



FOR PROFESSIONAL INVESTORS - 06/08/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Stronger

JCI advanced and closed at 6,666 (+47 points or +0.7%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 386Bn today and rupiah slightly weakened to IDR 14,895/USD.

Banking stocks were mostly positive as BBRI (+1.39%), BBCA (+0.27%), BBNI (+0.55%), and BDMN (+1.43%) all in green, except BBTN (-0.76%). Consumer names were mixed as UNVR (+0.66%), SIDO (+2.72%), and MYOR (+1.12%) inched higher, while INDF (-0.34%) and KLBF (-0.49%) down. Pulp & paper stocks were positive as INKP (+3.17%) and TKIM (+3.46%) all closed higher. Telco names were mixed as TLKM (+0.48%) and EXCL (+3.41%) inched higher, while ISAT (-0.85%) retreated. Other movers were BBHI (+13.39%), ARTO (+11.79%), SSMS (-4.18%), and ACES (-2.86%).

Ministry of Public Works' 2024 indicative budget at Rp128.2tn (-9% yoy). Up to this date, 2023 budget realization reached 23% or Rp32tn

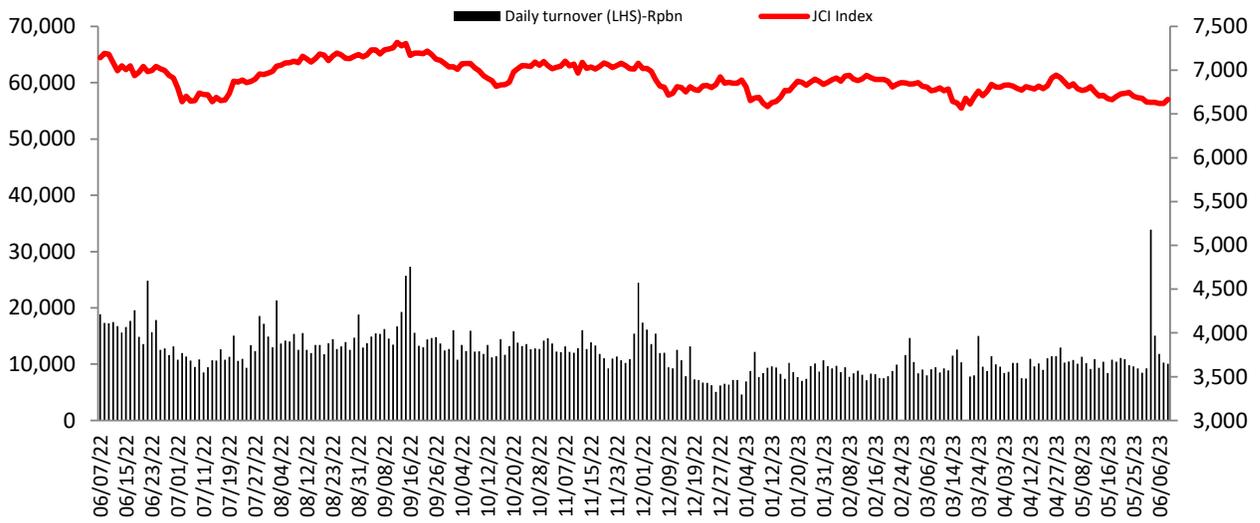
BOND MARKET

Softer

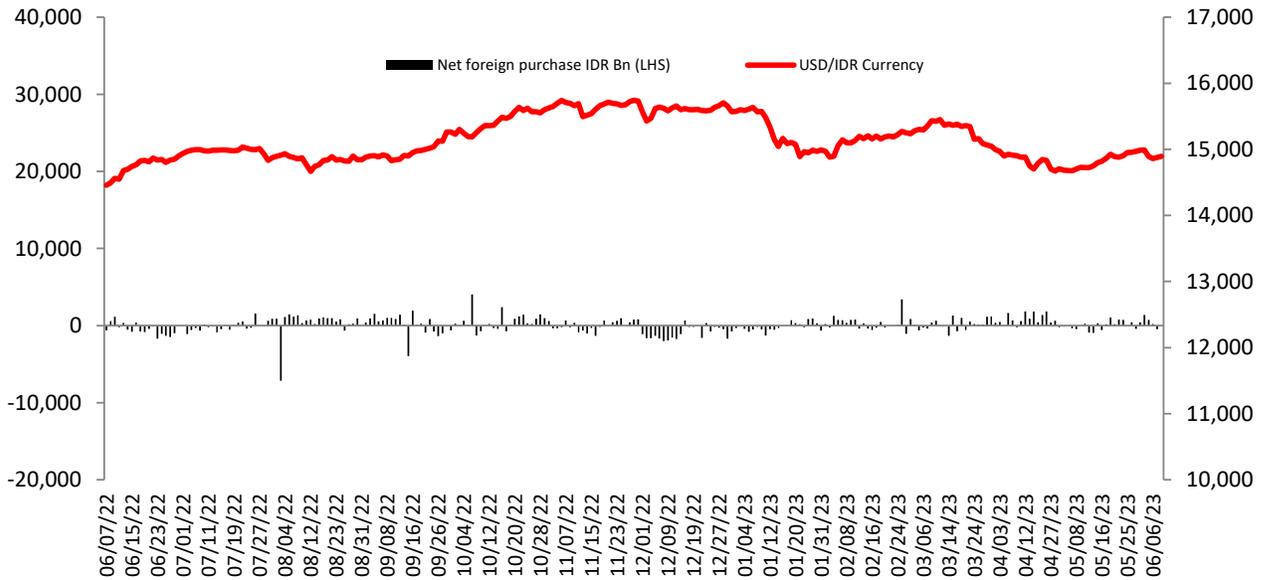
Indonesia bond market closed slightly weaker today on the back of UST yields spiked overnight after a surprised 25bps hike by Bank of Canada. In the morning session, market was pretty much mute and bonds remained rangy. Trading was more lively in the afternoon session as soon as London market opened. We heard some offshore players showing their appetite in 3Y – 4Y, while BI still showing their selling interest in the 4Y and 7Y. Market closed with yields overall up by 2 – 3 bps.

