

FOR PROFESSIONAL INVESTORS - 03/01/2023

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Choppy

JCI was flat and closed at 6,845 (+2 points or +0.02%) today. Shares across regional markets were mixed. Meanwhile, foreign investors recorded net inflow of IDR 848Bn today and rupiah was stabilized at IDR 15,235/USD.

Banking stocks were mostly positive as BBRI (+1.07%), BMRI (+1%), BBNI (+1.99%), and PNB (2.08%) all advanced, except BBKA (-1.71%). Consumer names were negative as UNVR (-0.72%), HMSP (-2.11%), GGRM (-4.4%), ICBP (-2.22%), and INDF (-3.09%) all retreated. Material stocks were negative as TPIA (-0.87%) and BRPT (-6.95%) all down. Telco names were mixed as TLKM (+1.29%) up, while FREN (-1.49%) and EXCL (-1.44%) down. Other movers were ARTO (+7.17%), PNL (6.03%), TOWR (-3.33%), and BSDE (-3.03%).

MoF targets govt. spending to reach IDR3,207-IDR3,461tn in 2024, up from 2023's IDR3,061. Most of the increase is attributed to increasing municipal fund transfers and central govt., aiming to reduce stunting and poverty, control inflation, and increase investments.

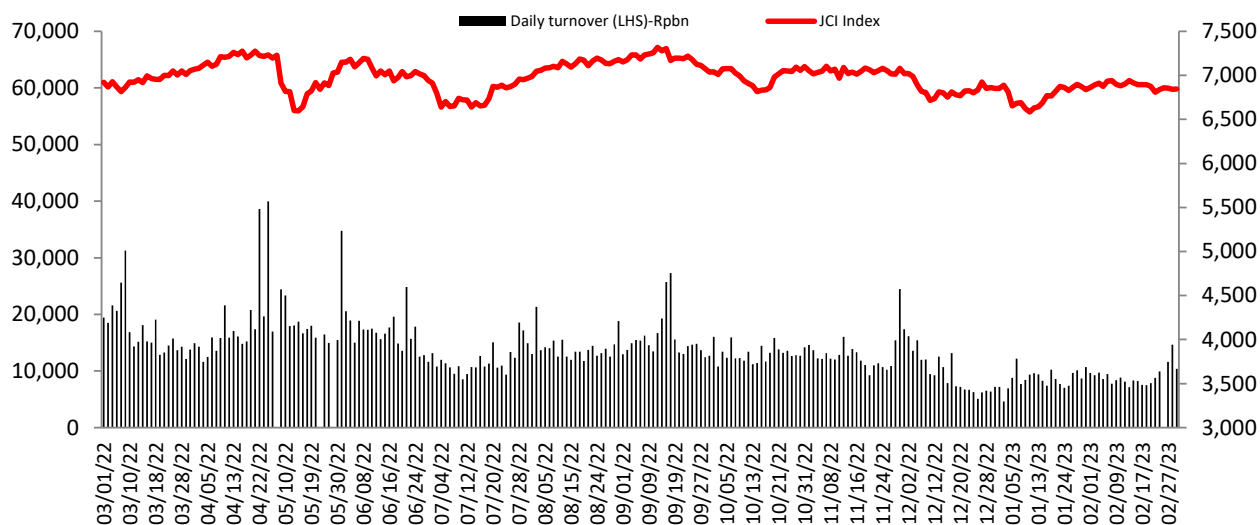
BOND MARKET

TWO WAYS TRADING

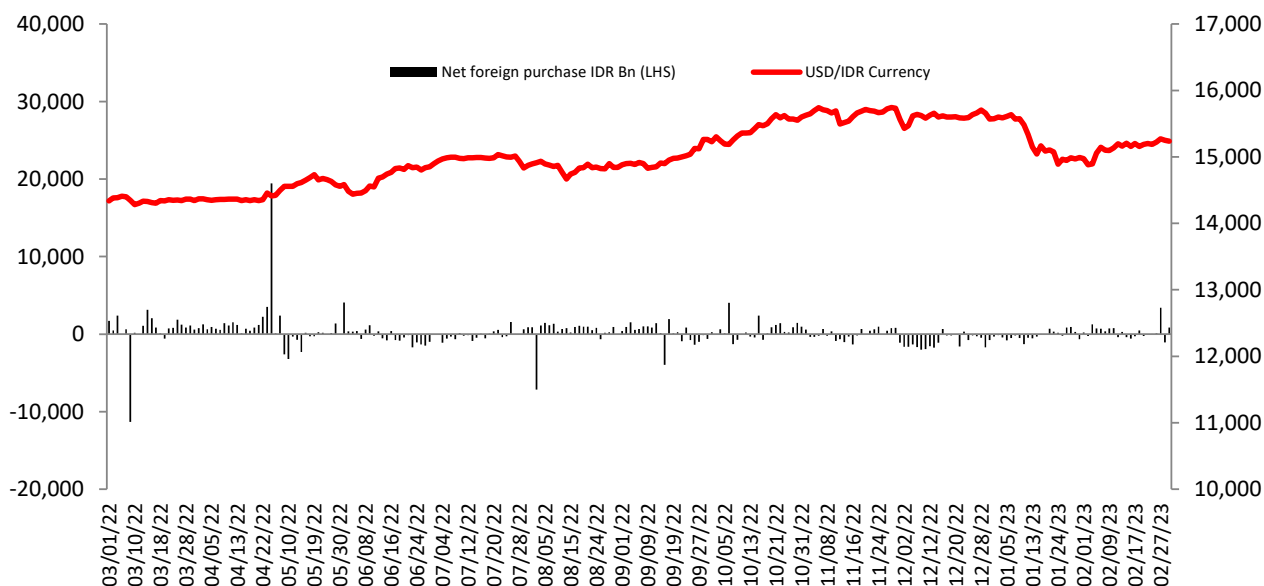
Indonesia bond market closed the day with lower yield around 4 – 6 bps post yesterday auction. In the morning session, we witnessed two ways trading in the market. Mixed trading was seen with offshore names and auction winners were on the sell side