

FOR PROFESSIONAL INVESTORS - 01/17/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Foreign Inflow

JCI advanced and closed at 6,767 (+79 points or +1.19%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 21Bn today and rupiah weakened to IDR 15,165/USD.

Banking stocks were positive as BMRI (+4.84%), BBKA (+2.15%), BBRI (+0.88%), BBNI (+1.71%), and MEGA (+1.4%) all rose. Consumer names were mixed as INDF (+1.87%), KLBF (+0.49%), and GGRM (+1.48%) in green, while UNVR (-0.21%) and ICBP (-0.48%) corrected. Mining stocks were positive as ANTM (+4.13%), ADRO (+1.29%), INCO (+2.01%), ITMG (+1.35%), and TINS (+5.28%) all inched higher. Telco names were positive as TLKM (+2.6%), FREN (+1.49%), and EXCL (+0.44%) all in green. Other movers were MDKA (+5.22%), MEDC (+4.37%), FILM (-6.92%), and GOOD (-3.95%).

The Central Bureau of Statistics (BPS) stated that the number of poor people in Indonesia reached 26.36mn people in September 2022, an increase of 0.29mn people compared to March 2022.

BOND MARKET

AUCTION DAY

Indonesia bond market opened weaker with wide spread today. Bond prices went down slightly in the morning session as Rupiah weakening to 15,130-140 level. Post incoming bid auction released, we heard several sporadic activity especially on 5Y – 10Y areas. The mixed sentiment still continue throughout the day. Overall the yield closed the day higher by around 1 – 3 bps. In today auction, MoF managed to issued IDR 23Tn (initial target: IDR 23Tn). The series absorbed (against incoming bids) on the auction were IDR 1Tn (IDR 2.23Tn) 3mo SPN, IDR 2Tn (IDR 6.393Tn) 12mo SPN, IDR 7.15Tn (IDR 22.591Tn) 5Y FR95, IDR 9.15Tn (IDR 19.324Tn) 10Y FR96, IDR 0.95Tn (IDR 2.676Tn) 15Y FR98, IDR 0.75Tn (IDR 2.738Tn) 20Y FR97 and IDR 2Tn (IDR 3.095Tn) 30Y FR89 at weighted average yields of 4.53%, 5.45%, 6.48%, 6.79%, 6.86%, 6.9% and 7.19% respectively.

