

FOR PROFESSIONAL INVESTORS - 12/20/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

WEAKENED

JCI weakened and closed at 6,547 (-55 points or -0.83%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net inflow of IDR 544Bn today and rupiah was stabilized at IDR 14,378/USD.

Banking stocks were mostly negative as BDMN (-1.65%), BBNI (-0.37%), BMRI (-1.05%), and BBKA (-1.67%) all weakened, except BBRI (+0.24%). Consumer names were negative as SIDO (-1.14%), UNVR (-0.24%), MYOR (-0.99%), INDF (-1.54%), and HMSP (-1.02%) all weakened. Mining stocks were negative as INCO (-0.86%), INDY (-6.02%), ITMG (-3.14%), ANTM (-1.33%), and PTBA (-2.93%) all corrected. Material names were negative as BRPT (-1.12%) and TPIA (-3.38%) all down. Other movers were APEX (+24.62%), MPRO (+9.58%), MASA (-6.87%), and BBHI (-5.19%).

The DKI Jakarta Provincial Government has decided to increase the 2022 Provincial Minimum Wage by IDR 225,667 or 5.1% from the 2021 UMP to IDR 4,641,854.

BOND MARKET

WITHIN RANGE

The mixed sentiment continued to be seen in the bond market today with the bond price opened around the same level as last Friday's closing. We witnessed several sporadic activity although the volume was very limited. Overall, yield somewhere 1-3bps tighter across tenors, but IDR bonds still traded within range. Investors closely watching UST movement amid rising omicron concerns. The benchmark of 5Y, 10Y, 15Y and 20Y closed at mid yields of 5.16%, 6.39%, 6.26% and 7.05% respectively. Spot closed at 14,402.

