

FOR PROFESSIONAL INVESTORS - 07/28/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

HOLDING UP

JCI advanced and closed at 6,957 (+59 points or +0.85%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR24Bn today and rupiah advanced to IDR 14,933/USD.

Banking stocks were mostly positive as BBRI (+0.93%), BBKA (+0.34%), MEGA (+1.93%), and BBNI (+0.64%) all up, except BMRI (-0.62%). Consumer names were negative as MYOR (-3.61%), KLBF (-1.18%), INDF (-1.43%), ICBP (-3.23%), and UNVR (-4.45%) all down. Mining stocks were positive as ANTM (+12.04%), INCO (+9.29%), TINS (+4.88%), ITMG (+0.71%), and INDY (+1.89%) all up. Properties names were positive as SMRA (+6.9%), CTRA (+2.87%), PWON (+3.14%), and BSDE (+1.66%) all in green. Other movers were BMTR (+17.02%), MSIN (+12.68%), BIPI (-5.64%), and MIKA (-3.7%).

The Ministry of Energy and Mineral Resources has ensured that restrictions on the purchase of subsidized fuel oil or subsidized Peralite and Solar will take effect in August 2022, through the revision of Presidential Regulation No. 191/2014 concerning the Supply, Distribution and Retail Selling Price of Fuel Oil was issued this month.

