

FOR PROFESSIONAL INVESTORS - 08/18/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Stronger

JCI advanced and closed at 7,187 (+53 points or +0.74%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 1080Bn today and rupiah slightly weakened to IDR 14,833/USD.

Banking stocks were positive as BBRI (+1.17%), BMRI (+0.88%), BBKA (+0.31%), BBNI (+0.87%), and MEGA (+0.49%) all advanced. Consumer names were positive as HMSP (+1.65%), UNVR (+0.42%), INDF (+0.38%), ICBP (+0.29%), and SIDO (+0.65%) all closed higher. Poultry stocks were positive as CPIN (+3.95%), JPFA (+7.31%), and MAIN (+3.2%) all inched higher. Telco names were mixed as TLKM (+3.17%) closed higher, while EXCL (-1.52%) and FREN (-3.64%) closed lower. Other movers were BMTR (+7.69%), BHIT (+6.06%), PANI (-7%), and LPPF (-3.85%).

The government will increase public housing subsidies to Rp34.2tr in 2023 (+17.5% yoy). In addition, the infrastructure budget allocation in the state budget is Rp392tr (7.8% yoy).

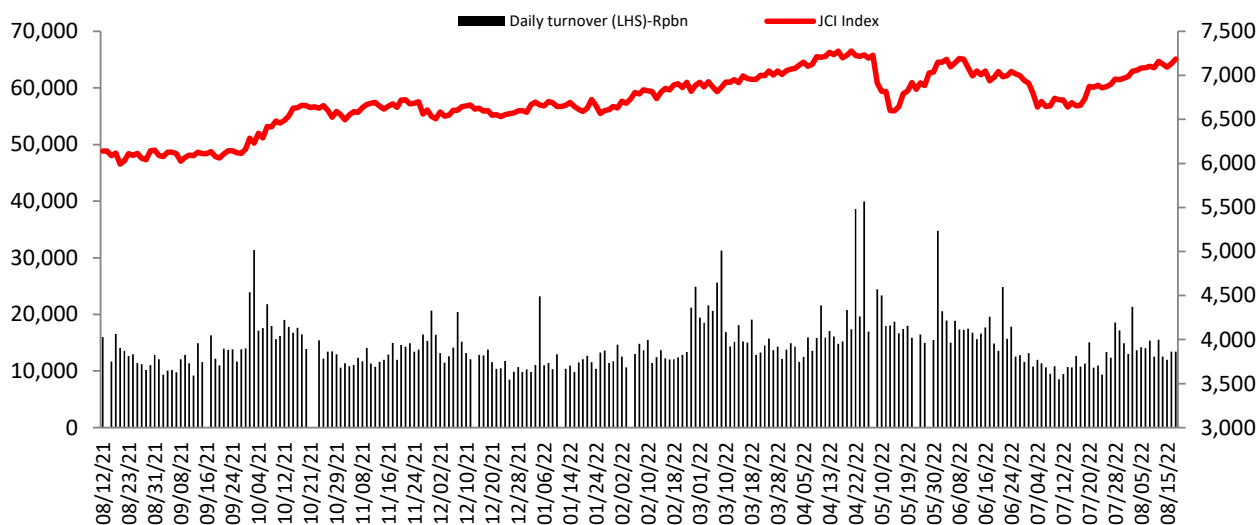
BOND MARKET

TWO WAY INTEREST

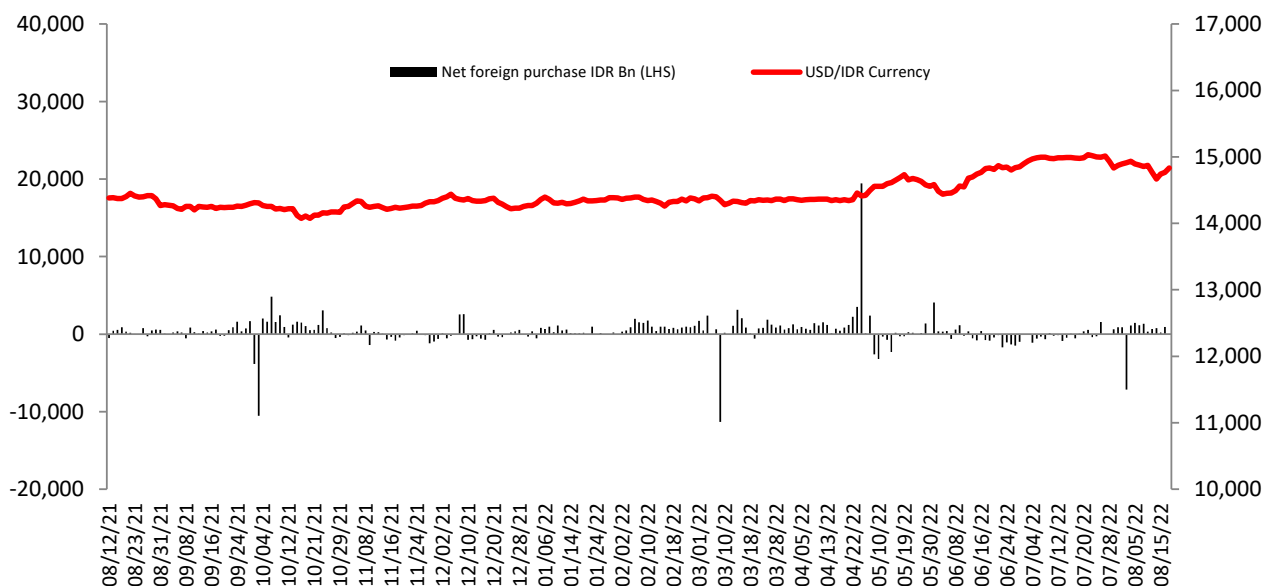
Indonesia bond market traded softer today with higher yield around 3 – 6 bps. Selling activities for benchmark series were driven by foreign names while local names were on the buy side. The auction winners were also seen still trying to do some profit taking. On the other hand, while we seen offerish tone on the other series, the new series 5Y FR95 and 10Y FR96 were still on high demand. The 5Y FR95 and 10Y FR96 seen last traded at 100.25 (6.32%) and 100.3 (6.95%).

