



FOR PROFESSIONAL INVESTORS - 04/09/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

FLAT

JCI was flat and closed at 6,070 (-2 points or -0.02%) today. Shares across regional markets were mostly negative. Meanwhile, foreign investors recorded net outflow of IDR 33Bn today and rupiah slightly weakened to IDR 14,565/USD.

Banking stocks were mostly positive as BMRI (+3.19%), BBKA (+1.06%), BBNI (+3.45%), and BBTN (+2.36%) all advanced, except MEGA (-0.85%). Consumer names were mixed as MYOR (+4.74%), GGRM (+2.7%), and ICBP (+0.85%) up, while KLBF (-0.96%) and UNVR (-1.89%) corrected. Mining stocks were negative as INDY (-2.94%), TINS (-2.78%), ADRO (-2.03%), INCO (-4.15%), and ANTM (-5.26%) all corrected. Pulp & paper names were negative as TKIM (-6.81%) and INKP (-5.84%) all down. Other movers were MPPA (+24.47%), FILM (+24.27%), POLL (-6.8%), and AMRT (-2.01%).

Gov't prohibits the use and operation of all modes of transportation (air, sea, and land transport) except for logistic distribution purposes during the period of 6-17 Mei 2021 to support the "mudik" banned during Lebaran period. This is to curb Covid-19 cases from rising which usually happened post long holidays.

BOND MARKET

MIXED TONE

Indonesia bond market opened the day firmer with 10Y UST yield posted at 1.62%. In the morning session, buying interest was seen in front to end tenors from local names. However, the biddish tone did not sustain as 10Y UST yield flew higher to 1.66%. Several profit taking action was seen. Post the lunch time, INDOGB went quiet. The 5Y FR86/10Y FR87/15Y FR80/20Y FR83 closed the day at mid yield of 5.61%/6.43%/6.42%/7.19%

There will be fresh supply next week 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, 12M SPN, 5Y FR86, 10Y FR87, 15Y FR88, 20Y FR83 and 30Y FR89.

