

FOR PROFESSIONAL INVESTORS - 06/30/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

ANOTHER DIP

JCI slightly weakened and closed at 6,912 (-31 points or -0.44%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR -74Bn today and rupiah slightly weakened to IDR 14,898/USD.

Banking stocks were negative as MEGA (-0.95%), BMRI (-0.31%), BBCA (-0.34%), BBNI (-2.18%), and BBRI (-0.72%) all declined. Consumer names were mostly negative as HMSP (-2.01%), INDF (-0.7%), KLBF (-1.78%), and UNVR (-3.44%) all retreated, except ICBP (+1.06%). Mining stocks were negative as INCO (-2.16%), INDY (-6.43%), ANTM (-1.91%), ITMG (-2.7%), and PTBA (-4.26%) all closed lower. Telco names were negative as ISAT (-2.96%), FREN (-5.68%), and TLKM (-0.99%) all declined. Other movers were TOWR (+5.77%), BYAN (+3.93%), PGAS (-4.79%), and BBHI (-4.04%).

Consumer Price Index (CPI) inflation in June 2022 is expected to reach more than 4% or above the gov't upper target. According to Bloomberg consensus, inflation could grow 4.15% YoY with range 3.90-4.46% YoY.

BOND MARKET

TWO WAY INTEREST

The mixed sentiment was seen in the bond market today with the bond price opened around the same level as yesterday's closing. Bond price movement was within range as the market showed two way interests throughout the day. However, in general the bond market moved slightly higher despite local currency closed weakened against USD. USD/IDR opened at IDR 14,860, and closed at range 14,890 – 14,900 today. 10Y FR91 opened at 94.25 (7.2%) traded down as high as 94.6 (7.15%) before finally down to 94.4 (7.179%) and stay at that level until market closed.