while local and unabsorbed bidder on the buy side. The second session, market started off quiet. Nearing market closed, some buying actions in benchmark series was seen specially on 5Y FR95 and 10Y FR96. Today spot opened at 15,230/250 and closed at 15,245/255

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	95.2	(0.0)	(1.0)	5Y
FR82	FR0082 Govt	97.3	0.1	0.9	10Y
FR80	FR0080 Govt	97.0	0.0	0.6	15Y
FR83	FR0083 Govt	100.6	#VALUE!	0.3	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,844.9	0.0	(0.1)	
Thailand	SET Index	1,620.0	(0.1)	(2.9)	
Korean Stock Exch.	KOSPI Index	2,412.9	0.4	7.9	
Straight Times	FSSTI Index	3,255.1	(0.2)	0.1	
Kuala Lumpur	KLCI Index	1,450.2	(0.3)	(3.0)	
Philippines	PCOMP Index	6,607.1	0.8	0.6	
Nikkei	NKY Index	27,516.5	0.3	5.4	
Hang Seng	HSI Index	20,619.7	4.2	4.2	
MSCI-Asia pacific	MXAP Index	158.0	(0.2)	1.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	32,656.7	(0.7)	(1.5)	
S&P 500	SPX Index	3,970.2	(0.3)	3.4	
Nasdaq	CCMP Index	11,455.5	(0.1)	9.4	
FTSE 100	UKX Index	7,904.6	0.4	6.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	15,235.0	0.1	2.2
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	15,273.5	0.4	(2.9)
3 month	IDSWT3M Index	15,237.9	(0.2)	2.2
6 month	IDSWT6M Index	15,241.5	(0.2)	2.2
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	15,255.9	(0.2)	2.0
6 month	IDFWT6M Index	15,273.3	(0.2)	2.4

*price as of 2/28/2023



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