



FOR PROFESSIONAL INVESTORS - 01/31/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### DOWN

JCI slightly weakened and closed at 6,631 (-14 points or -0.22%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR 108Bn today and rupiah was stabilized at IDR 14,383/USD.

Banking stocks were negative as BBTN (-2.59%), BBNI (-2.33%), BMRI (-2.29%), BBRI (-1.69%), and BBKA (-1.93%) all down. Consumer names were mostly negative as HMSP (-0.53%), INDF (-0.78%), UNVR (-0.49%), and KLBF (-1.8%) all closed lower, except ICBP (+0.58%). Material stocks were positive as TPIA (+2.92%) and BRPT (+1.71%) all rose. Retailer names were mixed as MAPI (+4%) and MAPA (+4.39%) inched higher, while ACES (-1.98%) and AMRT (-3.32%) down. Other movers were CMPP (+22.7%), IPTV (+21.62%), ASSA (-6.76%), and ITMG (-3.99%).

Ministry of Transport is committed to implement the zero over dimension over load (ODOL) policy starting 1 January 2023. With that, the ceramic industry association (Asaki) is requesting incentives from gov't to the ceramic industry is the policy is to be implemented.

### BOND MARKET

#### SMALL ACTIVITY

Indonesia bond market started the week firmer today. In general direction was bullish. Buying activity was mainly done by onshore foreign names from middle to long tenors. The 5Y/10Y/15Y/20Y benchmark closed the day at mid yield of 5.21%/6.42%/6.42%/6.89%. Tomorrow will be closed for Chinese New Year

There will be fresh supply on Wednesday, Feb 02nd as Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 25Tn issuance target. In the previous conventional auction, incoming bids reached IDR 84.84Tn and DMO issued IDR 25Tn.

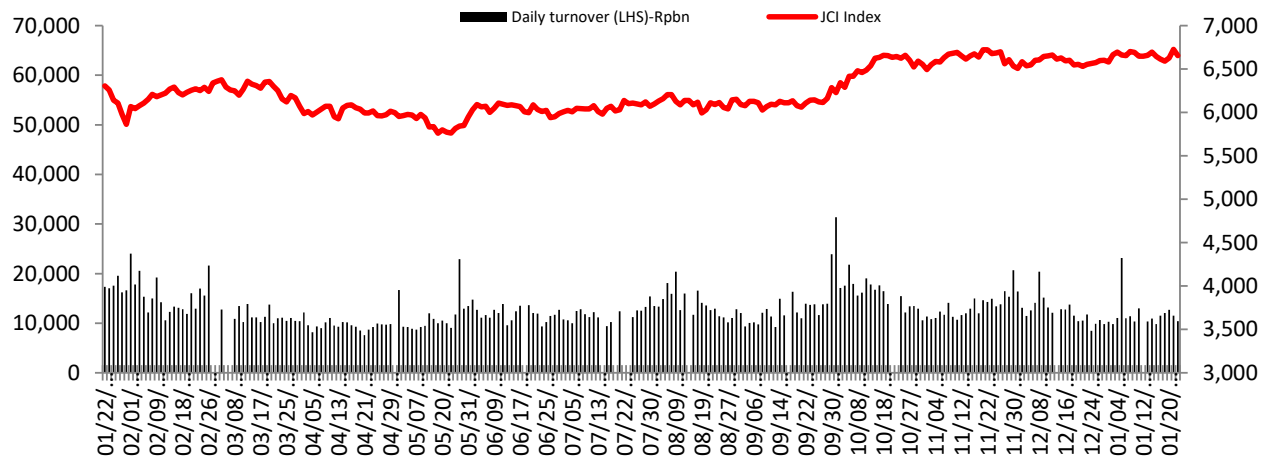


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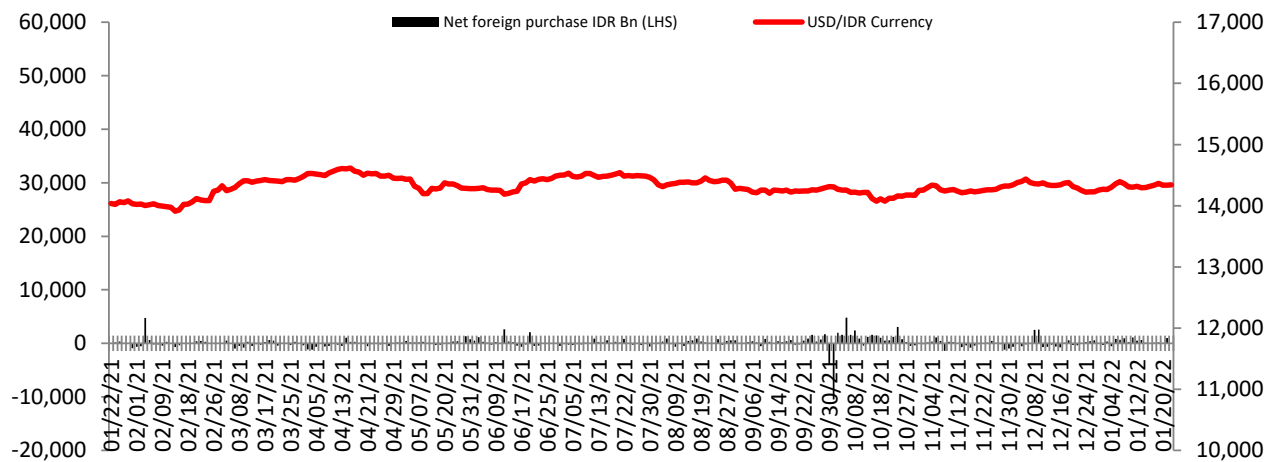
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## GRAPHS & TABLES

### 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	99.6	0.1	(1.3)	5Y
FR82	FR0082 Govt	99.6	0.2	(1.1)	10Y
FR80	FR0080 Govt	99.7	0.1		15Y
FR83	FR0083 Govt	102.1	0.3	(0.5)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,631.2	(0.2)	0.8	
Thailand	SET Index	1,648.8	0.6	(0.5)	
Korean Stock Exch.	KOSPI Index	2,663.3	1.9	(10.6)	
Straight Times	FSSTI Index	3,249.6	0.1	4.0	
Kuala Lumpur	KLCI Index	1,512.3	(0.5)	(3.5)	
Philippines	PCOMP Index	7,361.7	1.5	3.4	
Nikkei	NKY Index	27,002.0	1.1	(6.2)	
Hang Seng	HSI Index	23,802.3	1.1	1.7	
MSCI-Asia pacific	MXAP Index	182.8	0.7	(5.3)	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,725.5	1.7	(4.4)	
S&P 500	SPX Index	4,431.9	2.4	(7.0)	
Nasdaq	CCMP Index	13,770.6	3.1	(12.0)	
FTSE 100	UKX Index	7,470.0	0.1	1.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,383.0	0.0	(0.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,390.1	0.0	0.9
3 month	IDSWT3M Index	14,376.2	(0.1)	(0.7)
6 month	IDSWT6M Index	14,380.7	(0.0)	(0.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,390.4	0.1	(0.6)
6 month	IDFWT6M Index	14,508.4	0.5	(0.9)

\*price as of 1/28/2022


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