

FOR PROFESSIONAL INVESTORS - 09/25/2020

# DAILY REPORT INDONESIA MARKET WRAP

# **EQUITY MARKET**

## **REBOUNDED**

JCI advanced and closed at 4,946 (+103 points or +2.13%) today. Shares across regional markets were mixed as investors weighed the receding prospects of a new American stimulus package against the global uptick in coronavirus cases. Meanwhile, foreign investors continued to record net outflow of IDR 830Bn today and rupiah slightly strengthened to IDR 14,873/USD.

Banking stocks were positive as BBCA (+3.03%), BBRI (+4.29%), BMRI (+5.42%), BBNI (+6.24%), and BDMN (+5.21%) all closed higher. Consumer names were positive as UNVR (+1.6%), HMSP (+2.83%), KAEF (+24.68%), KLBF (+4.29%), and MYOR (+2.11%) all rose. Infra stocks were positive as JSMR (+5.54%), PGAS (+3.65%), TOWR (+1.49%), and TBIG (+1.89%) all in green. Retailer names were positive as ACES (+9.03%), AMRT (+2.27%), MAPI (+3.57%), and RALS (+1.8%) all up. Other movers were MKPI (+8.11%), ASII (+5.65%), PLIN (-6.93%), and TFCO (-6.67%).

Large scale social distancing (PSBB) in Jakarta will be extended until 11th Oct 2020 as decided by Governor of Jakarta, Anies Baswedan. Coordinating Minister Maritime Affairs and Investment, Pak Luhut Panjaitan, approved of this automatic extension.

# **BOND MARKET**

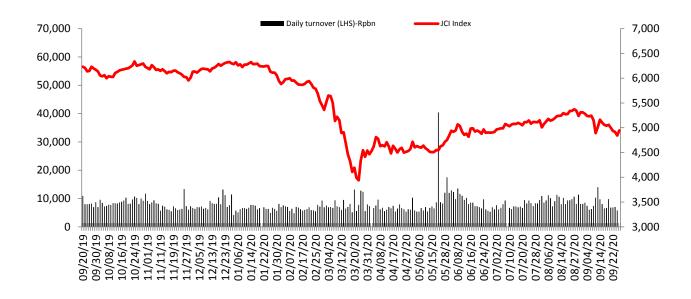
#### **FLATTISH**

The bond market saw no improvement in risk sentiment today although we witnessed two ways trading in the market. Lacking fresh catalyst, bond prices continued to trade range bound and concentrated on 10Y areas. Yield wise, there is no significant movement and yield managed to close the day lower around 1 to 3bps compare to yesterday's closing level. Thin trading volume during the day pushed bidders to be more defensive despite Rupiah weakening against USD throughout the day.

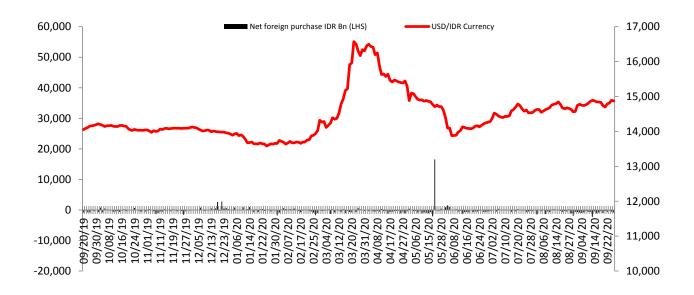


# **GRAPHS & TABLES**

### **JCI & DAILY TURNOVER**



## **IDR & NET FOREIGN PURCHASES**





# **EQUITY, BONDS AND CURRENCY SNAPSHOTS**

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
Bonds					
FR81	FR0081 Govt	103.5	(0.0)	3.0	5Y
FR82	FR0082 Govt	100.8	(0.1)	1.3	10Y
FR80	FR0080 Govt	100.9	0.0	0.5	15Y
FR83	FR0083 Govt	100.7	(0.1)	1.2	20Y
Asia Pacific					
Jakarta Composite	JCI Index	4,945.8	2.1	(21.5)	
Thailand	SET Index	1,244.9	(0.2)	(21.2)	
Korean Stock Exch.	KOSPI Index	2,278.8	0.3	3.7	
Straight Times	FSSTI Index	2,472.3	0.9	(23.3)	
Kuala Lumpur	KLCI Index	1,509.1	0.6	(5.0)	
Philipines	PCOMP Index	5,838.7	(0.1)	(25.3)	
Nikkei	NKY Index	23,204.6	0.5	(1.9)	
Hang Seng	HSI Index	23,235.4	(0.3)	(17.6)	
MSCI-Asia pacific	MXAP Index	167.7	(1.8)	(1.7)	
Global Indices					
Dow Jones	INDU Index	26,815.4	0.2	(6.0)	
S&P 500	SPX Index	3,246.6	0.3	0.5	
Nasdaq	CCMP Index	10,672.3	0.4	18.9	
FTSE 100	UKX Index	5,799.7	(0.4)	(23.1)	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,873.0	0.1	(6.8)
Swap-IDR				
1 month	IDSWT1M Index	14,962.1	0.6	7.0
3 month	IDSWT3M Index	14,994.5	0.9	(8.2)
6 month	IDSWT6M Index	14,939.0	1.6	(7.7)
Forward-IDR				
3 month	IDFWT3M Index	14,978.3	0.8	(7.4)
6 month	IDFWT6M Index	14,985.0	(0.6)	(5.6)
			(0.1)	

\*price as of 9/24/2020



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