

FOR PROFESSIONAL INVESTORS - 08/04/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Whipsaw

JCI slightly strengthened and closed at 7,057 (+11 points or +0.15%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 1.12Tn today and rupiah slightly weakened to IDR 14,933/USD.

Banking stocks were mixed as BBCA (+2.3%) and MEGA (+0.5%) inched higher, while PNB (-3.55%), BBNI (-1.54%), and BBRI (-0.46%) corrected. Consumer names were positive as INDF (+1.14%), ICBP (+1.42%), GGRM (+2.29%), KLBF (+0.31%), and HMSM (+1.1%) all in green. Mining stocks were negative as TINS (-0.68%), INDY (-1.5%), ITMG (-2.11%), PTBA (-2.84%), and ADRO (-3.63%) all down. Cement names were mixed as SMGR (+4.25%), INTP (+5.77%), and SMBR (+2.98%) up, while SMCB unchanged. Other movers were EMTK (+8.05%), SCMA (+5.88%), PNLF (-6.45%), and BIPI (-6.12%).

Banggar DPR predicts that Indonesia's inflation can reach 6-6.5%, compared to 2021 levels at 1.87% in 2021.

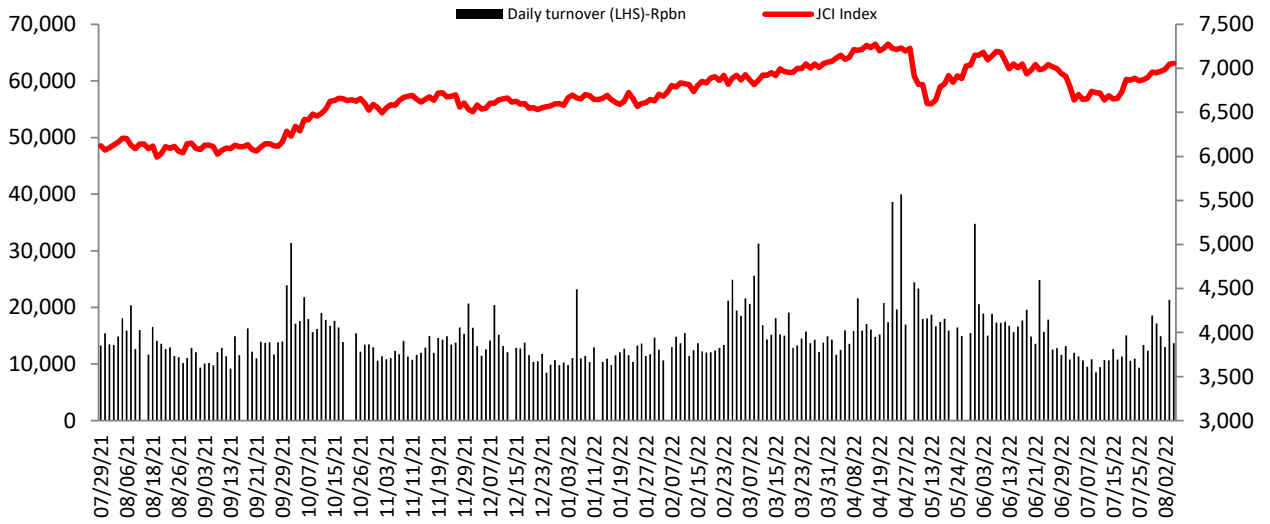
BOND MARKET

UNEVENTFUL

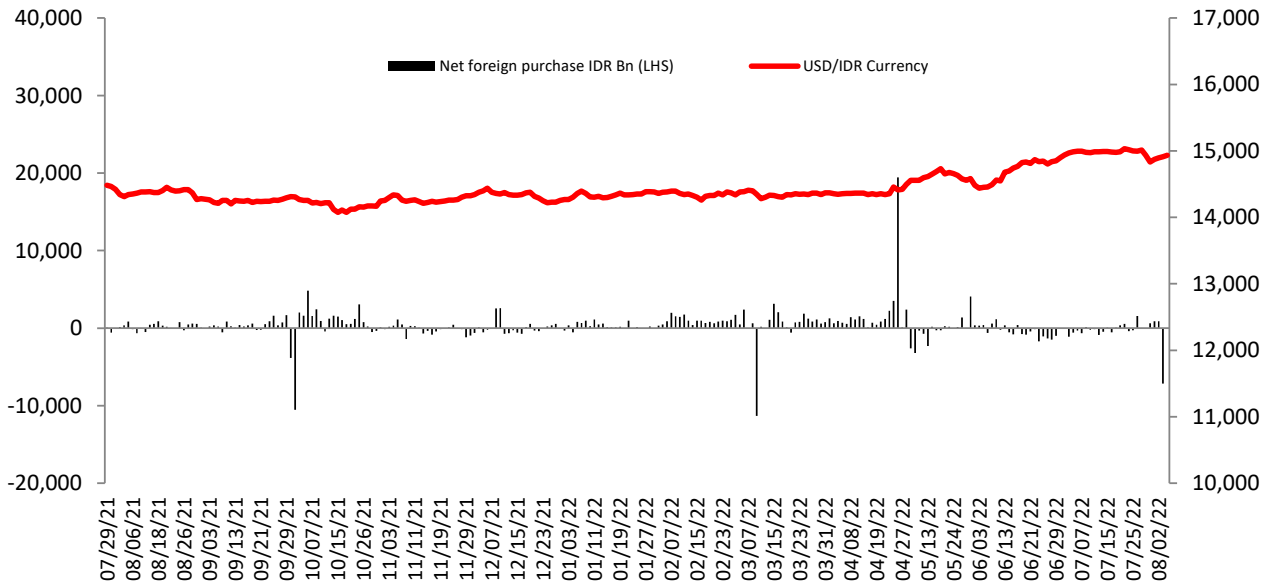
IDR bond market opened the day unchanged despite swing movement in UST overnight. Nothing much happened in the bond market today. Limited activities were seen on 10Y area while the rest of the curve saw limited activity throughout the day. From our side we only heard trade done in 10Y FR91 which was repeatedly traded at 94.5 (7.17%).

