

FOR PROFESSIONAL INVESTORS - 08/08/2022

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

FLAT

JCI was flat and closed at 7,087 (+2 points or +0.03%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 1.19Tn today and rupiah slightly strengthened to IDR 14,878/USD.

Banking stocks were mostly positive as BMRI (+1.21%), BBRI (+0.23%), MEGA (+1.49%), and BBTN (+2.33%) all in green, except PNB (-1.12%). Consumer names were mixed as KLBF (+1.57%) and UNVR (+1.48%) advanced, while HMSP (-0.54%), SIDO (-1.32%), and GGRM (-1.56%) declined. Retailer stocks were positive as MAPI (+2.08%), ACES (+2.17%), LPPF (+1.55%), and MAPA (+3.37%) all in green. Telco names were mixed as TLKM (+1.08%) and EXCL (+0.77%) advanced, while FREN (-4.59%) weakened. Other movers were BUMI (+5.61%), MDKA (+4.18%), BIPI (-4.64%), and TBIG (-3.21%).

As fuel price continues to remain elevated, Ministry of Transport issue a regulation to allow airlines to increase prices of its flight tickets max 15% from the maximum limit rate for jets and max 25% for propeller planes

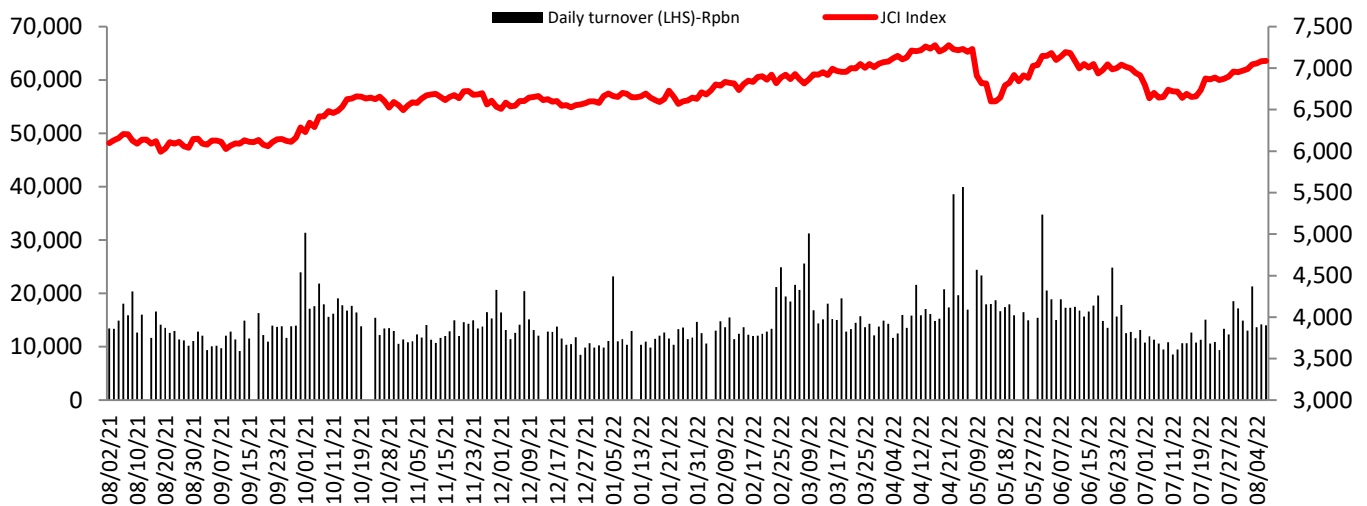
BOND MARKET

TRADING HIGHER

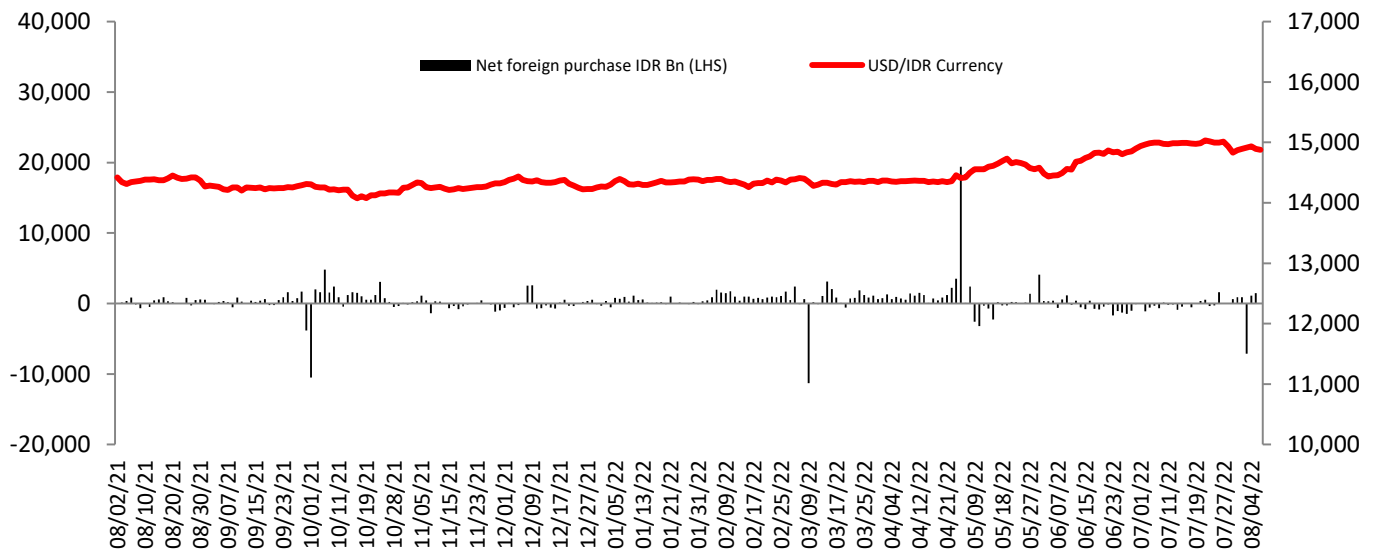
The bond market managed to end slightly higher today after government announced 2Q20 GDP which was printed 5.44% YoY higher against consensus 5.17% YoY. Support were seen from the mixed players that trying to collect 5Y and 10Y benchmark and non-benchmark