

FOR PROFESSIONAL INVESTORS - 07/28/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

FLAT

JCI slightly weakened and closed at 6,089 (-9 points or -0.14%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 330Bn today and rupiah was stabilized at IDR 14,488/USD.

Banking stocks were mostly negative as PNB (-2.6%), BBNI (-1.29%), BBKA (-0.42%), and BBRI (-1.84%) all corrected, except BMRI (+1.29%). Consumer names were mostly negative as GGRM (-1.44%), KLBF (-1.87%), HMSP (-1.36%), and UNVR (-1.11%) all closed lower, except SIDO (+5.88%). Telco stocks were negative as FREN (-1.63%), ISAT (-3.8%), and TLKM (-2.45%) all closed lower. Construction names were negative as ADHI (-4.73%), WKA (-3.05%), PTPP (-5.03%), and WSKT (-6.7%) all corrected. Other movers were SDRA (+25%), MMLP (+16.26%), MAYA (-6.71%), and MASA (-6.62%).

The Ministry of Investment noted that investment realization reached Rp223 tn (+16.2% YoY) in 2Q21. In detail, the realization of domestic investment is Rp106.2 tn. Meanwhile, foreign investment reached Rp116.8 tn.

BOND MARKET

FLATTISH

The bond market saw no improvement in risk sentiment today although we witnessed two ways trading in the market. Bond prices continued to trade range bound and concentrated on 5Y - 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. Offer level in the market for benchmark series of 5Y/10Y/15Y/20Y was at 5.16%/6.28%/6.28%/7.04%.

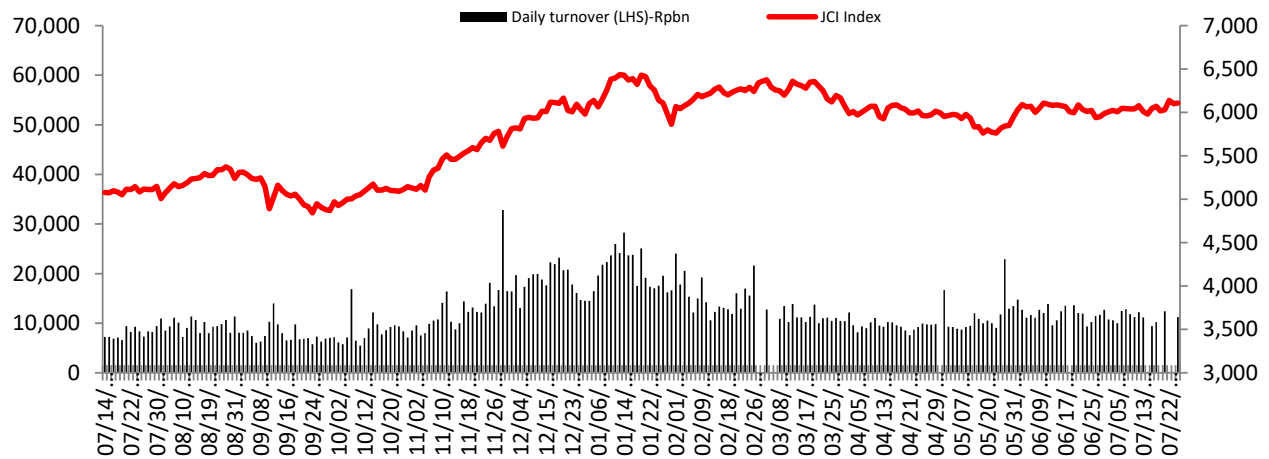


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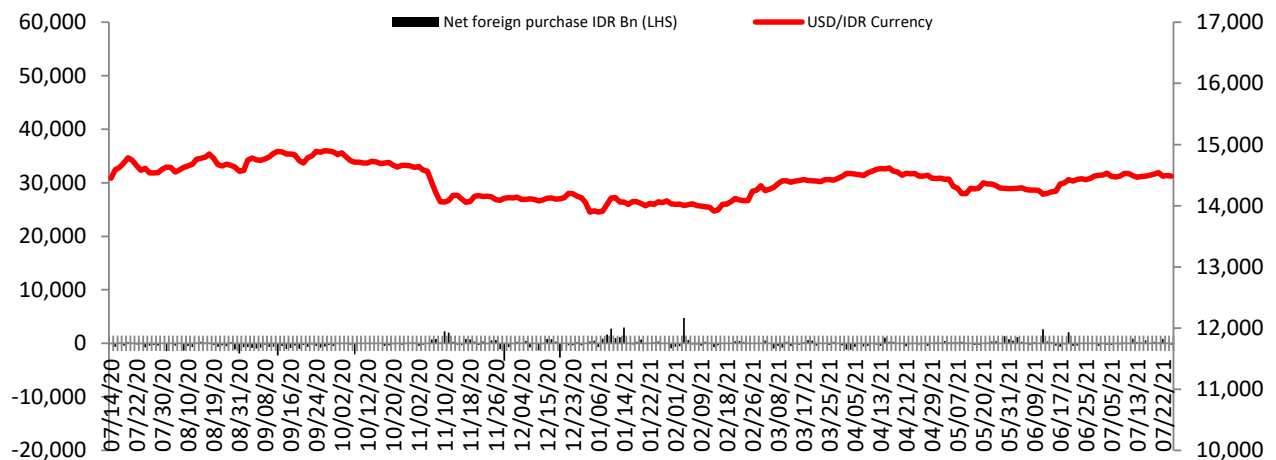
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GRAPHS & TABLES

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	101.3	0.2	(0.4)	5Y
FR82	FR0082 Govt	101.5	(0.0)	(3.1)	10Y
FR80	FR0080 Govt	99.6	0.5		15Y
FR83	FR0083 Govt	104.4	0.1	(5.8)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,088.5	(0.1)	1.8	
Thailand	SET Index	1,537.6	(0.5)	6.1	
Korean Stock Exch.	KOSPI Index	3,236.9	0.1	12.6	
Straight Times	FSSTI Index	3,141.8	0.1	10.5	
Kuala Lumpur	KLCI Index	1,515.4	0.1	(6.9)	
Philippines	PCOMP Index	6,473.0	(0.8)	(9.3)	
Nikkei	NKY Index	27,581.7	(1.4)	0.5	
Hang Seng	HSI Index	25,473.9	1.5	(6.5)	
MSCI-Asia pacific	MXAP Index	196.2	(1.1)	(1.9)	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,058.5	(0.2)	14.5	
S&P 500	SPX Index	4,401.5	(0.5)	17.2	
Nasdaq	CCMP Index	14,660.6	(1.2)	13.8	
FTSE 100	UKX Index	7,005.7	0.1	8.4	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,488.0	0.0	(3.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,490.6	(0.0)	2.8
3 month	IDSWT3M Index	14,493.0	0.0	(2.8)
6 month	IDSWT6M Index	14,493.1	(0.0)	(2.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,538.6	0.1	(2.7)
6 month	IDFWT6M Index	14,593.7	(0.0)	(1.2)

*price as of 7/27/2021


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