



FOR PROFESSIONAL INVESTORS - 04/16/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### HOLDING UP

JCI slightly strengthened and closed at 6,086 (+7 points or +0.11%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net inflow of IDR 297Bn today and rupiah slightly strengthened to IDR 14,565/USD.

Banking stocks were negative as BBTN (-2.77%), BBNI (-0.42%), BBKA (-0.08%), BDMN (-2.96%), and BBRI (-1.59%) all down. Consumer names were mixed as ICBP (+2.29%) and INDF (+0.75%) in green, while HMSP (-0.37%), KLBK (-1.32%), and UNVR (-1.17%) closed lower. Retailer stocks were positive as ERAA (+9.4%), ACES (+3.41%), RALS (+9.87%), and MAPA (+7.8%) all advanced. Material names were negative as BRPT (-1.02%) and TPIA (-0.93%) all down. Other movers were CENT (+15.97%), MDKA (+10.96%), POLL (-6.78%), and TBIG (-3.85%).

E-commerce transaction progress continue its fast growth. In Feb 2021, e-commerce transaction nominal reach Rp27.2tn, +45.28% YoY. There are also 174.6mn transaction volume in Feb, +107.1% YoY.

### BOND MARKET

#### FIRMER

Indonesia bond market opened the day firmer on the back of 10Y UST yield touched 1.53% overnight. As soon as market opened, bond market received a bullish tone. Buying started in 10Y FR87 that got taken up to 100.3 (6.45%) which quickly followed by shorter series 5Y FR86 traded up to 99.35 (5.65%). In second session, we did see some profit takers came in to the market. Overall sentiment was bullish until closing time and at the end of the day, bonds yield closed 6 – 8 bps lower across the board. Next week, Indonesia Debt Management Office (“DMO”) will hold its regular bond auction with IDR 15tn target of issuance comprising of 6M SPNS, 2Y PBS-027, 4Y PBS-017, 13Y PBS-029, 16Y PBS-004 and 25Y PBS-028 with indicative target of IDR 10Tn.

