

FOR PROFESSIONAL INVESTORS - 11/08/2021

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

EDGED HIGHER

JCI advanced and closed at 6,632 (+51 points or +0.77%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 463Bn today and rupiah slightly strengthened to IDR 14,258/USD.

Banking stocks were mixed as BBKA (+1.68%), BBNI (+1.44%), and BBTN (+1.99%) in green, while BBRI (-0.24%) and BMRI (-1.41%) retreated. Consumer names were mixed as ICBP (+1.14%), UNVR (+0.68%), and SIDO (+2.31%) rose, while KLBF (-0.61%) and HMSP (-0.5%) weakened. Mining stocks were positive as ADRO (+3.04%), INCO (+0.83%), PTBA (+1.13%), ITMG (+1.34%), and ANTM (+0.42%) all inched higher. Cement names were mixed as SMBR (-2.56%), INTP (-2.56%), and SMGR (-3.28%) closed lower, while SMCB unchanged. Other movers were BNBA (+25%), BBHI (+10.14%), MPPA (-6.61%), and CENT (-3.18%).

Indonesia's 3Q21 GDP is recorded at 3.51% YoY. Growth was seen in the automotive and transportation industry which grew by 27.64% YoY due to the luxury VAT incentive. The chemicals, pharmacy and traditional drugs grew by 9.71% YoY. Basic metals grew by 9.52% due to the increasing production to supply for foreign demand. The foods and beverage industry grew by 3.49% YoY.

BOND MARKET

FIRMER

Indonesia bond market opened the day firmer after UST rally last Friday. Buying interest are seen in tenor 10Y and longer as 10Y FR87 got taken to 102.5 (6.14%) and 11Y FR91 at 102.8 (6.01%) in the morning session. In second session, we did see some profit takers came in to the market. However, with limited supply due to auction cancellation, market remained well bid until closing time. At the end of the day, bonds yield closed 5 – 7 bps lower across the board. The yield of 5Y/10Y/15Y/20Y benchmark closed the day at mid-yield of 5.05%/6.14%/6.21%/6.87 % respectively.