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	94.7	0.1	(6.2)	5Y
FR82	FR0082 Govt	94.3	0.1	(6.4)	10Y
FR80	FR0080 Govt	94.4	0.1		15Y
FR83	FR0083 Govt	98.9	(0.0)	(3.6)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,057.3	0.2	7.2	
Thailand	SET Index	1,594.8	0.0	(3.8)	
Korean Stock Exch.	KOSPI Index	2,473.1	0.5	(16.9)	
Straight Times	FSSTI Index	3,268.9	0.5	4.6	
Kuala Lumpur	KLCI Index	1,501.0	0.7	(4.2)	
Philippines	PCOMP Index	6,483.1	0.8	(9.0)	
Nikkei	NKY Index	27,932.2	0.7	(3.0)	
Hang Seng	HSI Index	20,174.0	2.1	(13.8)	
MSCI-Asia pacific	MXAP Index	159.0	(0.4)	(17.7)	
<u>Global Indices</u>					
Dow Jones	INDU Index	32,812.5	1.3	(9.7)	
S&P 500	SPX Index	4,155.2	1.6	(12.8)	
Nasdaq	CCMP Index	12,668.2	2.6	(19.0)	
FTSE 100	UKX Index	7,427.2	(0.2)	0.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,933.0	(0.1)	(4.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,873.4	(1.0)	4.3
3 month	IDSWT3M Index	14,918.0	0.2	(4.5)
6 month	IDSWT6M Index	14,920.0	0.2	(4.6)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,888.9	0.1	(4.1)
6 month	IDFWT6M Index	14,961.9	0.2	(4.0)
			(0.2)	(4.9)

*price as of 8/4/2022

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