

FOR PROFESSIONAL INVESTORS - 04/09/2020

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### SLIGHT REBOUND

JCI slightly strengthened and closed at 4,649 (+22 points or +0.48%) today. Shares across regional market mostly climbed ahead of Easter holiday, with oil rose after Russia was signaling readiness to cut output. Meanwhile, foreign investors recorded net outflow on 9th day of IDR 514Bn today and rupiah advanced to IDR 15,880/USD.

Banking stocks were mostly negative as BBNI (-0.5%), BBRI (-1.06%), BMRI (-2.1%), and BBCA (-0.71%) all down. Consumer names were positive as HMSP (+3.43%), ICBP (+5.21%), UNVR (+1.75%), GGRM (+1.76%), and INDF (+2%) all closed higher. Properties stocks were positive as PWON (+6.32%), CTRA (+8.85%), BSDE (+5.63%), and LPKR (+3.52%) all inched higher. Similar trend also happened for material names with BRPT (+2.16%) and TPIA (+1.37%) both up. Other movers were MNCN (+8.74%), TBIG (+7.95%), TCPI (-6.8%), and SILO (-6.58%).

The Pre-Work Card program will be launched online today, 9 April, for people affected by COVID-19 outbreak. The government opens opportunities to 5.6mn people where each participant will receive benefits of Rp3.6 mn for skilling, upskilling, and reskilling. After the pandemic is completed, the benefits received will return to Rp650 k per person.

### BOND MARKET

#### BETTER SENTIMENT

Indonesia bond market closed the week in positive tone thanks to oils talks news. After bond market opened in wide spread, market players was seen biddish throughout the day inline with rupiah strengthened to below 16,000. Some local players was heard collecting in belly curve. Overall bonds yield closed lower by 8 - 13 bps today. In the next Tuesday, MoF will raised the auction target to IDR 20tn from IDR 15tn, with maximum issued IDR 40tn.