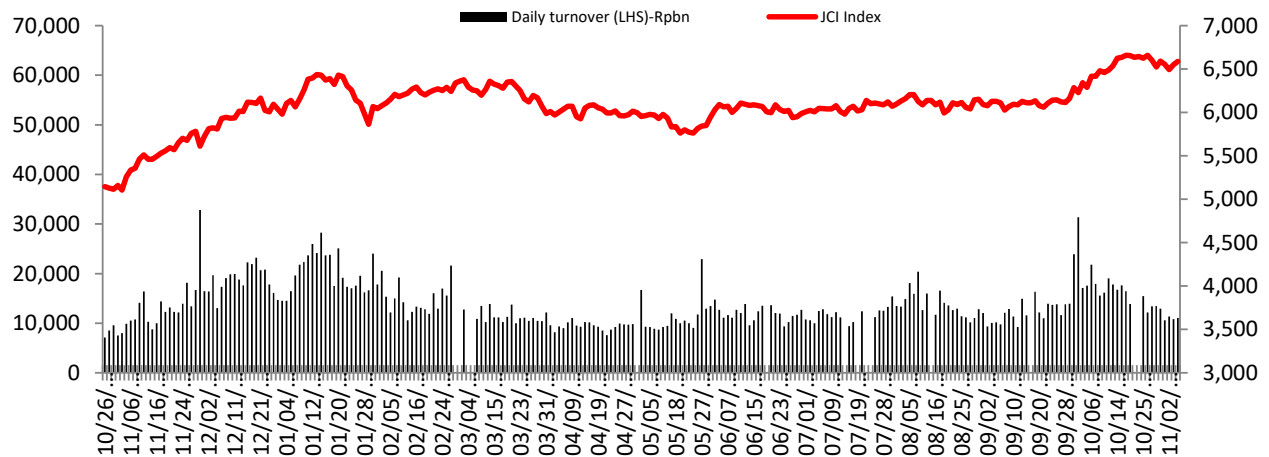


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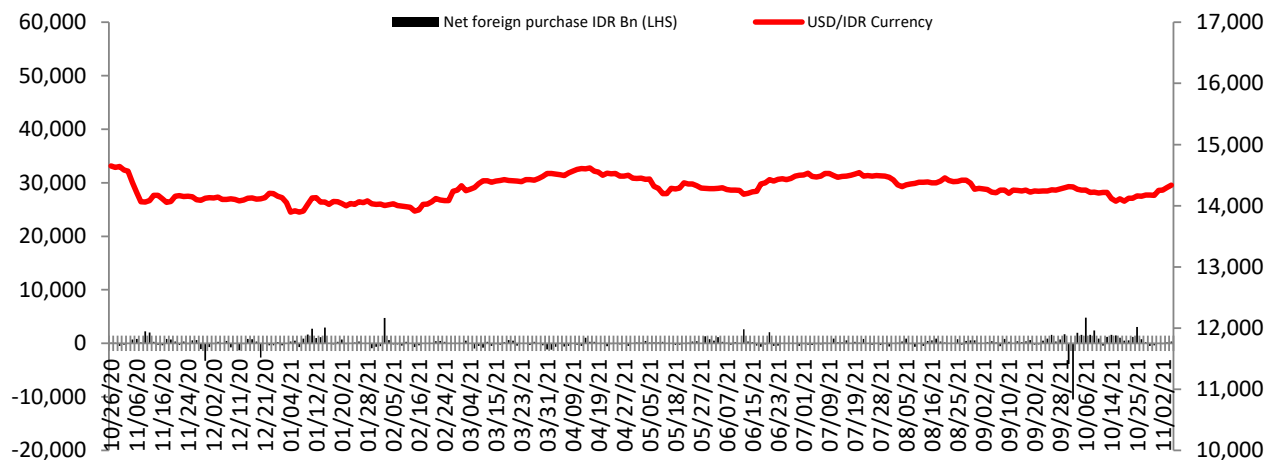
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GRAPHS & TABLES

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	101.7	0.0	0.0	5Y
FR82	FR0082 Govt	102.4	0.2	(2.2)	10Y
FR80	FR0080 Govt	100.3	0.1		15Y
FR83	FR0083 Govt	106.3	0.6	(4.0)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,632.3	0.8	10.9	
Thailand	SET Index	1,626.1	(0.0)	12.2	
Korean Stock Exch.	KOSPI Index	2,960.2	(0.3)	3.0	
Straight Times	FSSTI Index	3,263.9	0.7	14.8	
Kuala Lumpur	KLCI Index	1,535.4	0.2	(5.6)	
Philippines	PCOMP Index	7,396.2	0.8	3.6	
Nikkei	NKY Index	29,507.1	(0.4)	7.5	
Hang Seng	HSI Index	24,763.8	(0.4)	(9.1)	
MSCI-Asia pacific	MXAP Index	198.5	(0.4)	(0.7)	
<u>Global Indices</u>					
Dow Jones	INDU Index	36,328.0	0.6	18.7	
S&P 500	SPX Index	4,697.5	0.4	25.1	
Nasdaq	CCMP Index	15,971.6	0.2	23.9	
FTSE 100	UKX Index	7,304.0	0.0	13.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,258.0	0.5	(1.5)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,360.8	0.3	1.9
3 month	IDSWT3M Index	14,368.0	0.5	(1.9)
6 month	IDSWT6M Index	14,388.0	0.5	(2.0)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,409.4	0.1	(1.8)
6 month	IDFWT6M Index	14,534.3	(0.0)	(0.8)

*price as of 11/5/2021


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* PT BNP Asset Management (address: Sequis Tower, 29th Floor, Jl. Jend. Sudirman Kav. 71, SCBD Lot 11B, Jakarta 12190 - INDONESIA).

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