

FOR PROFESSIONAL INVESTORS - 04/01/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

HOLDING UP

JCI slightly strengthened and closed at 7,079 (+7 points or +0.1%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 1.28Tn today and rupiah was stabilized at IDR 14,368/USD.

Banking stocks were mostly negative as MEGA (-0.39%), BBNI (-0.61%), BMRI (-0.32%), and BBKA (-0.63%) all down, except BBRI (+1.5%). Consumer names were mixed as ICBP (+2.38%), INDF (+1.68%), and GGRM (+0.95%) inched higher, while UNVR (-1.09%) and SIDO (-6.37%) declined. Mining stocks were positive as ADRO (+4.46%), INCO (+2.99%), ANTM (+2.87%), TINS (+3.3%), and PTBA (+1.22%) all up. Hospital names were positive as MIKA (+3.23%), HEAL (+3.4%), and SILO (+1.25%) all up. Other movers were DUTI (+18.83%), ESSA (+8.64%), FASW (-6.69%), and FREN (-5.19%).

Gov't finally raised Pertamina (Ron 92) retail fuel price in 16 provinces effective 1Apr2022 to Rp12,500/litre from Rp9,000 (Note: Java-Bali price). Gov't has previously mentioned that economical price should be Rp16k. Peralite remains subsidized as per planned.

BOND MARKET

TWO WAY INTEREST

The mixed sentiment continued to be seen in the bond market today with the bond price opened around the same level as yesterday's closing. Bond price movement was within range as the market showed two way interests throughout the day. However, in general the bond market moved lower with local currency slightly weakened against USD. In the middle of the day, Government announced CPI December recorded at 2.64% YoY/0.66% MoM higher against consensus (+2.55% YoY/ +0.60% MoM). The 5Y/10Y/15Y/20Y benchmark closed the week at mid-yield of 5.61%/6.74%/6.66%/7.21%.

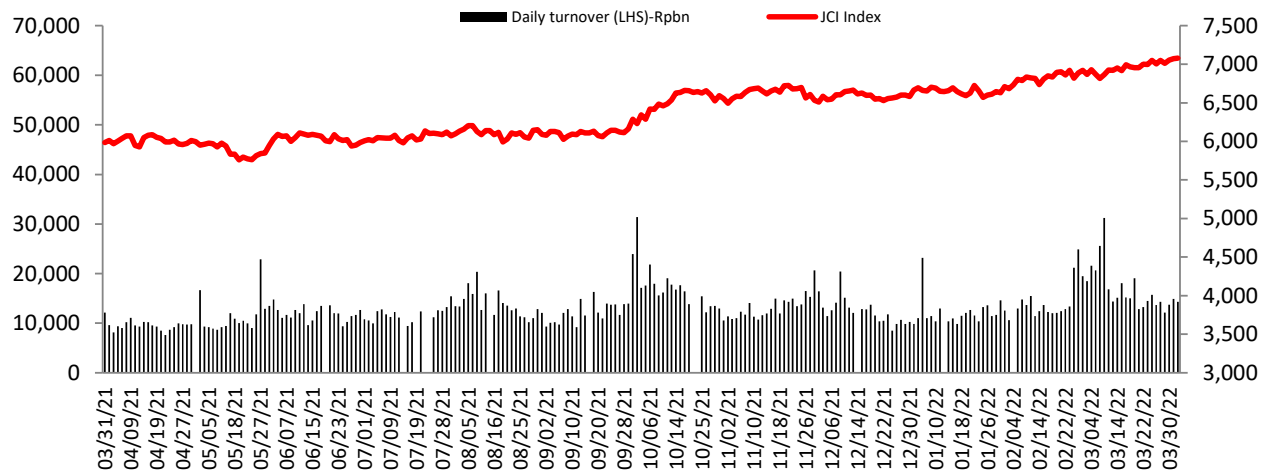


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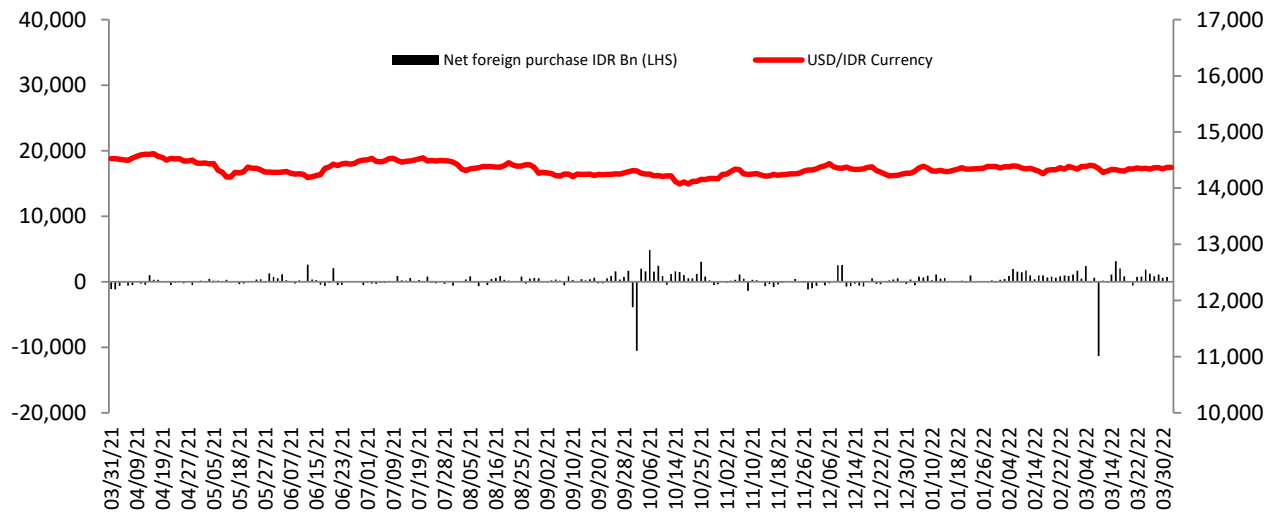
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GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



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EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR81	FR0081 Govt	97.9	(0.0)	(2.9)	5Y
FR82	FR0082 Govt	97.5	(0.0)	(3.3)	10Y
FR80	FR0080 Govt	97.3	(0.0)		15Y
FR83	FR0083 Govt	99.1	0.0	(3.4)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,078.8	0.1	7.6	
Thailand	SET Index	1,700.7	0.3	2.6	
Korean Stock Exch.	KOSPI Index	2,739.9	(0.6)	(8.0)	
Straight Times	FSSTI Index	3,422.7	0.4	9.6	
Kuala Lumpur	KLCI Index	1,602.4	0.9	2.2	
Philippines	PCOMP Index	7,152.9	(0.7)	0.4	
Nikkei	NKY Index	27,666.0	(0.6)	(3.9)	
Hang Seng	HSI Index	22,039.6	0.2	(5.8)	
MSCI-Asia pacific	MXAP Index	180.5	(0.7)	(6.6)	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,678.4	(1.6)	(4.6)	
S&P 500	SPX Index	4,530.4	(1.6)	(4.9)	
Nasdaq	CCMP Index	14,220.5	(1.5)	(9.1)	
FTSE 100	UKX Index	7,542.6	0.4	2.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,368.0	0.0	(0.8)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,357.9	0.1	0.7
3 month	IDSWT3M Index	14,358.3	0.1	(0.6)
6 month	IDSWT6M Index	14,354.7	(0.0)	(0.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,370.3	0.1	(0.5)
6 month	IDFWT6M Index	14,415.0	0.2	(0.2)
			(0.1)	(0.9)

*price as of 4/1/2022


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