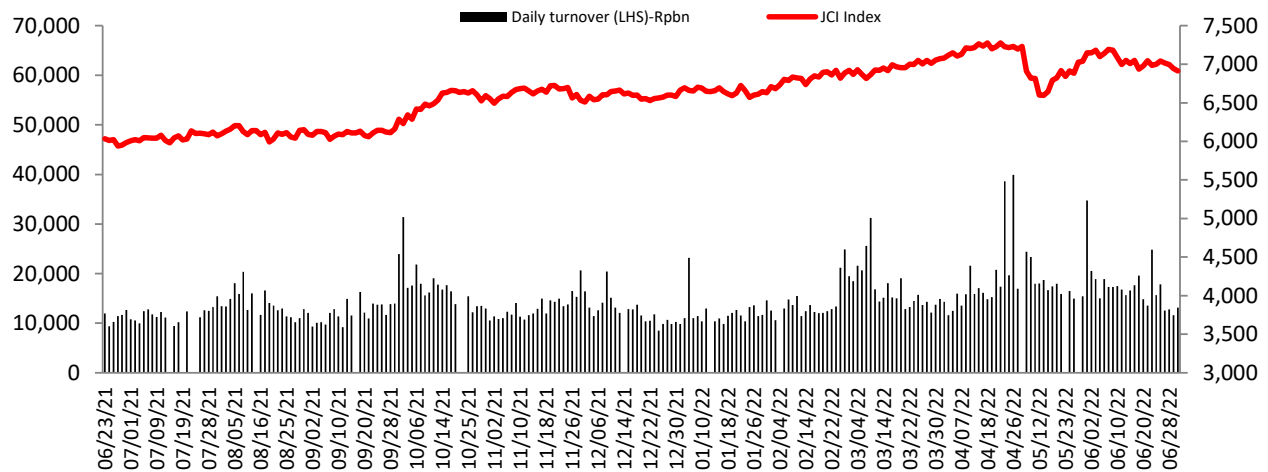


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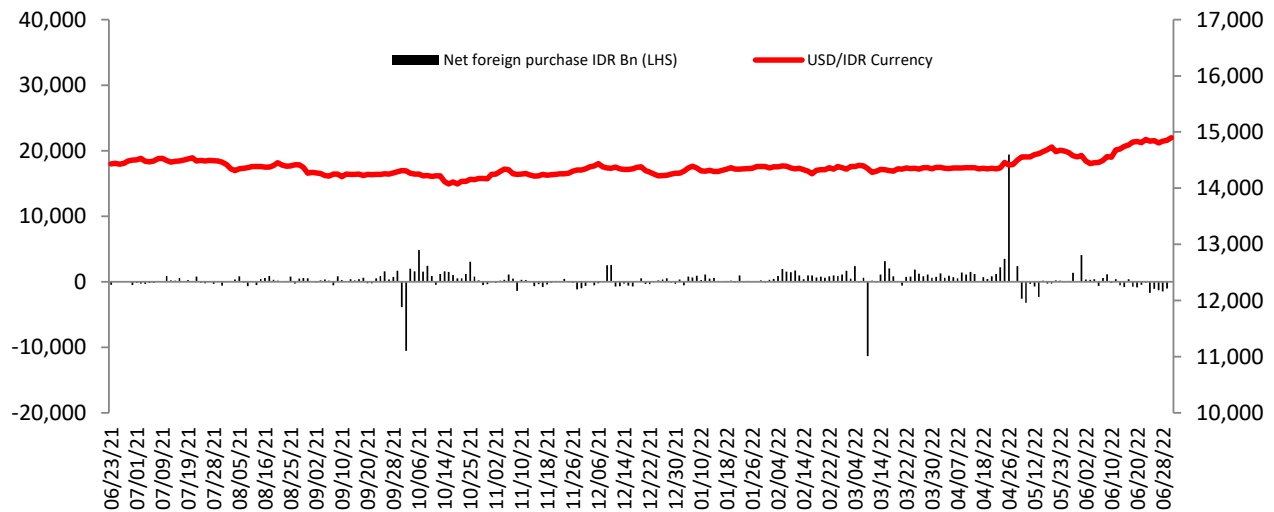
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GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



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EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	96.0	0.5	(4.9)	5Y
FR82	FR0082 Govt	94.3	0.4	(6.5)	10Y
FR80	FR0080 Govt	91.4	0.0		15Y
FR83	FR0083 Govt	98.9	0.1	(3.6)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,911.6	(0.4)	5.0	
Thailand	SET Index	1,567.4	(1.2)	(5.4)	
Korean Stock Exch.	KOSPI Index	2,332.6	(1.9)	(21.7)	
Straight Times	FSSTI Index	3,109.2	(0.8)	(0.5)	
Kuala Lumpur	KLCI Index	1,444.2	(0.5)	(7.9)	
Philippines	PCOMP Index	6,155.4	(2.3)	(13.6)	
Nikkei	NKY Index	26,393.0	(1.5)	(8.3)	
Hang Seng	HSI Index	21,859.8	(0.6)	(6.6)	
MSCI-Asia pacific	MXAP Index	159.6	(1.5)	(17.3)	
<u>Global Indices</u>					
Dow Jones	INDU Index	31,029.3	0.3	(14.6)	
S&P 500	SPX Index	3,818.8	(0.1)	(19.9)	
Nasdaq	CCMP Index	11,177.9	(0.0)	(28.6)	
FTSE 100	UKX Index	7,199.5	(1.5)	(2.5)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,898.0	(0.3)	(4.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,845.3	0.1	4.1
3 month	IDSWT3M Index	14,849.4	0.3	(4.0)
6 month	IDSWT6M Index	14,828.0	(0.1)	(3.9)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,850.7	0.1	(3.8)
6 month	IDFWT6M Index	14,865.5	(0.2)	(3.3)
			(0.0)	(5.2)

*price as of 6/30/2022


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* PT BNP Asset Management (address: Sequis Tower, 29th Floor, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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