



FOR PROFESSIONAL INVESTORS - 06/03/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

INCHED UP

JCI slightly strengthened and closed at 7,183 (+34 points or +0.48%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 316Bn today and rupiah slightly strengthened to IDR 14,438/USD.

Banking stocks were mixed as BBRI (+0.89%), BBNI (+1.13%), and BBCA (+0.33%) advanced, while PNB (-1.09%) and MEGA (-0.84%) closed lower. Consumer names were mostly negative as KLB (-0.31%), MYOR (-1.73%), INDF (-0.37%), and UNVR (-1.46%) all weakened, except HMSP (+1.84%). Mining stocks were mixed as ADRO (+5.71%), PTBA (+1.76%), and ITMG (+0.79%) up, while ANTM (-0.4%) and INCO (-3.15%) closed lower. Telco names were mixed as TLKM (+0.47%) and FREN (+7.5%) up, while EXCL (-1.49%) corrected. Other movers were IPTV (+18.35%), KPIG (+6.59%), MIKA (-6.69%), and BBYB (-6.16%).

Based on data from the Financial Services Authority (OJK) until March 2022, financing receivables for used two-wheelers amounted to Rp18.5tn or grew 10.5% YoY. However, receivables for used cars still contracted (-4% YoY).

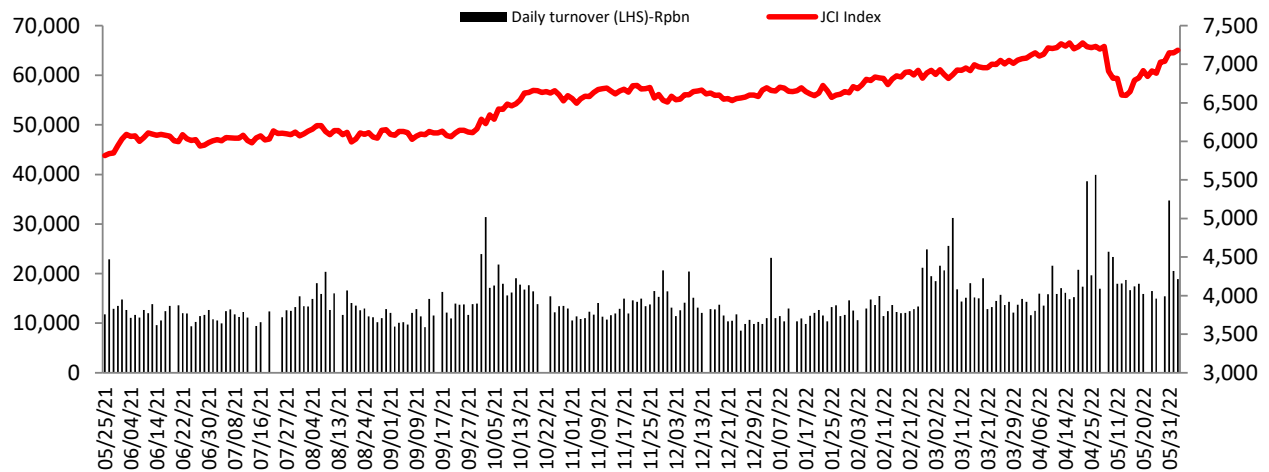
BOND MARKET

UP

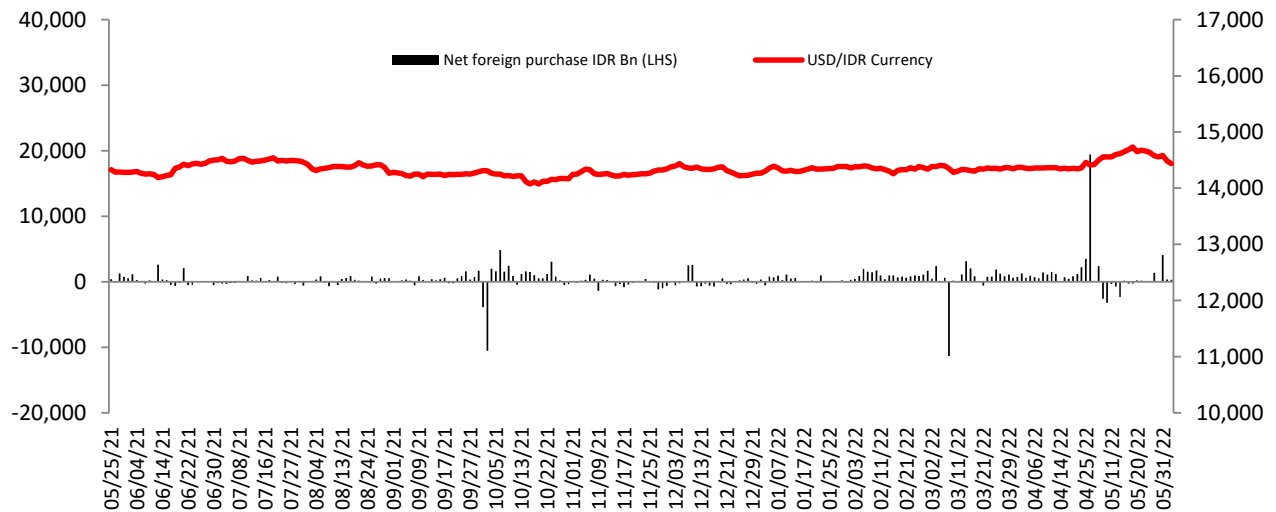
The bond market ended the day stronger backed by Rupiah appreciation as USD weakened hence providing support to local bond market. Overall risk on sentiment from local players hence boosting bond prices across the board. Market activity picking up with trading still heard until middle session, despite profit taking action on the later. Market trading was particularly active on 10Y and 15Y areas which remained as the most actively traded bonds for the day. Overall, yield lower by about 6 – 13bps compared to yesterday closing. Yield curve ended with 5Y/10Y/15Y/20Y benchmark series stood at 5.98%/6.91%/7.18%/7.24%.

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	96.4	0.4	(4.5)	5Y
FR82	FR0082 Govt	96.1	0.5	(4.6)	10Y
FR80	FR0080 Govt	92.3	0.9		15Y
FR83	FR0083 Govt	98.5	0.4	(4.0)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,183.0	0.5	9.1	
Thailand	SET Index	1,647.7	(0.7)	(0.6)	
Korean Stock Exch.	KOSPI Index	2,670.7	0.4	(10.3)	
Straight Times	FSSTI Index	3,232.0	0.2	3.5	
Kuala Lumpur	KLCI Index	1,537.8	(0.8)	(1.9)	
Philippines	PCOMP Index	6,741.4	0.8	(5.4)	
Nikkei	NKY Index	27,761.6	1.3	(3.6)	
Hang Seng	HSI Index	21,082.1	(1.0)	(9.9)	
MSCI-Asia pacific	MXAP Index	168.1	(0.6)	(13.0)	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,248.3	1.3	(8.5)	
S&P 500	SPX Index	4,176.8	1.8	(12.4)	
Nasdaq	CCMP Index	12,316.9	2.7	(21.3)	
FTSE 100	UKX Index	7,533.0	(1.0)	2.0	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,438.0	0.3	(1.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,519.2	(0.2)	1.8
3 month	IDSWT3M Index	14,497.0	(0.7)	(1.6)
6 month	IDSWT6M Index	14,510.0	(0.6)	(1.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,514.0	(0.6)	(1.5)
6 month	IDFWT6M Index	14,552.0	(0.7)	(1.2)
				(2.8)

*price as of 6/3/2022


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