



FOR PROFESSIONAL INVESTORS - 03/29/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### ADJUSTED DOWN

JCI slightly weakened and closed at 6,167 (-29 points or -0.46%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 46Bn today and rupiah slightly weakened to IDR 14,445/USD.

Banking stocks were negative as BBTN (-2.44%), PNBK (-2.69%), BDMN (-3.07%), BMRI (-0.78%), and BBKA (-0.86%) all down. Consumer names were mostly positive as UNVR (+1.89%), ICBP (+1.37%), GGRM (+0.97%), and MYOR (+1.11%) all in green, except KLBF (-2.53%). Mining stocks were negative as INDY (-3.13%), ADRO (-1.23%), TINS (-6.29%), INCO (-2.99%), and ANTM (-7%) all retreated. Construction names were negative as PTPP (-1.34%), ADHI (-3.28%), WIKA (-2.17%), and WSKT (-6.67%) all corrected. Other movers were CENT (+7.58%), BRPT (+6.35%), TCPI (-4.68%), and TLKM (-2.29%).

Government decided to ban homecoming activities this year. Ministry of Transportation will immediately prepare transportation control regulations for Eid Fitr Holiday.

### BOND MARKET

#### QUIET MARKET

Indonesia bond prices opened the week slightly lower with 10 UST yield touched 1.67%. Nothing much happened in the bond market today. Potential of additional supply tomorrow hindered bidders from putting aggressive. Limited activities remained focus on 5Y and 10Y area while the other part of the yield curve was quoted within range throughout the day. From our side we heard trade done in 5Y FR86 which was given at 98.65 (5.93%) and 10Y FR87 traded at 98.55 (6.7%).

There will be fresh supply tomorrow as Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 30Tn issuance target. The series that will be issued are 3M SPN, 1Y SPN, 5Y FR86, 10Y FR87, 15Y FR88, 20Y FR83 and 30Y FR89. In the previous conventional auction, incoming bids reached IDR 40.085Tn and DMO issued IDR 18.90Tn

