

FOR PROFESSIONAL INVESTORS - 09/14/2022

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### Near Highs

JCI advanced and closed at 7,318 (+64 points or +0.88%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net inflow of IDR 1420Bn today and rupiah was stabilized at IDR 14,852/USD.

Banking stocks were positive as BMRI (+3%), BBCA (+1.79%), MEGA (+5.24%), BBNI (+1.99%), and BBRI (+0.44%) all up. Consumer names were mixed as KLBF (+2.57%), UNVR (+2.64%), and MYOR (+1.41%) in green, while INDF (-0.4%) and ICBP (-0.87%) closed lower. Construction stocks were positive as WSKT (+5.5%), PTPP (+4.48%), WIKA (+2.4%), and ADHI (+4.91%) all up. Properties names were positive as CTRA (+4.5%), SMRA (+3.1%), PWON (+2.06%), and BSDE (+1.04%) all inched higher. Other movers were ARTO (+4.89%), ANTM (+4.55%), MAPA (-6.83%), and PANI (-6.74%).

Data on candidates for the wage subsidy assistance phase II is targeted to be ready this week so that assistance to reduce the impact of rising fuel prices can be immediately disbursed.

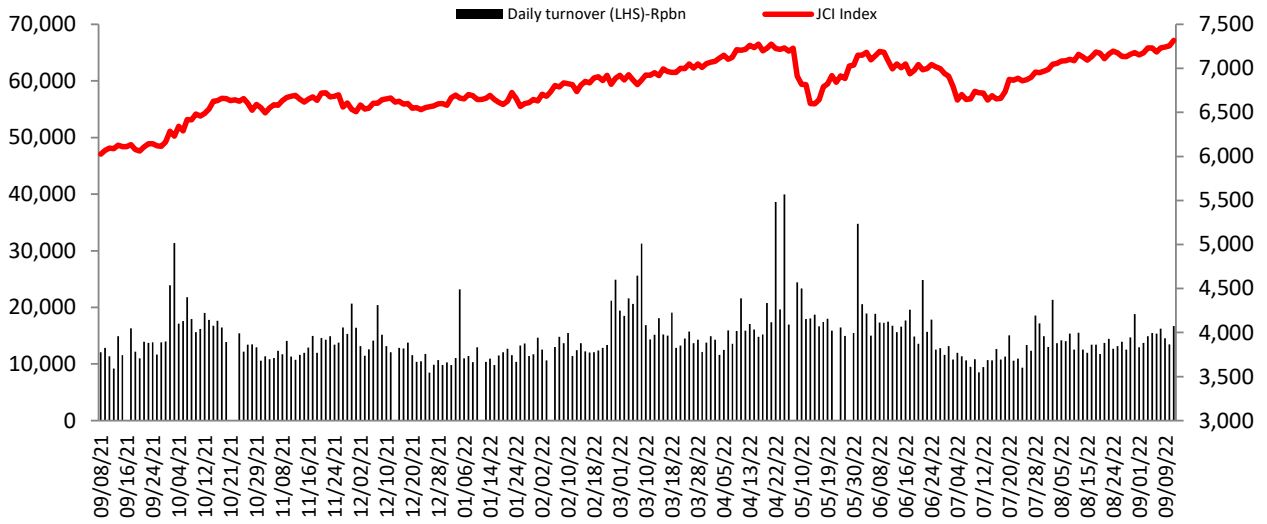
### BOND MARKET

#### AUCTION DAY

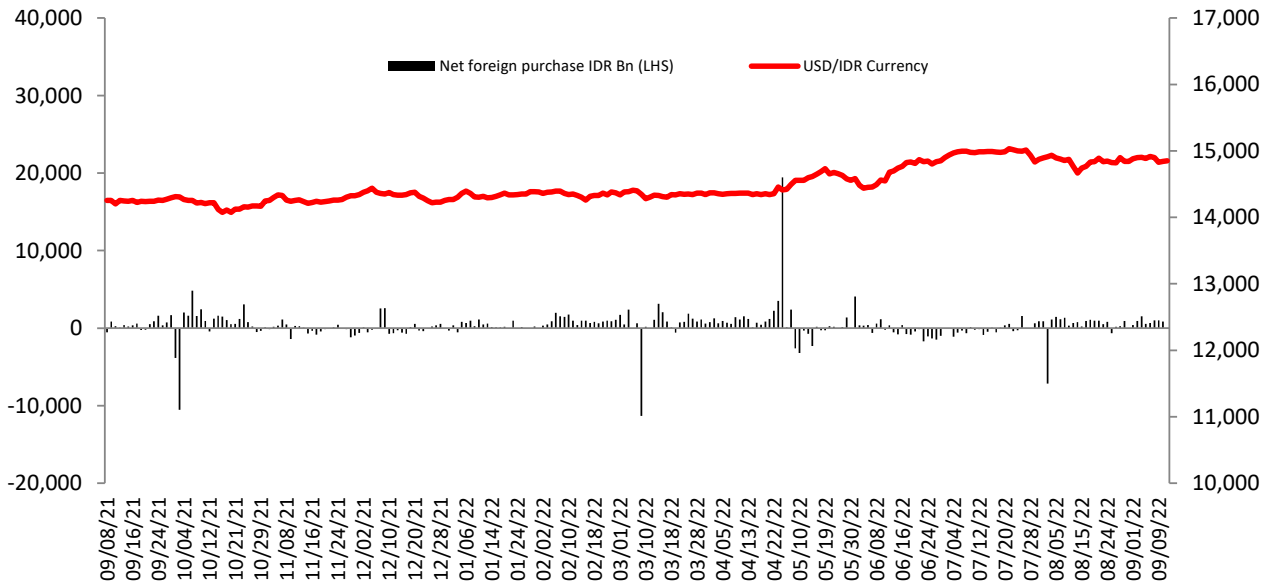
Indonesian bond market started the day softer following UST spike overnight to 3.37%. Market tone was relatively quiet ahead of the conventional auction. In today's auction, govt introduced a new 15Y tenor series FR98 which caught the market attention. The incoming bid were higher than the previous auction at IDR 52.06tn, on which half of it went to 10Y FR96 and 15Y FR98. After MoF released the incoming bids data, market tone turned biddish with interest seen mostly on the short to belly part of the curve. The 10Y FR96 got taken to 99.3 (7.09%) while