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	98.1	(0.1)	2.0	5Y
FR82	FR0082 Govt	100.1	0.0	3.9	10Y
FR80	FR0080 Govt	99.7	(0.1)	3.4	15Y
FR83	FR0083 Govt	104.4	0.1	4.1	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,666.3	0.7	(2.7)	
Thailand	SET Index	1,555.5	1.5	(6.8)	
Korean Stock Exch.	KOSPI Index	2,610.9	(0.2)	16.7	
Straight Times	FSSTI Index	3,186.6	0.2	(2.0)	
Kuala Lumpur	KLCI Index	1,374.6	(0.3)	(8.1)	
Philippines	PCOMP Index	6,539.4	(0.4)	(0.4)	
Nikkei	NKY Index	31,641.3	(0.9)	21.3	
Hang Seng	HSI Index	19,299.2	0.2	(2.4)	
MSCI-Asia pacific	MXAP Index	163.8	(0.1)	5.1	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,665.0	0.3	1.6	
S&P 500	SPX Index	4,267.5	(0.4)	11.1	
Nasdaq	CCMP Index	13,104.9	(1.3)	25.2	
FTSE 100	UKX Index	7,606.5	(0.2)	2.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,895.0	(0.1)	4.5
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,880.0	(0.0)	(5.4)
3 month	IDSWT3M Index	14,874.7	0.3	4.5
6 month	IDSWT6M Index	14,873.1	0.3	4.5
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,871.3	0.2	4.5
6 month	IDFWT6M Index	14,965.0	(0.3)	4.3
			(0.0)	

*price as of 6/7/2023

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