

FOR PROFESSIONAL INVESTORS - 10/13/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Decline

JCI slightly weakened and closed at 6,909 (-30 points or -0.43%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 209Bn today and rupiah was stabilized at IDR 15,358/USD.

Banking stocks were mixed as BMRI (+1.34%) and BBCA (+0.91%) rose, while MEGA (-1.38%), BBNI (-0.57%), and BBRI (-0.68%) down. Consumer names were mixed as KLBF (+3.54%) and UNVR (+1.27%) closed higher, while GGRM (-1.87%), INDF (-0.82%), and SIDO (-5.71%) corrected. Retailer stocks were mixed as AMRT (+2.14%) and MAPI (+3.03%) closed higher, while ACES (-6.84%) and LPPF (-6.9%) declined. Poultry names were negative as MAIN (-3.36%), JPFA (-1.04%), and CPIN (-0.9%) all retreated. Other movers were STTP (+4.48%), BUMI (+3.66%), PNLF (-4.84%), and EMTK (-4.6%).

Indonesia exported 4.33m tonnes of palm oil products in Aug-22, higher compared to 2.71m tonnes in Jul-22. Export and consumption has trended up, thus cutting stocks to 4.04m tonnes compared to 5.91m tonnes in Jul-22.

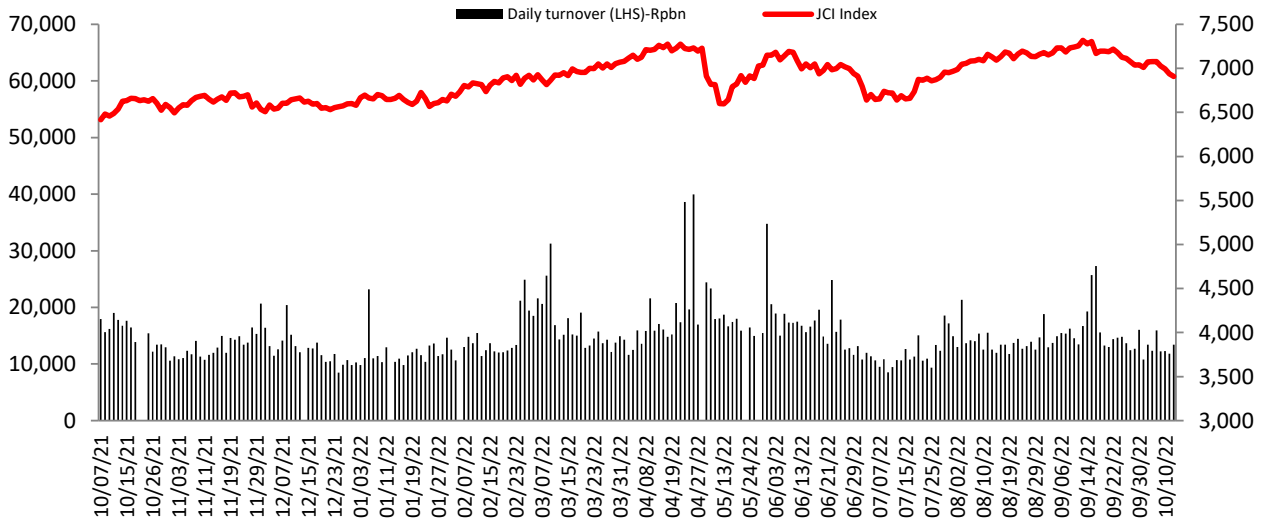
BOND MARKET

MIXED TRADING

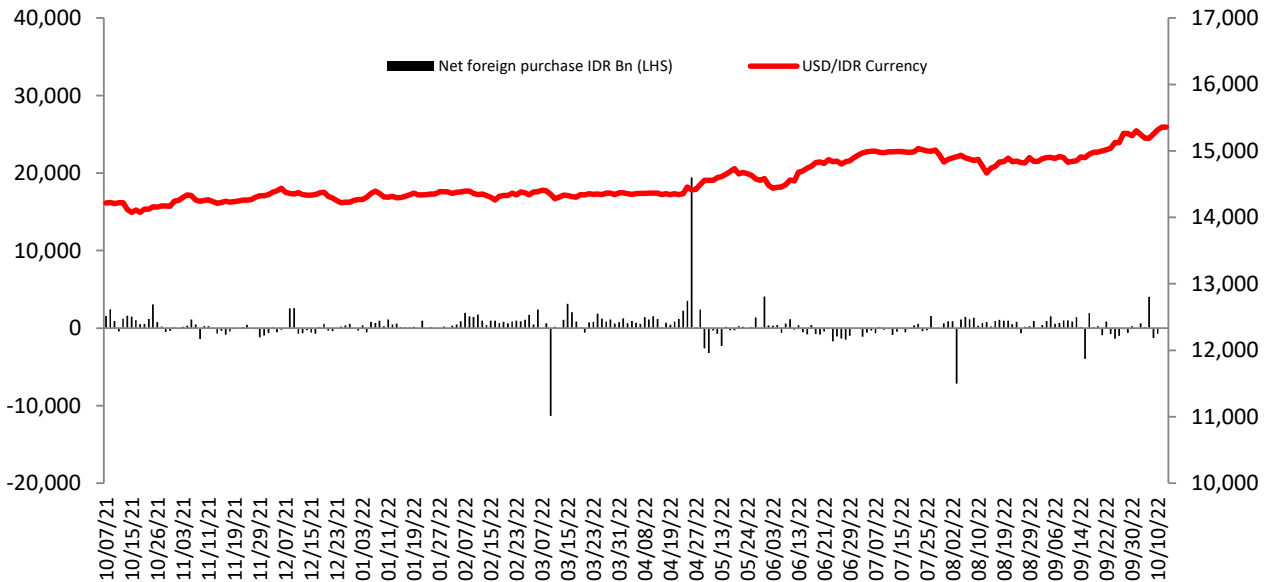
IndoGB bond market seen mixed trading following the news of BoE's plan to end bond purchases this weekend. Better sentiment seen in the morning session with buying interest mostly still on benchmark series. However the good sentiment was short-lived due to the uncertainties surrounding