the 10Y FR91 got taken to 95.25 (7.06%). MoF then announced the auction result which was same as the target at IDR 19tn. The series absorbed (against incoming bids) on the auction were IDR 1tn (IDR 6.93tn) 3mo SPN, IDR 3tn (IDR 6.3tn) 1Y SPN, IDR 3.25tn (IDR 8.9tn) 5Y FR95, IDR 5.35tn (IDR 14.89tn) 10Y FR96, IDR 3.6tn (IDR 11.19tn) 15Y FR98, IDR 1.7tn (IDR 2.45tn) 20Y FR97, and IDR 1.1tn (IDR 1.37tn) 29Y FR89 at cut off yields of 2.4%, 3.75%, 6.65%, 7.14%, 7.20%, 7.19%, and 7.28% respectively.

# 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	94.8	0.1	(6.0)	5Y
FR82	FR0082 Govt	95.0	0.2	(5.7)	10Y
FR80	FR0080 Govt	95.8	1.0		15Y
FR83	FR0083 Govt	99.9	#VALUE!	(2.6)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,318.0	0.9	11.2	
Thailand	SET Index	1,667.3	0.1	0.6	
Korean Stock Exch.	KOSPI Index	2,449.5	2.7	(17.7)	
Straight Times	FSSTI Index	3,294.1	0.6	5.5	
Kuala Lumpur	KLCI Index	1,486.6	(0.8)	(5.2)	
Philippines	PCOMP Index	6,701.8	(0.2)	(5.9)	
Nikkei	NKY Index	28,614.6	0.3	(0.6)	
Hang Seng	HSI Index	19,326.9	(0.2)	(17.4)	
MSCI-Asia pacific	MXAP Index	155.6	0.8	(19.4)	
<u>Global Indices</u>					
Dow Jones	INDU Index	32,381.3	0.7	(10.9)	
S&P 500	SPX Index	4,110.4	1.1	(13.8)	
Nasdaq	CCMP Index	12,266.4	1.3	(21.6)	
FTSE 100	UKX Index	7,484.0	0.1	1.3	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,852.0	(0.1)	(4.0)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,839.8	0.0	4.1
3 month	IDSWT3M Index	14,835.0	(0.0)	(3.9)
6 month	IDSWT6M Index	14,848.5	(0.4)	(4.1)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,850.0	0.0	(3.8)
6 month	IDFWT6M Index	14,870.0	(0.0)	(3.4)
				(3.3)

\*price as of 9/13/2022

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