



FOR PROFESSIONAL INVESTORS - 04/21/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### RETREATED

JCI weakened and closed at 5,993 (-45 points or -0.75%) today. Shares across regional markets were negative. Meanwhile, foreign investors recorded net outflow of IDR 512Bn today and rupiah slightly weakened to IDR 14,530/USD.

Banking stocks were negative as BDMN (-0.76%), BBNI (-2.53%), BMRI (-1.21%), BBKA (-1.12%), and BBRI (-1.86%) all retreated. Consumer names were negative as GGRM (-0.41%), MYOR (-1.57%), ICBP (-1.12%), HMSP (-1.49%), and UNVR (-2.01%) all down. Material stocks were negative as TPIA (-0.97%) and BRPT (-2.59%) all corrected. Poultry names were negative as MAIN (-2.16%), JPFA (-0.9%), and CPIN (-1.31%) all retreated. Other movers were BRAM (+18.75%), SIMP (+10%), TBIG (-3.73%), and EMTK (-2.05%).

The Minister of Cooperation and SME reported that there were 4mn MSMEs that have connected to the digital ecosystem in 2020, raising the total number of SMSEs connected to digital platform to 12mn (equivalent to 19% of the total population of SMSEs). This year, the Minister is targeting the number to reach 30 mn.

### BOND MARKET

#### FLATTISH

Indonesia bond market opened wider following stronger 10Y UST yield 1.56% overnight. In the morning session, we heard several selling activities which dragged down market bid prices lower 10-25bps. However, afternoon session saw some support in the sentiment and bond prices went back to opening level.

In the meantime, MoF held Green Shoe Option today after yesterday's sukuk auction and received the incoming bids of IDR 3.412Tn. MoF managed to absorb only IDR 2.635Tn and making the issuance to a total of IDR 10Tn. The winners get the benchmark series at the weighted average yields of the original auction yesterday.