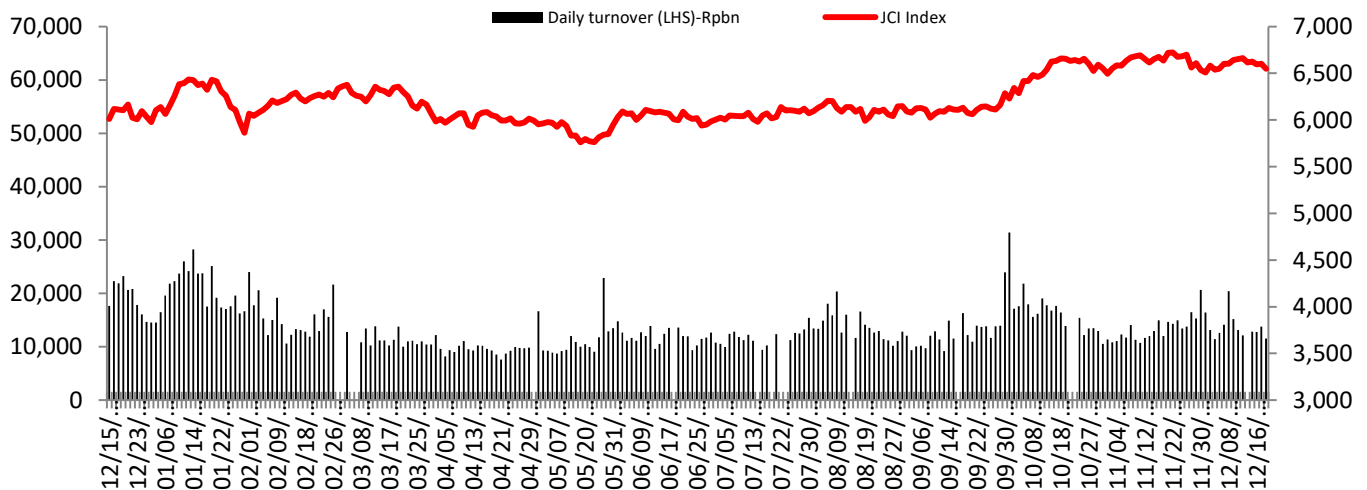


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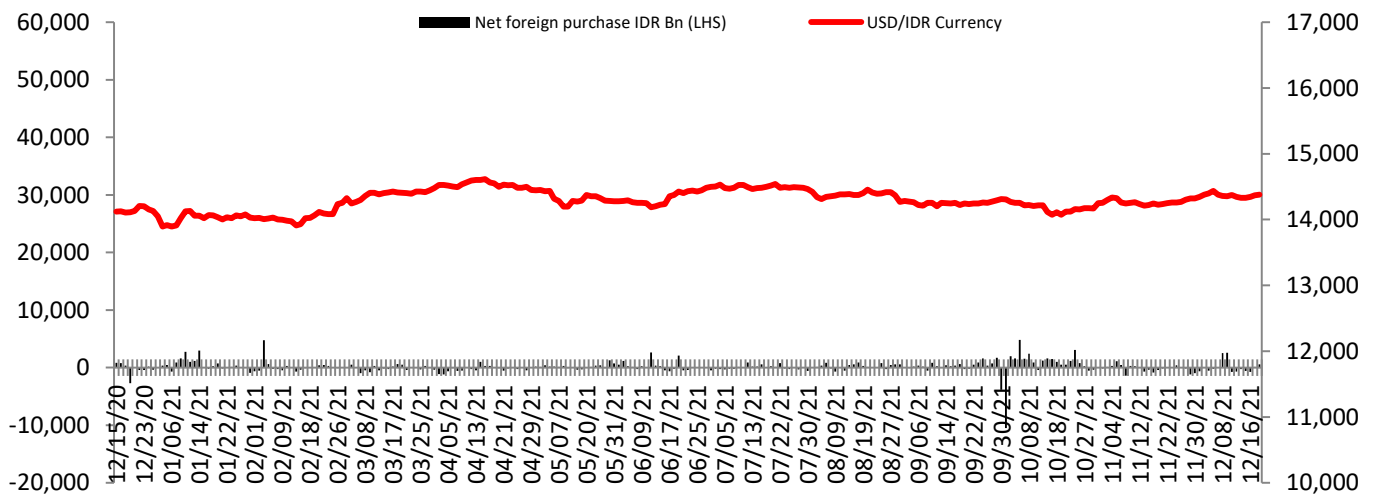
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GRAPHS & TABLES

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	0.1	(0.4)	5Y
FR82	FR0082 Govt	100.7	0.2	(3.9)	10Y
FR80	FR0080 Govt	99.8	0.0		15Y
FR83	FR0083 Govt	104.5	0.2	(5.7)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,547.1	(0.8)	9.5	
Thailand	SET Index	1,615.8	(1.6)	11.5	
Korean Stock Exch.	KOSPI Index	2,963.0	(1.8)	3.1	
Straight Times	FSSTI Index	3,073.0	(1.2)	8.1	
Kuala Lumpur	KLCI Index	1,493.9	(0.5)	(8.2)	
Philippines	PCOMP Index	7,237.6	(0.8)	1.4	
Nikkei	NKY Index	27,937.8	(2.1)	1.8	
Hang Seng	HSI Index	22,744.9	(1.9)	(16.5)	
MSCI-Asia pacific	MXAP Index	191.5	(0.9)	(4.2)	
<u>Global Indices</u>					
Dow Jones	INDU Index	35,365.4	(1.5)	15.5	
S&P 500	SPX Index	4,620.6	(1.0)	23.0	
Nasdaq	CCMP Index	15,169.7	(0.1)	17.7	
FTSE 100	UKX Index	7,141.3	(1.8)	10.5	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,378.0	(0.1)	(2.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,335.0	(0.3)	1.7
3 month	IDSWT3M Index	14,379.5	0.2	(2.0)
6 month	IDSWT6M Index	14,360.0	(0.1)	(1.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,395.2	0.0	(1.7)
6 month	IDFWT6M Index	14,492.2	0.2	(0.5)

*price as of 12/17/2021


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* PT BNP Asset Management (address: Sequis Tower, 29th Floor, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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