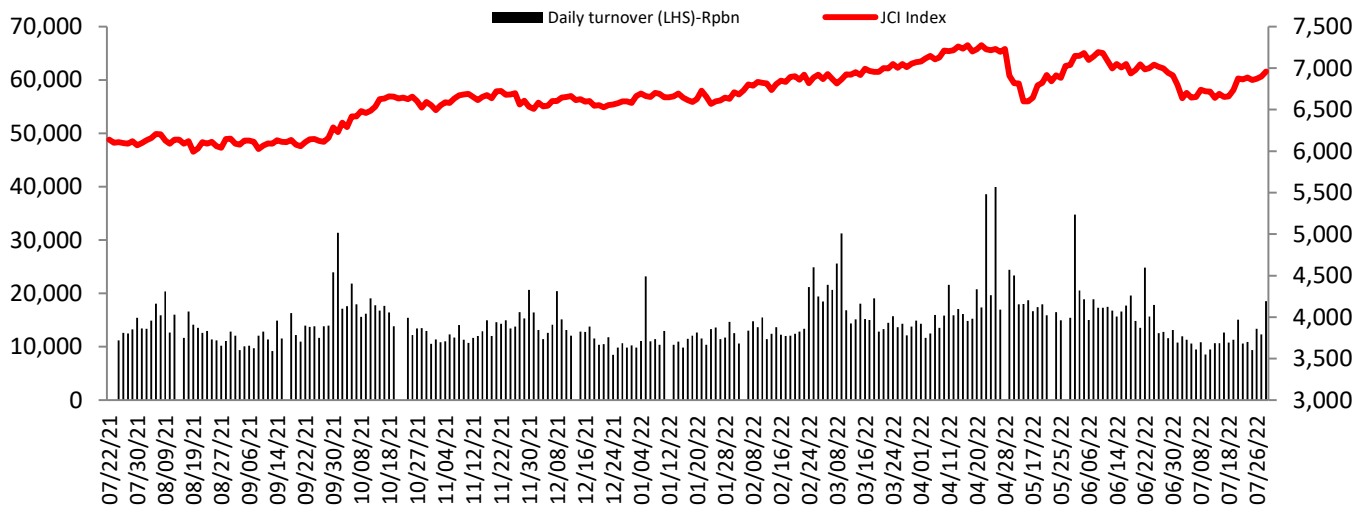
BOND MARKET

EXTENDED BUYING

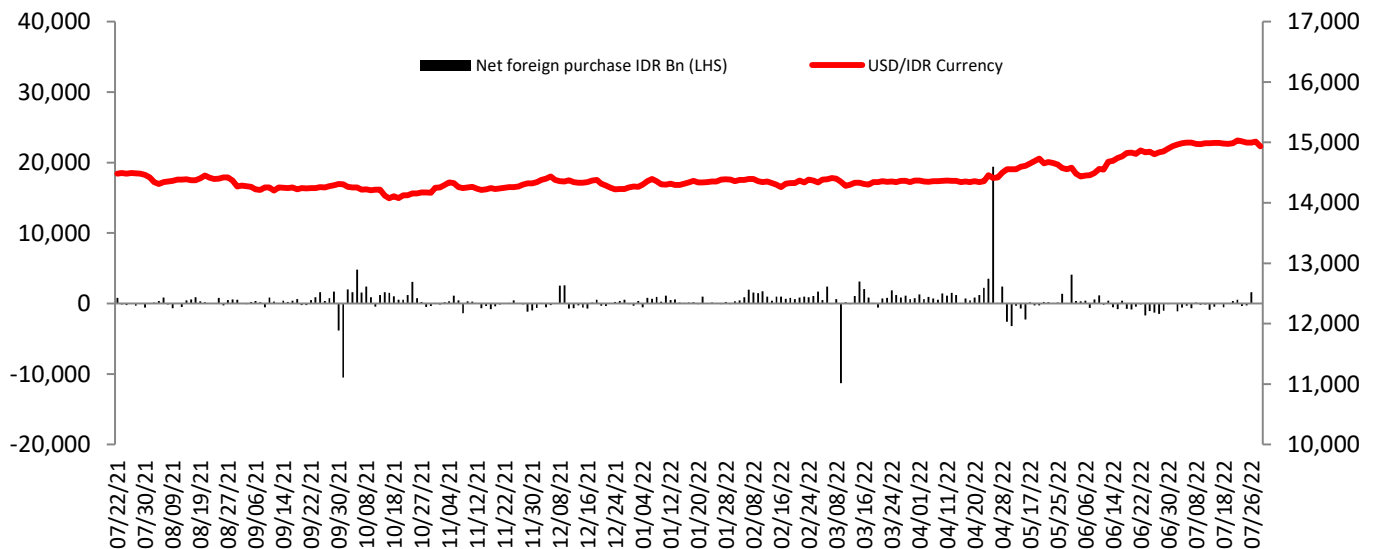
The bond market advanced further today on the back of solid interest from onshore following the expected 75 bps hike by the Fed last night. Buying boosted prices level across the board. Overall sentiment was bullish in line with Rupiah appreciation that traded at 14930/35 in the spot market. As the price across the board climbed higher compared to yesterday level, profit taking inevitably occurred. Indonesia bond market closed yield down by -13/-14/-14/-20 bps for 5Y/10Y/15Y/20Y.

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	94.1	0.4	(6.7)	5Y
FR82	FR0082 Govt	93.8	0.6	(6.9)	10Y
FR80	FR0080 Govt	94.4	1.6		15Y
FR83	FR0083 Govt	98.3	2.2	(4.2)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,956.8	0.8	5.7	
Thailand	SET Index	1,576.4	1.5	(4.9)	
Korean Stock Exch.	KOSPI Index	2,435.3	0.8	(18.2)	
Straight Times	FSSTI Index	3,222.6	0.5	3.2	
Kuala Lumpur	KLCI Index	1,487.4	1.1	(5.1)	
Philippines	PCOMP Index	6,379.3	2.3	(10.4)	
Nikkei	NKY Index	27,815.5	0.4	(3.4)	
Hang Seng	HSI Index	20,622.7	(0.2)	(11.9)	
MSCI-Asia pacific	MXAP Index	158.8	(0.2)	(17.8)	
<u>Global Indices</u>					
Dow Jones	INDU Index	32,197.6	1.4	(11.4)	
S&P 500	SPX Index	4,023.6	2.6	(15.6)	
Nasdaq	CCMP Index	12,032.4	4.1	(23.1)	
FTSE 100	UKX Index	7,330.4	(0.2)	(0.7)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,933.0	0.5	(4.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,995.0	0.0	5.2
3 month	IDSWT3M Index	14,988.2	(0.1)	(5.0)
6 month	IDSWT6M Index	14,993.8	0.0	(5.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,992.3	9,510.5	(4.8)
6 month	IDFWT6M Index	1,551.9	0.9	89.2
			(0.0)	(6.4)

*price as of 7/28/2022

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