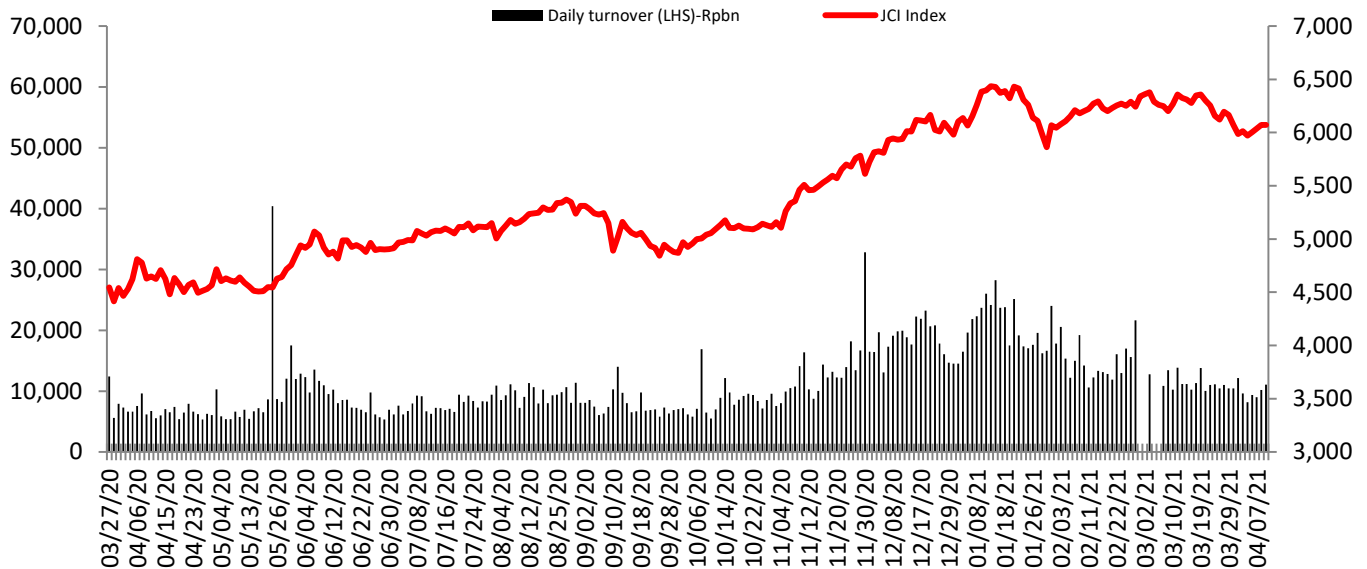


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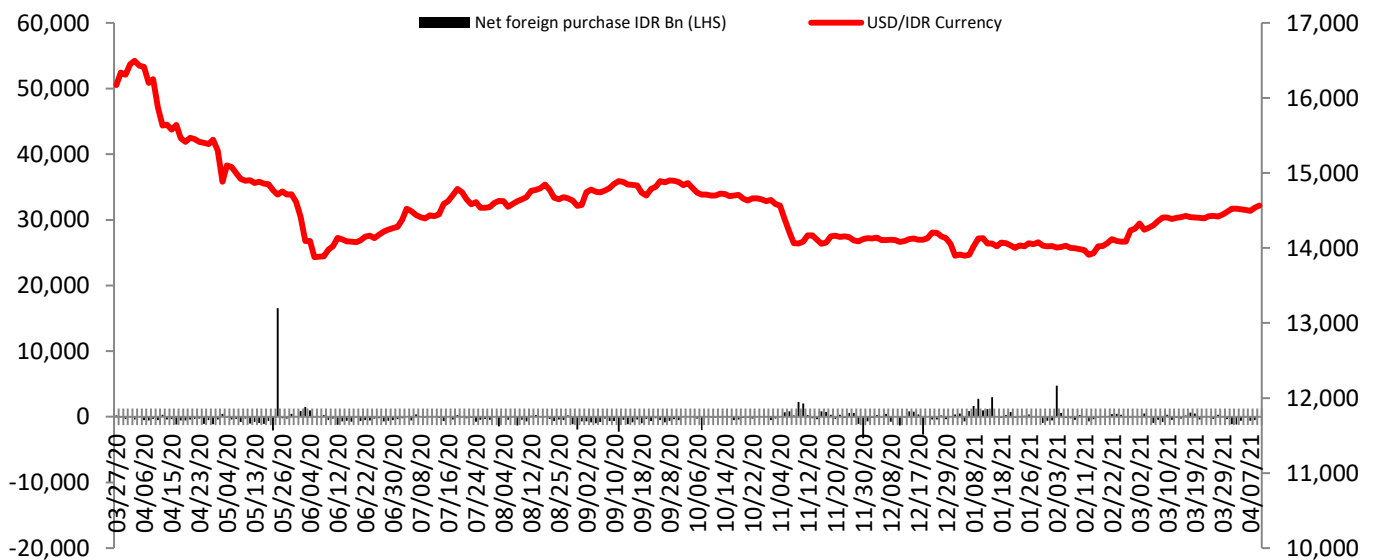
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GRAPHS & TABLES

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	99.5	0.1	(2.1)	5Y
FR82	FR0082 Govt	100.4	(0.1)	(4.1)	10Y
FR80	FR0080 Govt	98.4	0.4		15Y
FR83	FR0083 Govt	102.9	0.3	(7.1)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,070.2	(0.0)	1.5	
Thailand	SET Index	1,566.3	0.5	8.1	
Korean Stock Exch.	KOSPI Index	3,131.9	(0.4)	9.0	
Straight Times	FSSTI Index	3,184.5	(0.1)	12.0	
Kuala Lumpur	KLCI Index	1,612.3	0.6	(0.9)	
Philippines	PCOMP Index	6,545.2	(1.6)	(8.3)	
Nikkei	NKY Index	29,768.1	0.2	8.5	
Hang Seng	HSI Index	28,698.8	(1.1)	5.4	
MSCI-Asia pacific	MXAP Index	207.6	0.3	3.8	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,503.6	0.2	9.5	
S&P 500	SPX Index	4,097.2	0.4	9.1	
Nasdaq	CCMP Index	13,829.3	1.0	7.3	
FTSE 100	UKX Index	6,933.0	(0.1)	7.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,565.0	(0.2)	(3.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,567.0	0.4	3.4
3 month	IDSWT3M Index	14,578.1	0.4	(3.4)
6 month	IDSWT6M Index	14,570.7	0.4	(3.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,633.0	0.5	(3.3)
6 month	IDFWT6M Index	14,613.0	(0.5)	(1.4)
			(0.0)	(1.3)

*price as of 4/8/2021



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