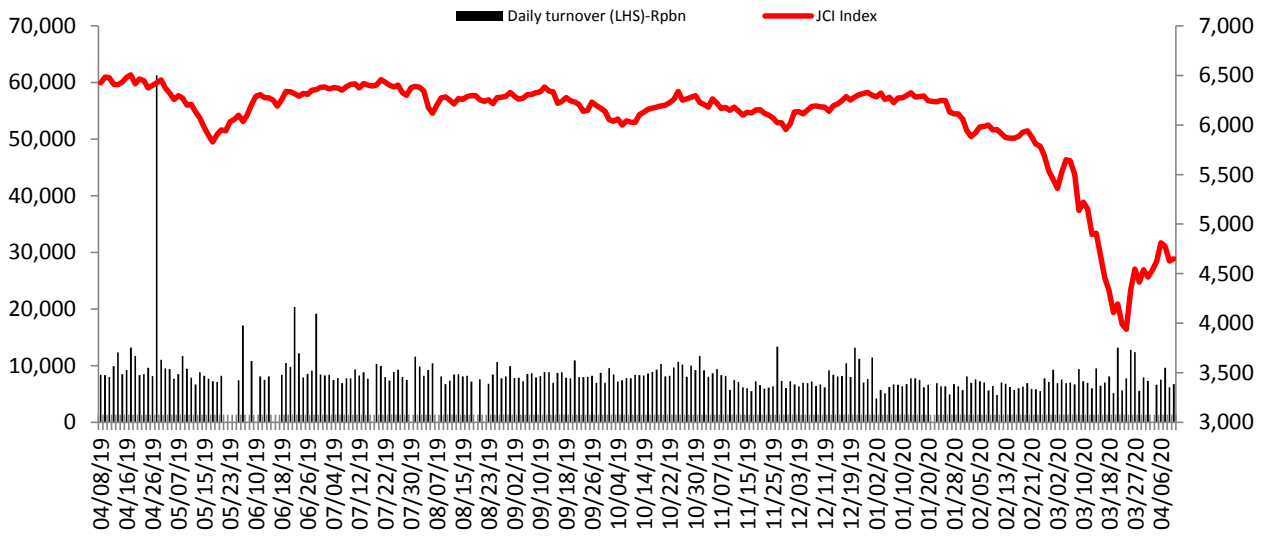


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ASSET MANAGEMENT

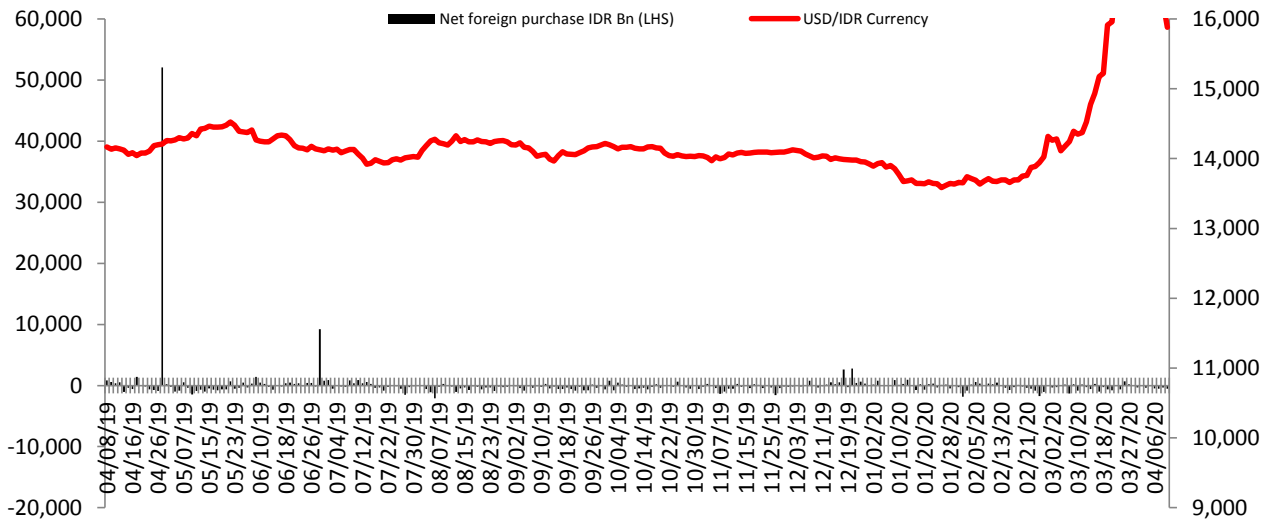
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# GRAPHS & TABLES

## JCI & DAILY TURNOVER



## IDR & NET FOREIGN PURCHASES



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	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	95.7	0.3	(4.8)	5Y
FR82	FR0082 Govt	93.2	0.8	(6.4)	10Y
FR80	FR0080 Govt	93.6	0.1	(6.8)	15Y
FR83	FR0083 Govt	92.5	0.2	(7.1)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	4,649.1	0.5	(26.2)	
Thailand	SET Index	1,210.5	0.4	(23.4)	
Korean Stock Exch.	KOSPI Index	1,836.2	1.6	(16.4)	
Straight Times	FSSTI Index	2,571.3	1.3	(20.2)	
Kuala Lumpur	KLCI Index	1,369.8	0.6	(13.8)	
Philippines	PCOMP Index	5,510.8	(2.5)	(29.5)	
Nikkei	NKY Index	19,345.8	(0.0)	(18.2)	
Hang Seng	HSI Index	24,300.3	1.4	(13.8)	
MSCI-Asia pacific	MXAP Index	139.7	0.1	(18.2)	
<u>Global Indices</u>					
Dow Jones	INDU Index	23,433.6	3.4	(17.9)	
S&P 500	SPX Index	2,750.0	3.4	(14.9)	
Nasdaq	CCMP Index	8,090.9	2.6	(9.8)	
FTSE 100	UKX Index	5,753.2	1.3	(23.7)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	15,880.0	2.3	(12.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,334.6	(0.8)	16.8
3 month	IDSWT3M Index	16,308.6	(0.5)	(17.6)
6 month	IDSWT6M Index	16,380.0	(0.3)	(18.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,291.5	(1.4)	(16.8)
6 month	IDFWT6M Index	16,441.8	(2.7)	(15.9)
<u>Indonesia Bond Index</u>				
BBG Sov ID Index*	BINDO Index	247.6	(0.1)	(3.8)

\*price as of 4/8/2020

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