series as soon as market opened while we did see some profit takers came in. At the end of the day, bonds yield closed 7 to 10 bps lower. The benchmark series of 5, 10, 15 and 20Y closed at mid-yield of 6.35%, 7.09%, 6.98% and 7.16% 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	94.9	0.0	(5.9)	5Y
FR82	FR0082 Govt	94.8	0.1	(5.9)	10Y
FR80	FR0080 Govt	94.4	(0.1)		15Y
FR83	FR0083 Govt	99.2	0.0	(3.3)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	7,086.8	0.0	7.7	
Thailand	SET Index	1,603.1	0.1	(3.3)	
Korean Stock Exch.	KOSPI Index	2,493.1	0.1	(16.3)	
Straight Times	FSSTI Index	3,270.4	(0.4)	4.7	
Kuala Lumpur	KLCI Index	1,496.0	(0.4)	(4.6)	
Philippines	PCOMP Index	6,434.2	0.4	(9.7)	
Nikkei	NKY Index	28,249.2	0.3	(1.9)	
Hang Seng	HSI Index	20,045.8	(0.8)	(14.3)	
MSCI-Asia pacific	MXAP Index	160.7	0.2	(16.8)	
<u>Global Indices</u>					
Dow Jones	INDU Index	32,803.5	0.2	(9.7)	
S&P 500	SPX Index	4,145.2	(0.2)	(13.0)	
Nasdaq	CCMP Index	12,657.6	(0.5)	(19.1)	
FTSE 100	UKX Index	7,462.5	0.3	1.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,878.0	0.1	(4.2)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,895.0	0.2	4.5
3 month	IDSWT3M Index	14,903.2	(0.2)	(4.4)
6 month	IDSWT6M Index	14,898.1	(0.3)	(4.4)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,907.0	0.1	(4.2)
6 month	IDFWT6M Index	14,933.0	(0.1)	(3.8)
				(4.5)

*price as of 8/6/2022

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