

FOR PROFESSIONAL INVESTORS - 01/04/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Lower on Close

JCI weakened and closed at 6,813 (-76 points or -1.1%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net outflow of IDR 438Bn today and rupiah was stabilized at IDR 15,588/USD.

Banking stocks were mostly negative as MEGA (-0.92%), BBNI (-1.08%), BBRI (-1.65%), and BBKA (-2.34%) all retreated, except BMRI (+0.75%). Consumer names were mixed as INDF (+1.48%), MYOR (+3.15%), and UNVR (+0.87%) inched higher, while ICBP (-0.74%) and KLBF (-1.42%) weakened. Mining stocks were mixed as ANTM (+2.5%) and INCO (+2.82%) rose, while PTBA (-2.95%), ITMG (-3.91%), and ADRO (-6.25%) weakened. Telco names were negative as ISAT (-0.79%), FREN (-2.82%), and TLKM (-1.04%) all corrected. Other movers were APEX (+34.48%), SHID (+10.88%), MIKA (-6.86%), and UNTR (-6.76%).

PT Pertamina has adjusted prices for its fuel oil as of 3-Jan. Pertamax is adjusted to IDR12,800/liter, Pertamax Turbo is adjusted to IDR14,050, Dexlite is adjusted to IDR16,150/liter, and Pertamina Dex is adjusted to IDR16,750 from IDR18,800. These new prices applies to provinces with a motor vehicle fuel tax (PBBKB) of 5% such as in the DKI Jakarta area.