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 | 95.1 | 0.1 | (5.8) | 5Y |
| FR82 | FR0082 Govt | 95.5 | (0.2) | (5.3) | 10Y |
| FR80 | FR0080 Govt | 94.2 | (0.2) | | 15Y |
| FR83 | FR0083 Govt | 100.2 | 0.1 | (2.3) | 20Y |
| <u>Asia Pacific</u> | | | | | |
| Jakarta Composite | JCI Index | 7,186.6 | 0.7 | 9.2 | |
| Thailand | SET Index | 1,634.8 | (0.3) | (1.4) | |
| Korean Stock Exch. | KOSPI Index | 2,508.1 | (0.3) | (15.8) | |
| Straight Times | FSSTI Index | 3,272.3 | 0.3 | 4.8 | |
| Kuala Lumpur | KLCI Index | 1,516.6 | (0.1) | (3.2) | |
| Philippines | PCOMP Index | 6,824.6 | 0.1 | (4.2) | |
| Nikkei | NKY Index | 28,942.1 | (1.0) | 0.5 | |
| Hang Seng | HSI Index | 19,763.9 | (0.8) | (15.5) | |
| MSCI-Asia pacific | MXAP Index | 163.0 | 0.1 | (15.6) | |
| <u>Global Indices</u> | | | | | |
| Dow Jones | INDU Index | 33,980.3 | (0.5) | (6.5) | |
| S&P 500 | SPX Index | 4,274.0 | (0.7) | (10.3) | |
| Nasdaq | CCMP Index | 12,938.1 | (1.3) | (17.3) | |
| FTSE 100 | UKX Index | 7,505.5 | (0.1) | 1.6 | |

| | Bloomberg Code | IDR | % Chg. D-D | % Chg. YTD |
|--------------------|----------------|----------|------------|------------|
| Spot IDR | IDR Curncy | 14,833.0 | (0.4) | (3.9) |
| <u>Swap-IDR</u> | | | | |
| 1 month | IDSWT1M Index | 14,750.0 | (0.4) | 3.4 |
| 3 month | IDSWT3M Index | 14,765.2 | 0.2 | (3.4) |
| 6 month | IDSWT6M Index | 14,755.9 | 0.2 | (3.4) |
| <u>Forward-IDR</u> | | | | |
| 3 month | IDFWT3M Index | 14,792.0 | 0.3 | (3.4) |
| 6 month | IDFWT6M Index | 14,788.0 | 0.3 | (2.8) |
| | | | | (2.9) |

*price as of 8/18/2022



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