



FOR PROFESSIONAL INVESTORS - 10/21/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

### EQUITY MARKET

#### HIGHER

JCI advanced and closed at 6,981 (+120 points or +1.75%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net inflow of IDR 873Bn today and rupiah slightly weakened to IDR 15,573/USD.

Banking stocks were positive as BMRI (+4.49%), BBKA (+2.72%), BBRI (+2.09%), BBNI (+2.56%), and BBTN (+5.14%) all advanced. Consumer names were positive as MYOR (+13%), KLBF (+2.53%), ICBP (+4.11%), GGRM (+8.46%), and INDF (+2.01%) all rose. Mining stocks were positive as ADRO (+4.17%), ITMG (+3.7%), PTBA (+2.68%), INDY (+5.16%), and TINS (+7.31%) all inched higher. Telco names were positive as TLKM (+3.57%), EXCL (+2.81%), and ISAT (+1.58%) all in green. Other movers were BIPI (+10.07%), BUMI (+6.59%), STTP (-6.15%), and ACES (-5.66%).

The Health Ministry of Indonesia temporarily halts all sales of syrup and liquid medicine following the deaths of nearly 100 children and an unexplained spike in cases of acute kidney injuries. The ban will stay in place until officials finish investigation into unregistered medical syrups suspected of containing toxic ingredients.