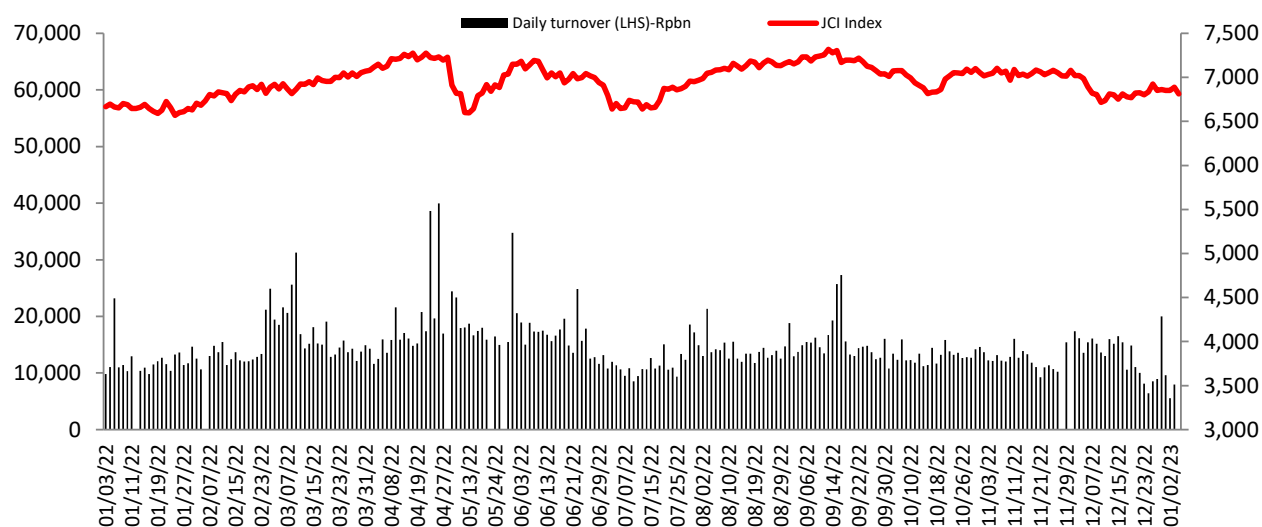
BOND MARKET

Little Change

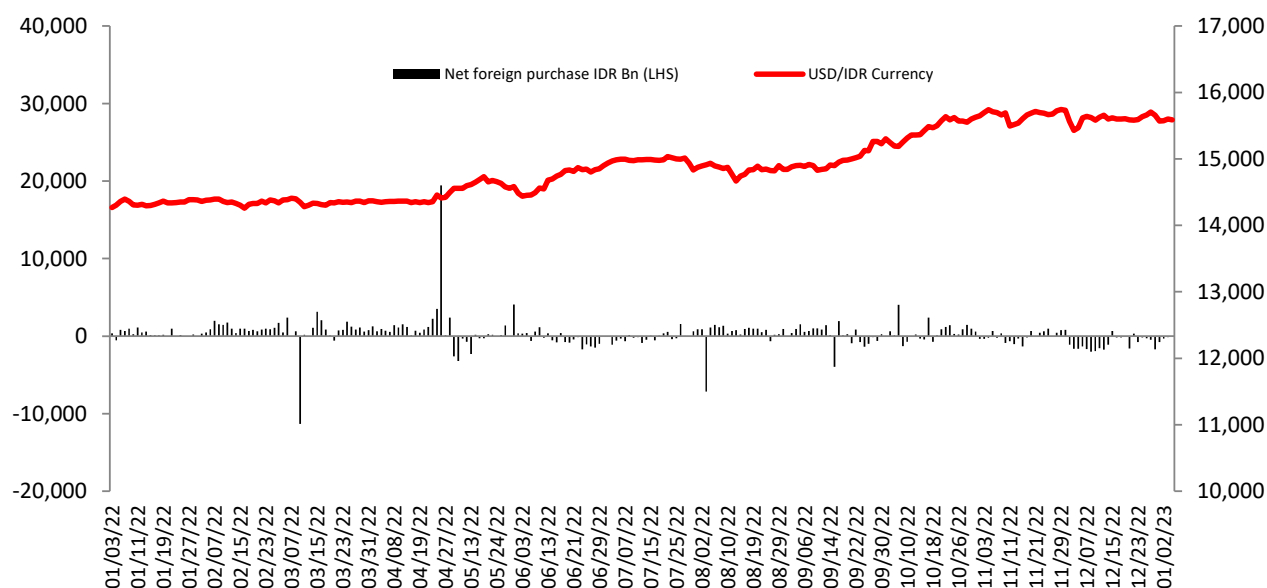
Indonesia bond market traded mixed today. Several unabsorbed bidders turned to secondary market. Market players were keen hunting the fav benchmark series, 10Y FR96. However, several mixed activities were seen especially on 5Y and 10Y non benchmark series but the trade volumes were small until the trading session end. Overall, the 5Y/10Y/15Y/20Y benchmark yield closed the day with yield movement -3/-2/-1/-2.

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	96.1	(0.0)	(0.1)	5Y
FR82	FR0082 Govt	95.7	0.1	(0.6)	10Y
FR80	FR0080 Govt	95.8	(0.6)	(0.6)	15Y
FR83	FR0083 Govt	100.2	0.1	(0.1)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,813.2	(1.1)	(0.5)	
Thailand	SET Index	1,674.5	(0.3)	0.4	
Korean Stock Exch.	KOSPI Index	2,256.0	1.7	0.9	
Straight Times	FSSTI Index	3,244.9	(0.0)	(0.2)	
Kuala Lumpur	KLCI Index	1,469.6	(0.3)	(1.7)	
Philippines	PCOMP Index	6,718.5	2.0	2.3	
Nikkei	NKY Index	25,716.9	(1.4)	(1.4)	
Hang Seng	HSI Index	20,793.1	3.2	5.1	
MSCI-Asia pacific	MXAP Index	156.7	0.6	0.6	
<u>Global Indices</u>					
Dow Jones	INDU Index	33,136.4	(0.0)	(0.0)	
S&P 500	SPX Index	3,824.1	(0.4)	(0.4)	
Nasdaq	CCMP Index	10,387.0	(0.8)	(0.8)	
FTSE 100	UKX Index	7,568.1	0.2	1.6	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,588.0	0.1	(0.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,570.0	(1.0)	(1.0)
3 month	IDSWT3M Index	15,600.2	0.2	(0.1)
6 month	IDSWT6M Index	15,580.0	(0.1)	0.0
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,583.9	0.1	(0.1)
6 month	IDFWT6M Index	15,643.7	(0.1)	0.0
			(0.2)	(0.2)

*price as of 1/4/2023


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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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