

FOR PROFESSIONAL INVESTORS - 08/25/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### SLIDE DOWN

JCI slightly weakened and closed at 7,174 (-20 points or -0.28%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net outflow of IDR 656Bn today and rupiah slightly strengthened to IDR 14,823/USD.

Banking stocks were mixed as BBKA (+1.57%) and PNBK (+4.65%) up, while BBNI (-0.3%), BMRI (-0.58%), and BBRI (-0.47%) closed lower. Consumer names were negative as UNVR (-0.21%), MYOR (-1.06%), KLBF (-0.31%), SDO (-2%), and INDF (-1.13%) all weakened. Retailer stocks were negative as ACES (-2.61%), AMRT (-0.5%), MAPI (-2.46%), and LPPF (-6.72%) all retreated. Material names were negative as BRPT (-1.73%) and TPIA (-2.1%) all down. Other movers were BUMI (+16.78%), BRMS (+10.34%), BFIN (-4.03%), and TLKM (-3.79%).

Government to decrease the airline ticket price through doubling Garuda Indonesia (GIAA) and Citilink's number of airplanes from 61 to 120 airplanes.

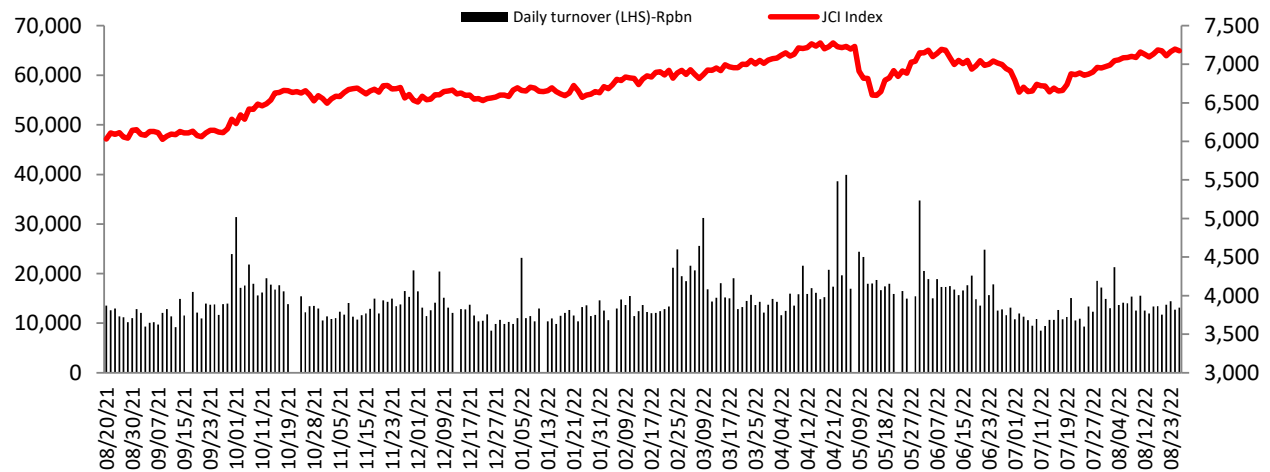
### BOND MARKET

#### FLATTISH

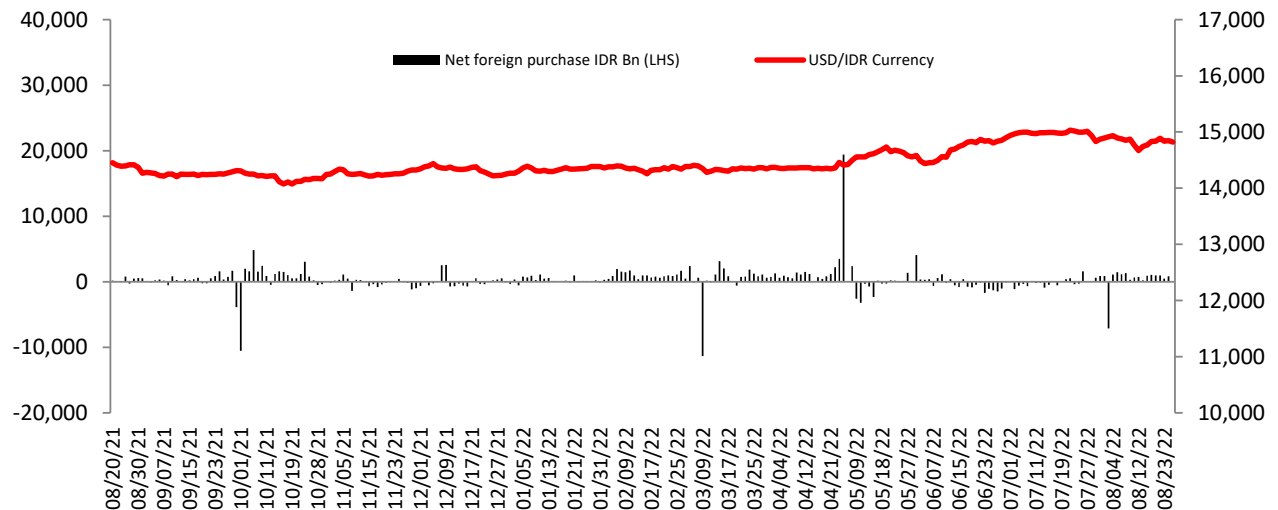
The bond market saw no improvement in risk sentiment today although we witnessed two ways trading in the market. Morning session saw buying interest started by foreign players. While on the afternoon session as we witnessed several names showed their selling interest particularly after London opened although trading volume remained thin. Thin trading volume during the day pushed bidders to be more defensive. Price movement went back to range bound

## 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    | 94.3     | 0.1        | (6.5)      | 5Y    |
| FR82                  | FR0082 Govt    | 95.4     | (0.1)      | (5.3)      | 10Y   |
| FR80                  | FR0080 Govt    | 94.0     | 0.0        |            | 15Y   |
| FR83                  | FR0083 Govt    | 100.0    | 0.0        | (2.6)      | 20Y   |
| <u>Asia Pacific</u>   |                |          |            |            |       |
| Jakarta Composite     | JCI Index      | 7,174.2  | (0.3)      | 9.0        |       |
