

FOR PROFESSIONAL INVESTORS - 08/03/2022

DAILY REPORT INDONESIA MARKET WRAP

EQUITY MARKET

Closing Higher

JCI advanced and closed at 7,047 (+58 points or +0.84%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 892Bn today and rupiah slightly weakened to IDR 14,913/USD.

Banking stocks were mixed as BMRI (+0.92%), BBCA (+0.33%), and PNBN (+6.49%) advanced, while MEGA (-2.42%) and BBRI (-0.45%) closed lower. Consumer names were negative as UNVR (-0.22%), GGRM (-1.76%), SIDO (-3.16%), ICBP (-1.95%), and INDF (-1.87%) all weakened. Telco stocks were positive as TLKM (+1.12%), EXCL (+7.5%), and FREN (+8.33%) all closed higher. Material names were positive as BRPT (+4.19%) and TPIA (+0.27%) all advanced. Other movers were BBYB (+9.74%), BFIN (+6.96%), MAPI (-7%), and BUMI (-6.96%).

A total of 53 smelters are in construction in Indonesia with a total investment of USD21.5bn.

BOND MARKET

SLOW DAY

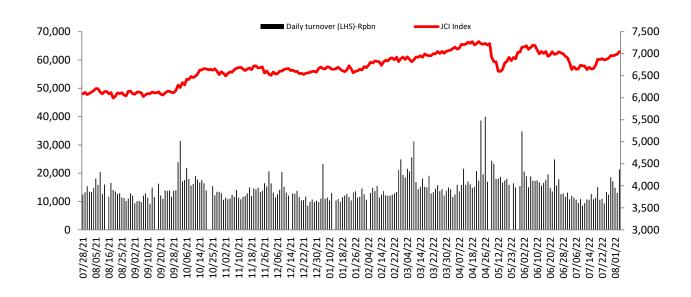
Indonesia bond market was calm today after yesterday government auction. Only few trades were seen in the morning session with light trading volume, while in the afternoon session market completely quiet. The overall market tone was mixed, no significant price action took place. IDR bond the prices ended the day unchanged from yesterday level. The yield of 5/10/15/20Y benchmark closed the day at mid-yield of 6.45%/7.21%/7%/7.22% respectively. Total foreign ownership went down to IDR 751.24Tn on Jul 29th 2022, from previously IDR 780.22Tn Jun 30th 2022. USDIDR spot closed higher at 14,910/920.

In today auction, MoF managed to upsize issuance to IDR 19.06Tn (initial target: IDR 15Tn). The series absorbed (against incoming bids) on the auction were IDR 0.3Tn (IDR 0.34Tn) 3mo SPN, IDR 2.4Tn (IDR 2.575Tn) 9mo SPN, IDR 4.3Tn (IDR 10.732Tn) 5Y FR90, IDR 11.15Tn (IDR 17.771Tn) 10Y FR91, IDR 0.15Tn (IDR 1.263Tn) 15Y FR93, IDR 0.75Tn (IDR 3.935Tn) 20Y FR92 and IDR 0.01Tn (IDR 0.297Tn) 30Y FR89 at weighted average yields of 2.3%, 3.3%, 6.42%, 7.17%, 6.87%, 7.25% and 7.35% respectively.

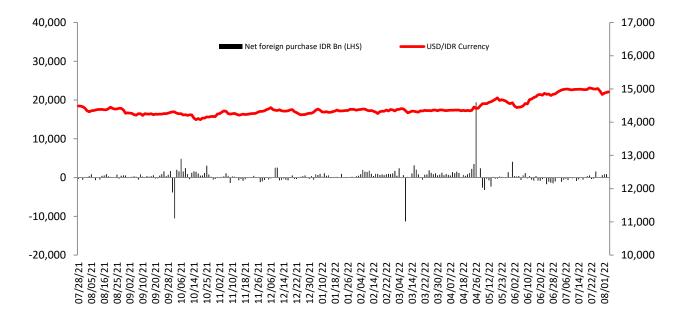


GRAPHS & TABLES

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	94.5	(0.1)	(6.3)	5Y
FR82	FR0082 Govt	94.2	(0.1)	(6.5)	10Y
FR80	FR0080 Govt	94.3	(0.2)		15Y
FR83	FR0083 Govt	98.8	(0.0)	(3.7)	20Y
Asia Pacific					
Jakarta Composite	JCI Index	7,046.6	0.8	7.1	
Thailand	SET Index	1,588.2	(0.1)	(4.2)	
Korean Stock Exch.	KOSPI Index	2,461.5	0.9	(17.3)	
Straight Times	FSSTI Index	3,253.5	0.4	4.2	
Kuala Lumpur	KLCI Index	1,486.7	(0.6)	(5.2)	
Philipines	PCOMP Index	6,430.1	1.1	(9.7)	
Nikkei	NKY Index	27,741.9	0.5	(3.6)	
Hang Seng	HSI Index	19,767.1	0.4	(15.5)	
MSCI-Asia pacific	MXAP Index	159.7	(1.3)	(17.3)	
Global Indices					
Dow Jones	INDU Index	32,396.2	(1.2)	(10.8)	
S&P 500	SPX Index	4,091.2	(0.7)	(14.2)	
Nasdaq	CCMP Index	12,348.8	(0.2)	(21.1)	
FTSE 100	UKX Index	7,396.5	(0.2)	0.2	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,913.0	(0.1)	(4.4)
Swap-IDR				
1 month	IDSWT1M Index	14,873.4	(1.0)	4.3
3 month	IDSWT3M Index	14,882.0	0.0	(4.3)
6 month	IDSWT6M Index	14,890.0	0.1	(4.4)
<u>Forward-IDR</u> 3 month	IDFWT3M Index	14,888.9	0.1	(4.1)
6 month	IDFWT6M Index	14,932.2	0.1	(3.8)
			(0.1)	(4.7)

*price as of 8/3/2022



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