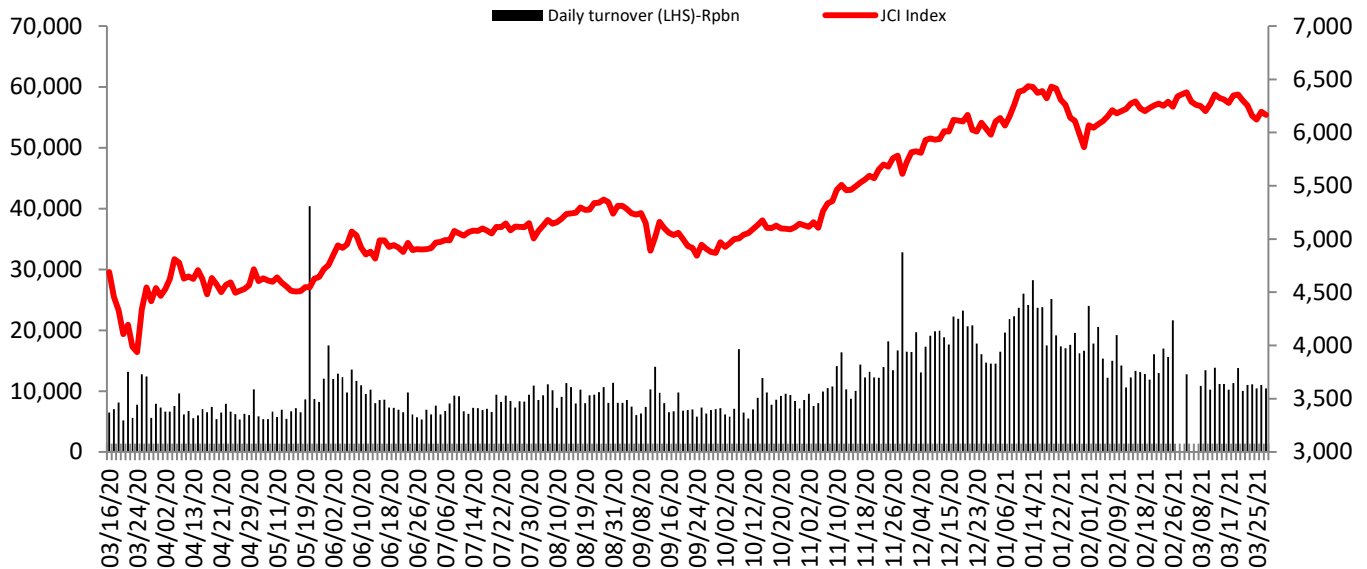


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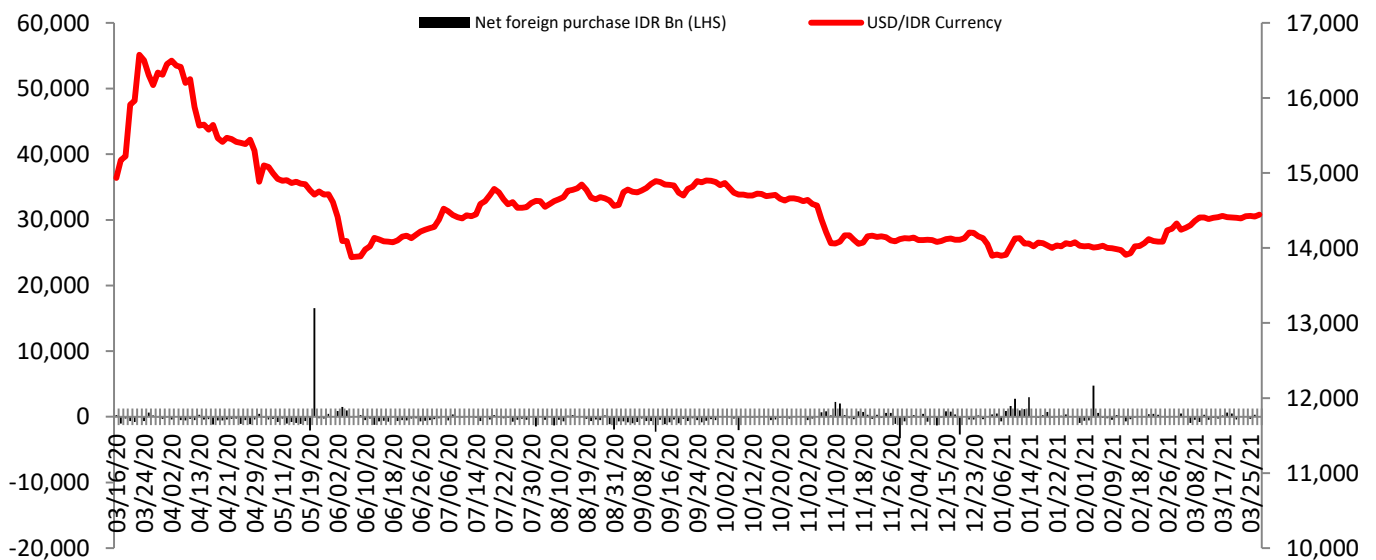
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## GRAPHS & TABLES

### 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	98.6	(0.1)	(3.1)	5Y
FR82	FR0082 Govt	98.5	(0.1)	(6.0)	10Y
FR80	FR0080 Govt	96.8	(0.1)		15Y
FR83	FR0083 Govt	100.3	(0.2)	(9.4)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,166.8	(0.5)	3.1	
Thailand	SET Index	1,583.9	0.6	9.3	
Korean Stock Exch.	KOSPI Index	3,036.0	(0.2)	5.7	
Straight Times	FSSTI Index	3,175.6	0.6	11.7	
Kuala Lumpur	KLCI Index	1,611.3	0.6	(1.0)	
Philippines	PCOMP Index	6,607.8	1.0	(7.5)	
Nikkei	NKY Index	29,384.5	0.7	7.1	
Hang Seng	HSI Index	28,338.3	0.0	4.1	
MSCI-Asia pacific	MXAP Index	204.8	1.3	2.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,072.9	1.4	8.1	
S&P 500	SPX Index	3,974.5	1.7	5.8	
Nasdaq	CCMP Index	13,138.7	1.2	1.9	
FTSE 100	UKX Index	6,740.6	(0.0)	4.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,445.0	(0.2)	(2.7)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,445.0	(0.0)	2.5
3 month	IDSWT3M Index	14,441.4	(0.1)	(2.5)
6 month	IDSWT6M Index	14,445.2	(0.0)	(2.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,477.0	(0.1)	(2.2)
6 month	IDFWT6M Index	14,597.0	0.2	(1.3)
				(2.3)

\*price as of 3/26/2021



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