



FOR PROFESSIONAL INVESTORS - 05/06/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

FLAT

JCI was flat and closed at 5,970 (-6 points or -0.09%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 182Bn today and rupiah advanced to IDR 14,319/USD.

Banking stocks were mostly positive as BBRI (+0.49%), BMRI (+0.41%), MEGA (+1.5%), and BBNI (+0.44%) all in green, except BDMN (-1.54%). Consumer names were mixed as KLBF (+1.04%) and INDF (+0.77%) rose, while GGRM (-0.64%), MYOR (-1.12%), and UNVR (-3.9%) declined. Material stocks were negative as BRPT (-3.08%) and TPIA (-1.81%) all corrected. Properties names were negative as CTRA (-0.88%), SMRA (-1.59%), LPKR (-2.75%), and PWON (-2.88%) all declined. Other movers were POLI (+23.89%), SUPR (+7.14%), BMAS (-6.98%), and MEDC (-3.6%).

Indo Q1 GDP growth -0.74% YoY vs est -0.65% YoY. GDP fell -0.96% QoQ vs est -0.85% QoQ. GDP growth YoY by expenditure: private consumption: -2.23%, govt spending +2.96%, gross fixed capital formation -0.235 and exports +6.74%.

BOND MARKET

FLOW DRIVEN

Indonesia bond market closed the day with better sentiment. Rupiah strengthened to 14,300 levels and UST touched 1.57%, triggered bullish tone in the bond market. Flow was mainly heard from foreign banks collecting non benchmark and benchmark series throughout the day, while local names seen on both sides. Market trading was particularly active on 10Y – 20Y areas which remained as the most actively traded bonds for the day. Market closed with yields lower by 3 – 5 bps compared to yesterday closing level.

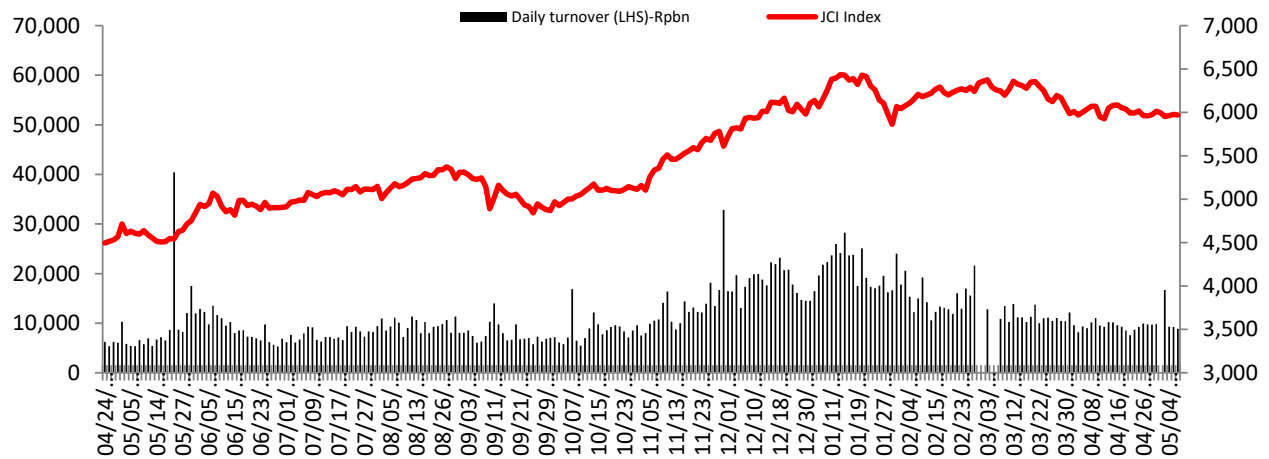


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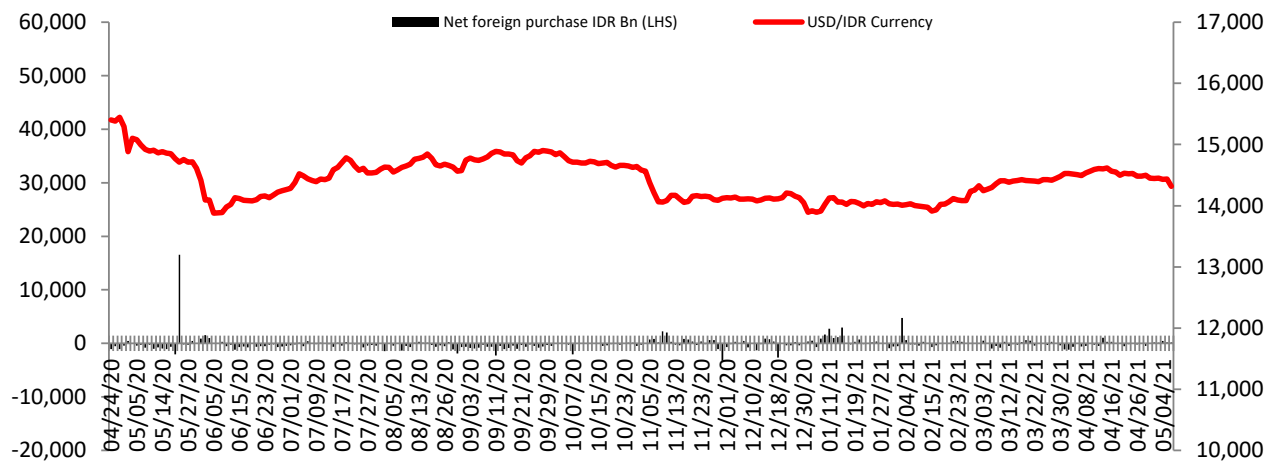
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GRAPHS & TABLES

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	99.6	0.1	(2.0)	5Y
FR82	FR0082 Govt	100.7	0.2	(3.9)	10Y
FR80	FR0080 Govt	99.0	0.4		15Y
FR83	FR0083 Govt	103.9	0.4	(6.2)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	5,970.2	(0.1)	(0.1)	
Thailand	SET Index	1,571.9	1.5	8.5	
Korean Stock Exch.	KOSPI Index	3,178.7	1.0	10.6	
Straight Times	FSSTI Index	3,173.0	0.6	11.6	
Kuala Lumpur	KLCI Index	1,578.3	0.2	(3.0)	
Philippines	PCOMP Index	6,282.8	(0.3)	(12.0)	
Nikkei	NKY Index	29,331.4	1.8	6.9	
Hang Seng	HSI Index	28,637.5	0.8	5.2	
MSCI-Asia pacific	MXAP Index	204.9	(0.2)	2.5	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,230.3	0.3	11.8	
S&P 500	SPX Index	4,167.6	0.1	11.0	
Nasdaq	CCMP Index	13,582.4	(0.4)	5.4	
FTSE 100	UKX Index	7,048.8	0.1	9.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,319.0	0.8	(1.9)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,423.2	(0.2)	2.4
3 month	IDSWT3M Index	14,433.2	0.1	(2.4)
6 month	IDSWT6M Index	14,430.0	(0.0)	(2.3)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,481.6	0.1	(2.3)
6 month	IDFWT6M Index	14,654.2	0.8	(1.7)
				(0.4)

*price as of 5/5/2021


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