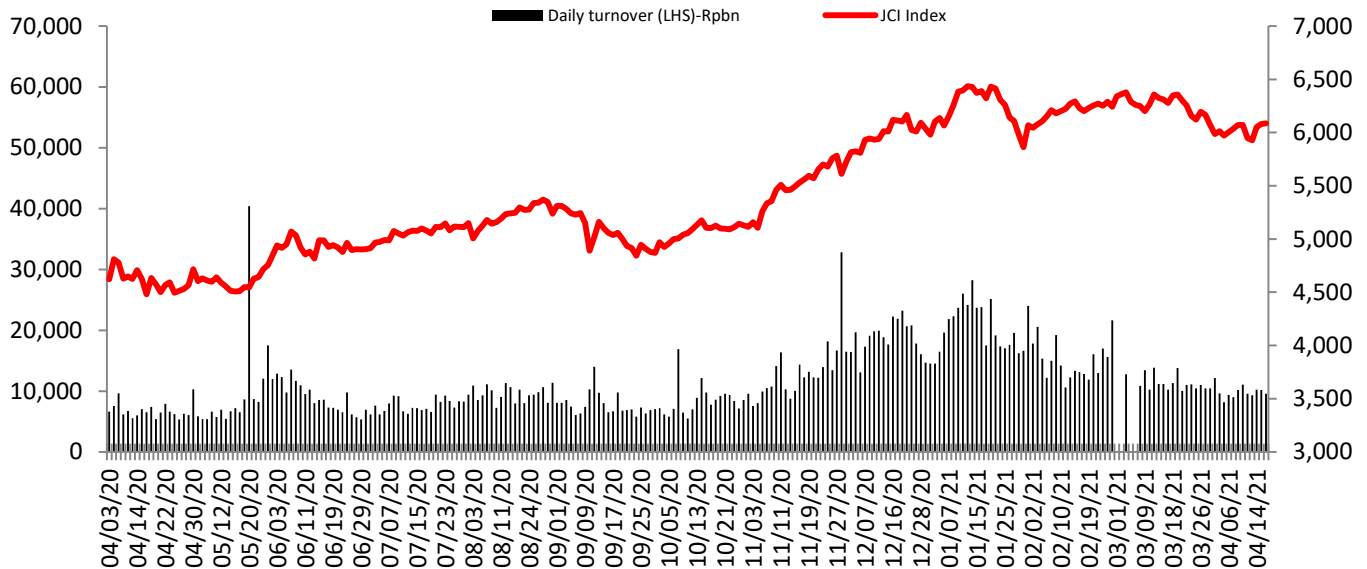


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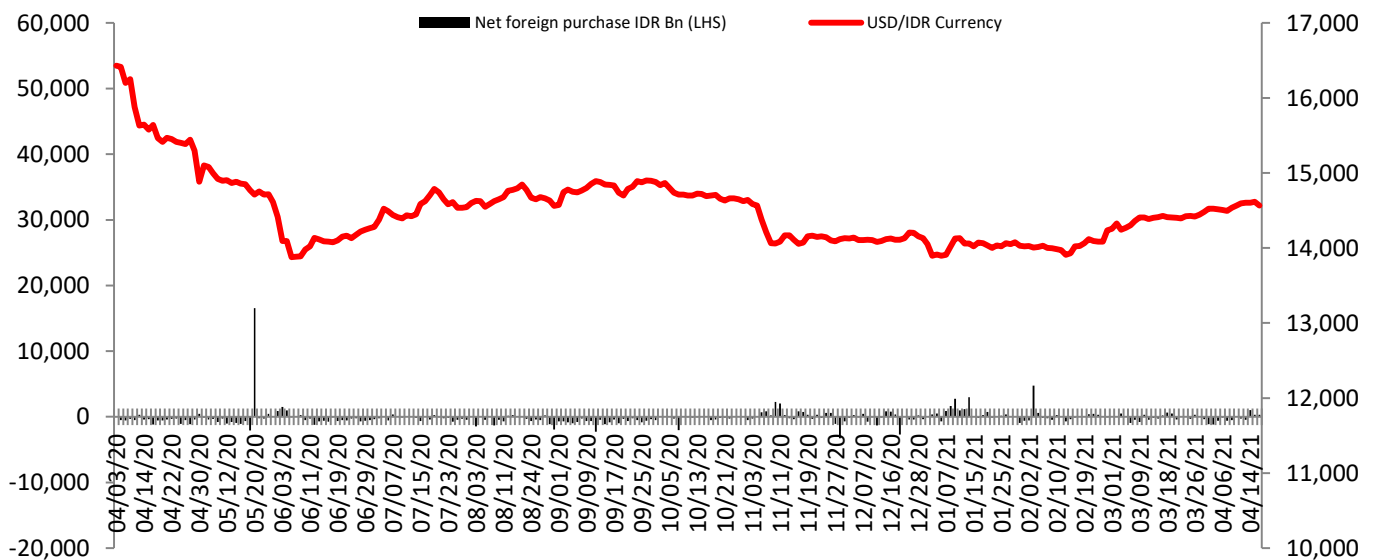
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## GRAPHS & TABLES

### 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	99.3	0.4	(2.3)	5Y
FR82	FR0082 Govt	100.2	0.5	(4.4)	10Y
FR80	FR0080 Govt	97.7	0.5		15Y
FR83	FR0083 Govt	102.5	0.5	(7.5)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,086.3	0.1	1.8	
Thailand	SET Index	1,549.0	0.5	6.9	
Korean Stock Exch.	KOSPI Index	3,198.6	0.1	11.3	
Straight Times	FSSTI Index	3,201.8	0.5	12.6	
Kuala Lumpur	KLCI Index	1,608.4	0.0	(1.2)	
Philippines	PCOMP Index	6,494.8	(0.7)	(9.0)	
Nikkei	NKY Index	29,683.4	0.1	8.2	
Hang Seng	HSI Index	28,969.7	0.6	6.4	
MSCI-Asia pacific	MXAP Index	208.0	0.4	4.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,036.0	0.9	11.2	
S&P 500	SPX Index	4,170.4	1.1	11.0	
Nasdaq	CCMP Index	14,038.8	1.3	8.9	
FTSE 100	UKX Index	7,018.7	0.5	8.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,565.0	0.3	(3.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,648.4	0.2	4.0
3 month	IDSWT3M Index	14,650.0	0.1	(3.9)
6 month	IDSWT6M Index	14,639.4	0.1	(3.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,692.1	(0.1)	(3.8)
6 month	IDFWT6M Index	14,782.3	0.2	(2.6)
				(1.6)

\*price as of 4/15/2021



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