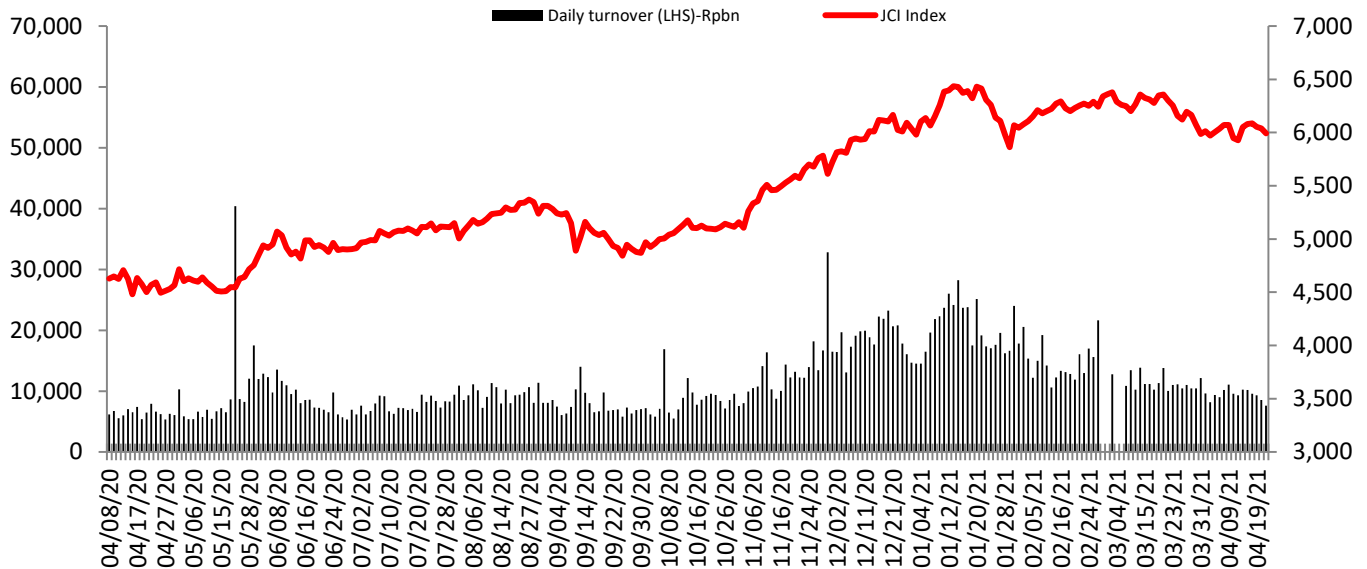


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ASSET MANAGEMENT

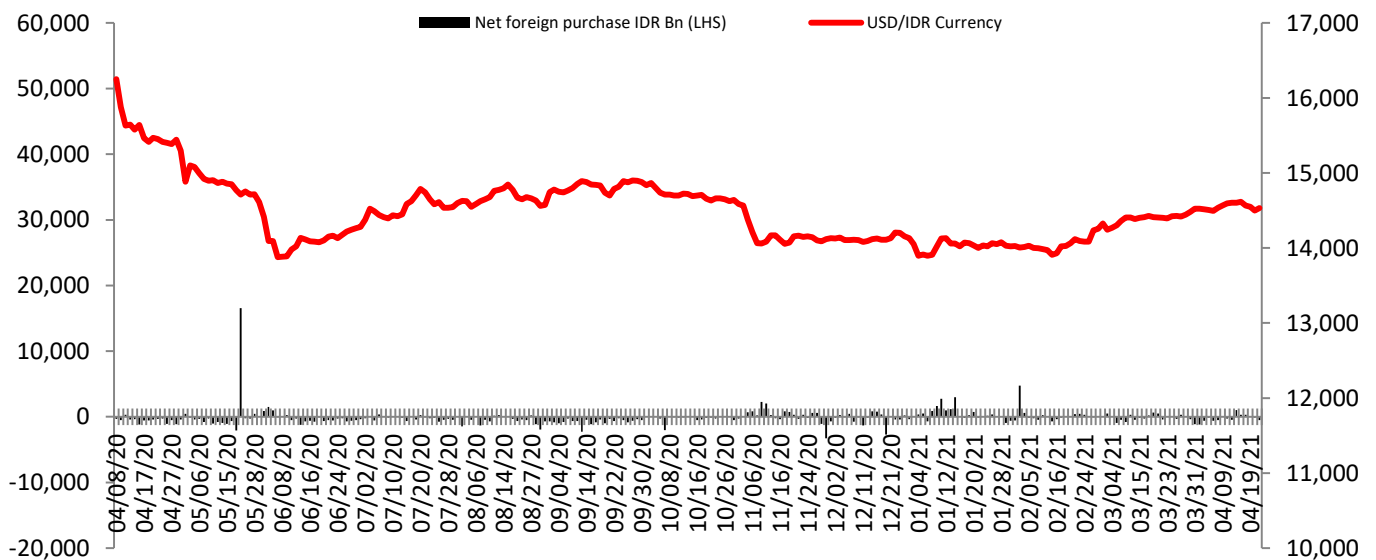
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## GRAPHS & TABLES

### 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	99.5	0.0	(2.2)	5Y
FR82	FR0082 Govt	100.5	(0.1)	(4.1)	10Y
FR80	FR0080 Govt	98.3	0.1		15Y
FR83	FR0083 Govt	102.7	0.0	(7.3)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	5,993.2	(0.7)	0.2	
Thailand	SET Index	1,580.0	(0.0)	9.0	
Korean Stock Exch.	KOSPI Index	3,171.7	(1.5)	10.4	
Straight Times	FSSTI Index	3,155.1	(1.2)	10.9	
Kuala Lumpur	KLCI Index	1,596.6	(0.7)	(1.9)	
Philippines	PCOMP Index	6,439.4	(0.9)	(9.8)	
Nikkei	NKY Index	28,508.6	(2.0)	3.9	
Hang Seng	HSI Index	28,621.9	(1.8)	5.1	
MSCI-Asia pacific	MXAP Index	207.9	(0.6)	4.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,821.3	(0.8)	10.5	
S&P 500	SPX Index	4,134.9	(0.7)	10.1	
Nasdaq	CCMP Index	13,786.3	(0.9)	7.0	
FTSE 100	UKX Index	6,867.7	0.1	6.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,530.0	(0.2)	(3.3)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,495.9	(0.5)	2.9
3 month	IDSWT3M Index	14,505.7	(0.4)	(2.9)
6 month	IDSWT6M Index	14,494.5	(0.5)	(2.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,541.8	(1.0)	(2.7)
6 month	IDFWT6M Index	14,612.5	(0.5)	(1.4)
				(0.9)

\*price as of 4/20/2021



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