BoE's plan. Bids turned defensive in the afternoon session. Overall yield curve closed mixed with benchmark series of 5/10/15/20Y closed at mid yield 6.92%/7.34%/7.25%/7.31%. Market now awaits the US CPI data release on Thursday night.

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	93.3	(0.1)	(7.6)	5Y
FR82	FR0082 Govt	93.4	(0.0)	(7.3)	10Y
FR80	FR0080 Govt	92.1	(0.2)		15Y
FR83	FR0083 Govt	98.1	(0.1)	(4.4)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,909.2	(0.4)	5.0	
Thailand	SET Index	1,559.7	(0.2)	(5.9)	
Korean Stock Exch.	KOSPI Index	2,202.5	0.5	(26.0)	
Straight Times	FSSTI Index	3,090.4	(0.5)	(1.1)	
Kuala Lumpur	KLCI Index	1,380.6	(0.5)	(11.9)	
Philippines	PCOMP Index	5,853.6	0.1	(17.8)	
Nikkei	NKY Index	26,396.8	(0.0)	(8.3)	
Hang Seng	HSI Index	16,701.0	(0.8)	(28.6)	
MSCI-Asia pacific	MXAP Index	137.7	(2.2)	(28.7)	
<u>Global Indices</u>					
Dow Jones	INDU Index	29,239.2	0.1	(19.5)	
S&P 500	SPX Index	3,588.8	(0.7)	(24.7)	
Nasdaq	CCMP Index	10,426.2	(1.1)	(33.4)	
FTSE 100	UKX Index	6,905.3	0.3	(6.5)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,358.0	0.0	(7.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,365.0	0.5	7.8
3 month	IDSWT3M Index	15,364.8	0.4	(7.6)
6 month	IDSWT6M Index	15,369.0	0.4	(7.7)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,372.1	0.3	(7.5)
6 month	IDFWT6M Index	15,433.0	0.5	(7.3)
			(0.3)	(7.3)

*price as of 10/12/2022

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