| Thailand              | SET Index      | 1,643.3  | 0.7        | (0.9)      |       |
| Korean Stock Exch.    | KOSPI Index    | 2,477.3  | 1.2        | (16.8)     |       |
| Straight Times        | FSSTI Index    | 3,249.8  | 0.5        | 4.0        |       |
| Kuala Lumpur          | KLCI Index     | 1,493.7  | 1.8        | (4.7)      |       |
| Philippines           | PCOMP Index    | 6,706.4  | 0.9        | (5.8)      |       |
| Nikkei                | NKY Index      | 28,479.0 | 0.6        | (1.1)      |       |
| Hang Seng             | HSI Index      | 19,968.4 | 3.6        | (14.7)     |       |
| MSCI-Asia pacific     | MXAP Index     | 157.9    | (0.5)      | (18.3)     |       |
| <u>Global Indices</u> |                |          |            |            |       |
| Dow Jones             | INDU Index     | 32,969.2 | 0.2        | (9.3)      |       |
| S&P 500               | SPX Index      | 4,140.8  | 0.3        | (13.1)     |       |
| Nasdaq                | CCMP Index     | 12,431.5 | 0.4        | (20.5)     |       |
| FTSE 100              | UKX Index      | 7,514.4  | 0.6        | 1.8        |       |

|                    | Bloomberg Code | IDR      | % Chg. D-D | % Chg. YTD |
|--------------------|----------------|----------|------------|------------|
| Spot IDR           | IDR Curncy     | 14,823.0 | 0.2        | (3.8)      |
| <u>Swap-IDR</u>    |                |          |            |            |
| 1 month            | IDSWT1M Index  | 14,821.3 | 0.5        | 3.9        |
| 3 month            | IDSWT3M Index  | 14,884.9 | (0.0)      | (4.3)      |
| 6 month            | IDSWT6M Index  | 14,898.7 | 0.1        | (4.4)      |
| <u>Forward-IDR</u> |                |          |            |            |
| 3 month            | IDFWT3M Index  | 14,923.0 | 0.1        | (4.3)      |
| 6 month            | IDFWT6M Index  | 14,938.1 | 0.2        | (3.8)      |
|                    |                |          |            | (3.4)      |

\*price as of 8/25/2022


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