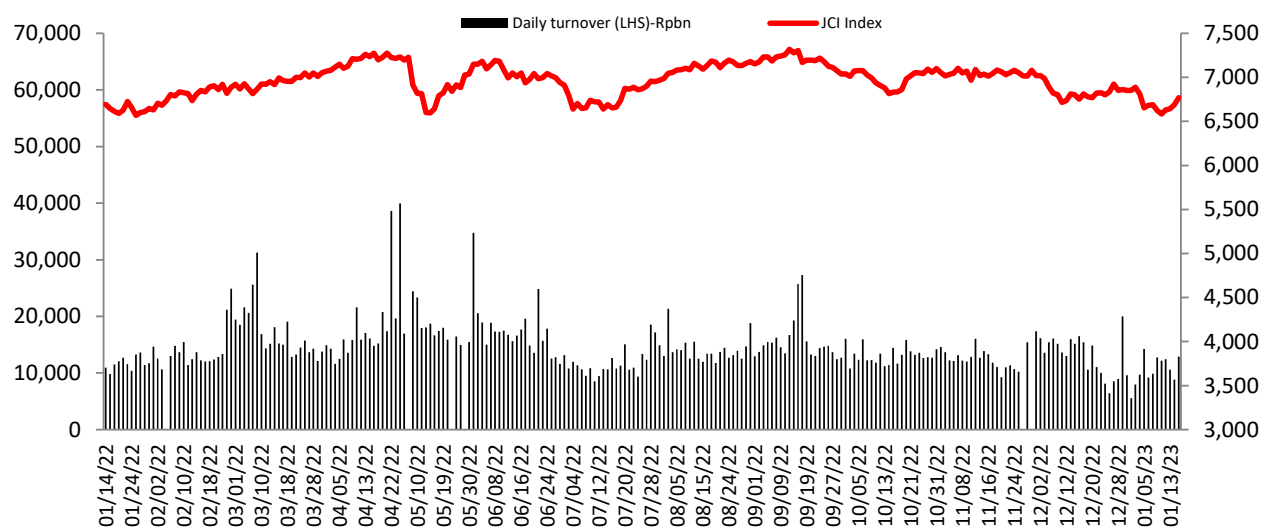


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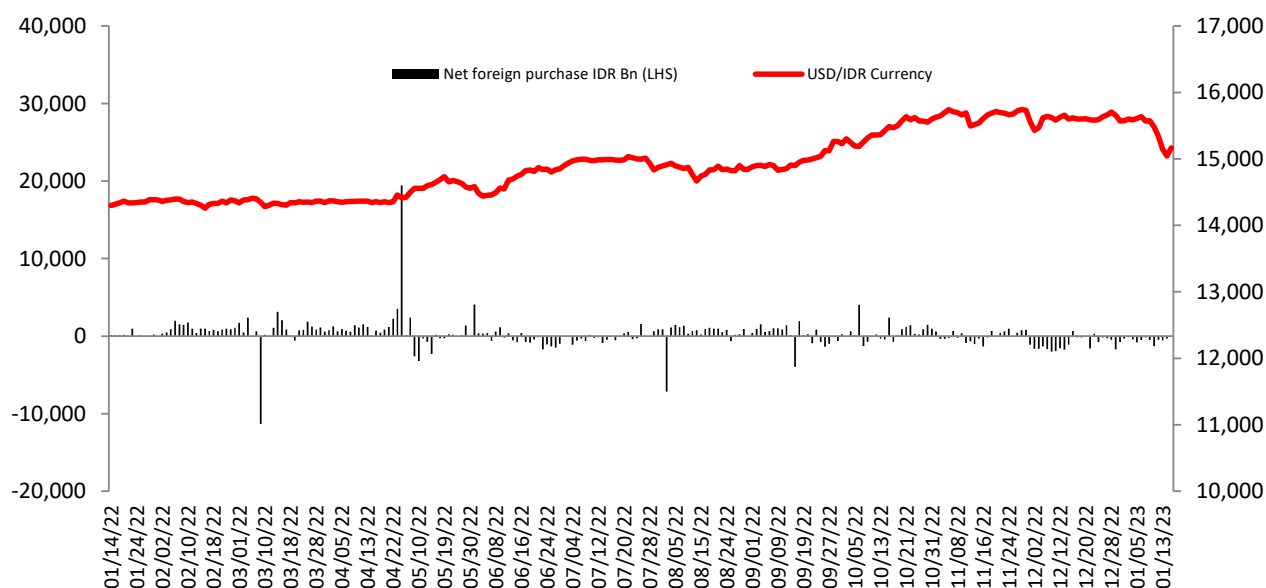
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GRAPHS & TABLES

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	96.4	0.0	0.2	5Y
FR82	FR0082 Govt	97.8	(0.2)	1.5	10Y
FR80	FR0080 Govt	94.8	0.0	(1.7)	15Y
FR83	FR0083 Govt	102.0	(0.2)	1.7	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,767.3	1.2	(1.2)	
Thailand	SET Index	1,681.8	(0.2)	0.8	
Korean Stock Exch.	KOSPI Index	2,379.4	(0.9)	6.4	
Straight Times	FSSTI Index	3,277.9	(0.2)	0.8	
Kuala Lumpur	KLCI Index	1,499.4	0.4	0.3	
Philippines	PCOMP Index	7,014.0	(0.4)	6.8	
Nikkei	NKY Index	26,138.7	1.2	0.2	
Hang Seng	HSI Index	21,577.6	(0.8)	9.1	
MSCI-Asia pacific	MXAP Index	165.7	(0.3)	6.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,302.6	0.3	3.5	
S&P 500	SPX Index	3,999.1	0.4	4.2	
Nasdaq	CCMP Index	11,079.2	0.7	5.9	
FTSE 100	UKX Index	7,852.0	(0.1)	5.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,165.0	(0.8)	2.7
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,145.0	(2.7)	(3.7)
3 month	IDSWT3M Index	15,016.3	(1.0)	3.6
6 month	IDSWT6M Index	15,329.5	(1.5)	1.6
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,024.0	(0.9)	3.5
6 month	IDFWT6M Index	15,197.7	(2.6)	2.9

*price as of 1/17/2023


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