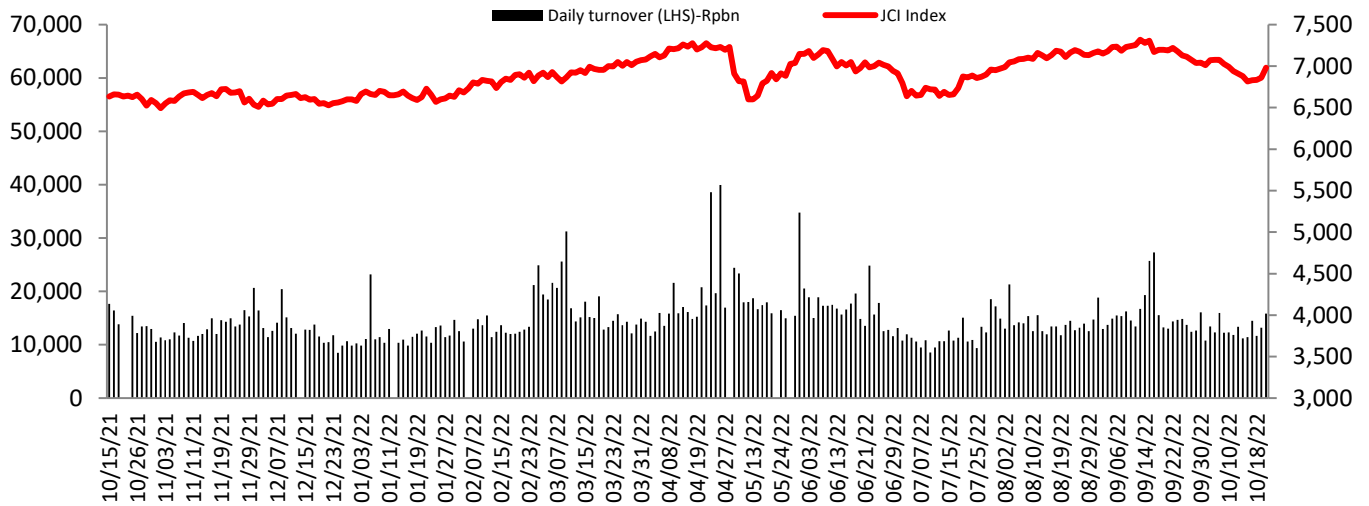
### BOND MARKET

#### DIP LOWER

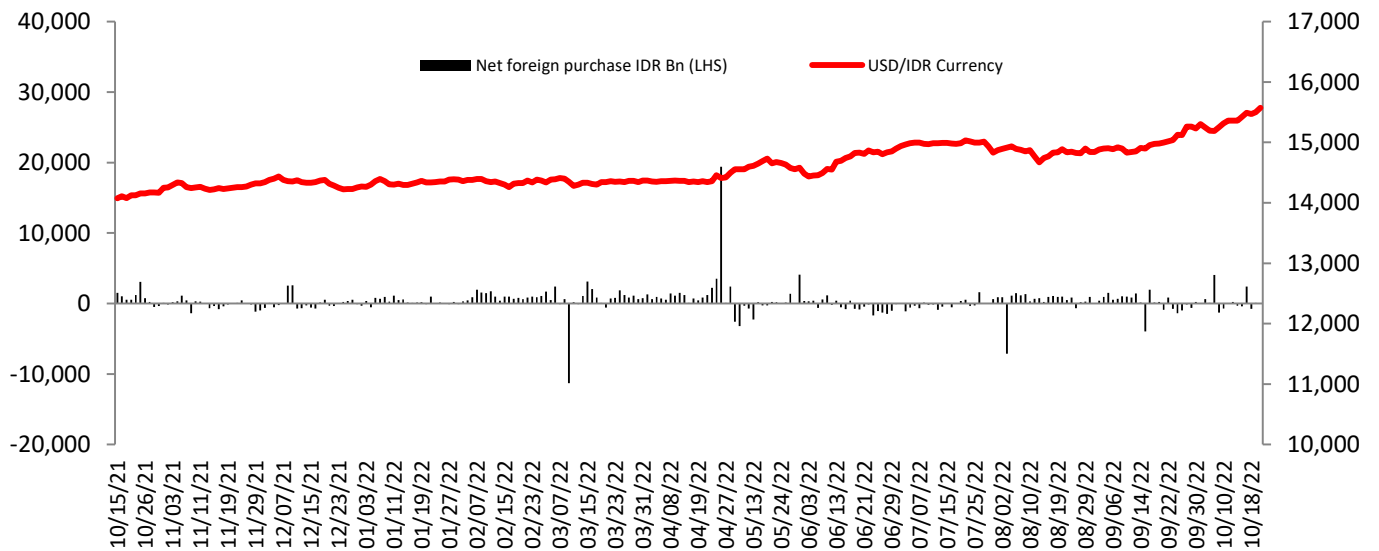
IDR bonds moved lower today post BI rate hike yesterday and higher UST movement overnight. Selling interest was seen throughout the day led by front end series in which BI suspected on the sell side. The 5Y FR90 was seen traded at 91.6 (7.36%), a big jump on the yield as yesterday the series were traded at 7.15% level. Meanwhile, 10Y FR91 was traded to as low as 91.6 (7.63%) while 11Y FR96 seen traded at 95.75 (7.60%). After London market opened, UST yield tracked higher which did not help the sell-off in INDOGB market. Overall yield curve went up around 5 to 20 bps compared to yesterday level. The benchmark series of 5Y/10Y/15Y/20Y closed the week at mid yield 7.35%/7.62%/7.65%/7.64%.

# 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	92.4	(0.2)	(8.4)	5Y
FR82	FR0082 Govt	92.5	(0.4)	(8.2)	10Y
FR80	FR0080 Govt	90.0	(0.5)		15Y
FR83	FR0083 Govt	96.3	(0.2)	(6.1)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,980.7	1.8	6.1	
Thailand	SET Index	1,593.1	0.3	(3.9)	
Korean Stock Exch.	KOSPI Index	2,218.1	(0.9)	(25.5)	
Straight Times	FSSTI Index	3,022.7	(0.0)	(3.2)	
Kuala Lumpur	KLCI Index	1,437.7	1.6	(8.3)	
Philippines	PCOMP Index	6,056.0	(1.5)	(15.0)	
Nikkei	NKY Index	27,007.0	(0.9)	(6.2)	
Hang Seng	HSI Index	16,280.2	(1.4)	(30.4)	
MSCI-Asia pacific	MXAP Index	137.4	(1.1)	(28.9)	
<u>Global Indices</u>					
Dow Jones	INDU Index	30,423.8	(0.3)	(16.3)	
S&P 500	SPX Index	3,695.2	(0.7)	(22.5)	
Nasdaq	CCMP Index	10,680.5	(0.9)	(31.7)	
FTSE 100	UKX Index	6,915.3	(0.1)	(6.4)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,573.0	(0.5)	(8.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,472.0	0.0	8.5
3 month	IDSWT3M Index	15,493.7	0.2	(8.5)
6 month	IDSWT6M Index	15,484.9	0.1	(8.5)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,511.5	0.2	(8.4)
6 month	IDFWT6M Index	15,578.1	0.1	(8.3)
			(0.3)	(8.5)

\*price as of 10/20/2022

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