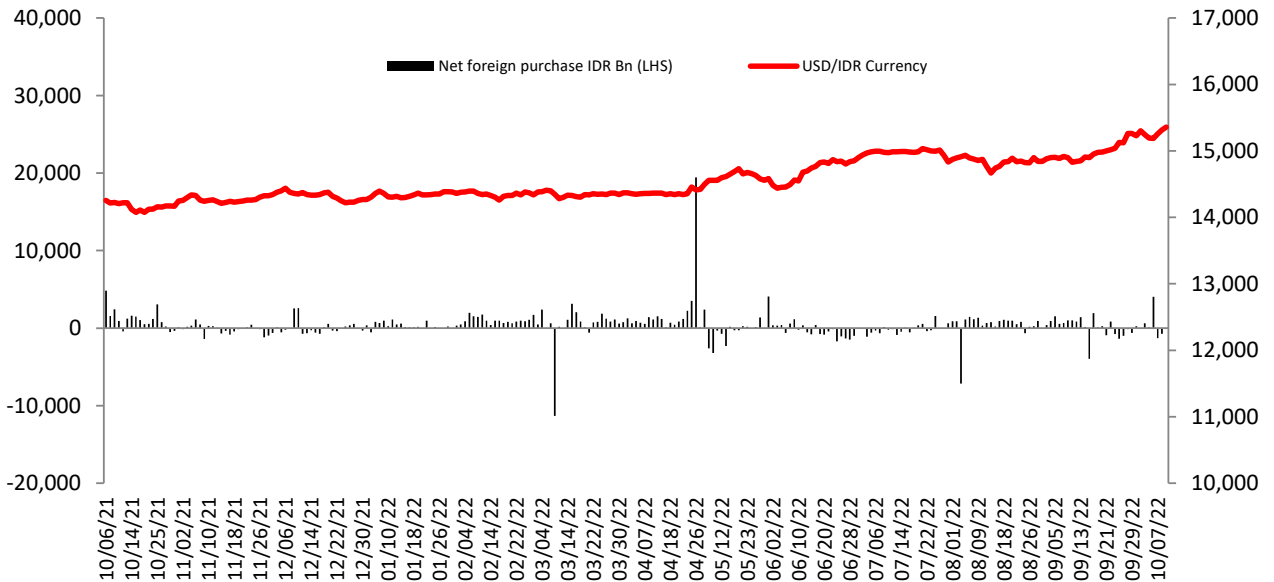
Bond prices opened weaker with overall offerish bias in line with Rupiah slight weakening. Market was relatively quiet throughout the day with small trades on benchmark series. 10Y FR91 was traded down to 93.1 (7.39%). Meanwhile in today's auction, government received lowest incoming bids year to date at only IDR 15tn. The government then decided to downsize issuance to IDR 8.22tn out of the IDR 10tn target and will not held GSO this week. The series absorbed (against incoming bids) on the auction were IDR 0.45tn (IDR 0.625tn) 3mo SPN, IDR 1.05tn (IDR 1.375tn) 12mo SPN, IDR 3.95tn (IDR 4.58tn) 5Y FR95, IDR 2.35tn (IDR 6.77tn) 10Y FR96, IDR 0.35tn (IDR 1.15tn) 15Y FR98, IDR 0.01tn (IDR 0.3tn) 20Y FR97, and IDR 0.06tn (IDR 0.18tn) 29Y FR89 at weighted average yields of 3.09%, 4.01%, 7.11%, 7.36%, 7.40%, 7.39% and 7.35% 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	93.4	(0.3)	(7.4)	5Y
FR82	FR0082 Govt	93.5	(0.5)	(7.2)	10Y
FR80	FR0080 Govt	92.4	(0.1)		15Y
FR83	FR0083 Govt	98.4	(0.1)	(4.2)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,939.1	(0.8)	5.4	
Thailand	SET Index	1,563.3	(0.5)	(5.7)	
Korean Stock Exch.	KOSPI Index	2,192.1	(1.8)	(26.4)	
Straight Times	FSSTI Index	3,107.8	0.0	(0.5)	
Kuala Lumpur	KLCI Index	1,386.8	(1.4)	(11.5)	
Philippines	PCOMP Index	5,847.4	0.3	(17.9)	
Nikkei	NKY Index	26,401.3	(2.6)	(8.3)	
Hang Seng	HSI Index	16,832.4	(2.2)	(28.1)	
MSCI-Asia pacific	MXAP Index	140.8	(1.4)	(27.1)	
<u>Global Indices</u>					
Dow Jones	INDU Index	29,202.9	(0.3)	(19.6)	
S&P 500	SPX Index	3,612.4	(0.7)	(24.2)	
Nasdaq	CCMP Index	10,542.1	(1.0)	(32.6)	
FTSE 100	UKX Index	6,867.9	(1.3)	(7.0)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,358.0	(0.3)	(7.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,290.0	0.8	7.2
3 month	IDSWT3M Index	15,299.6	0.3	(7.2)
6 month	IDSWT6M Index	15,304.8	0.4	(7.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,324.1	0.4	(7.1)
6 month	IDFWT6M Index	15,350.0	0.2	(6.7)
			(0.4)	(7.0)

*price as of 10/11/2022

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