



FOR PROFESSIONAL INVESTORS - 09/10/2021

# DAILY REPORT

## INDONESIA MARKET WRAP

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### EQUITY MARKET

#### FLAT

JCI slightly strengthened and closed at 6,095 (+27 points or +0.44%) today. Shares across regional markets were positive. Meanwhile, foreign investors recorded net inflow of IDR 257Bn today and rupiah slightly strengthened to IDR 14,203/USD.

Banking stocks were mixed as BBRI (+1.34%), BBNI (+0.93%), and MEGA (+0.65%) inched higher, while BBKA (-0.76%) and BMRI (-2.36%) retreated. Consumer names were mostly negative as INDF (-0.8%), UNVR (-0.49%), GGRM (-1.19%), and KLBK (-1.34%) all weakened, except MYOR (+3.57%). Material stocks were mixed as TPIA (+5.11%) rose, while BRPT (-0.5%) weakened. Mining names were mixed as ANTM (+6.15%), INCO (+0.98%), and TINS (+2.33%) in green, while ITMG (-1.01%) and ADRO (-1.1%) corrected. Other movers were BBHI (+24.67%), BBYB (+12.08%), POLL (-7%), and MCAS (-5.5%).

The gov't plans to expand the imposition of plastic excise on plastic packaging and containers, such as diapers and disposable cutlery, next year. The Indonesian Olefin, Aromatic and Plastic Industry Association (Inaplas) rejected the policy because it could hit the petrochemical industry.

### BOND MARKET

#### LITTLE CHANGE

Indonesia bond market closed the week with better sentiment. In the morning session, biddish tone was heard led by 10Y areas followed by other series. Today's market players was still dominated from onshore foreign banks. Overall, IDR bonds yield went down 2 – 3 bps compared to yesterday closing. The yield of 5/10/15/20Y benchmark closed the day at mid-yield of 5.04%/6.12%/6.26%/6.85% respectively.

There will be fresh supply next week as Indonesia Debt Management Office ("DMO") will hold conventional bond auction with IDR 21Tn issuance target with max upside IDR 31.5Tn. The series that will be issued are 3M SPN, 12M SPN, 6Y FR90, 11Y FR91, 15Y FR88, 21Y FR92 and 30Y FR89.

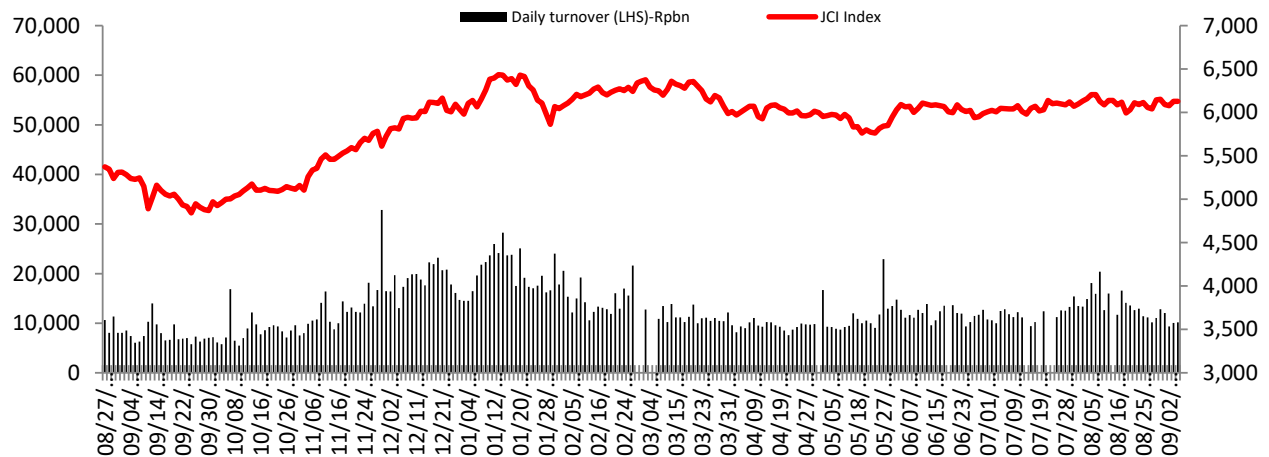


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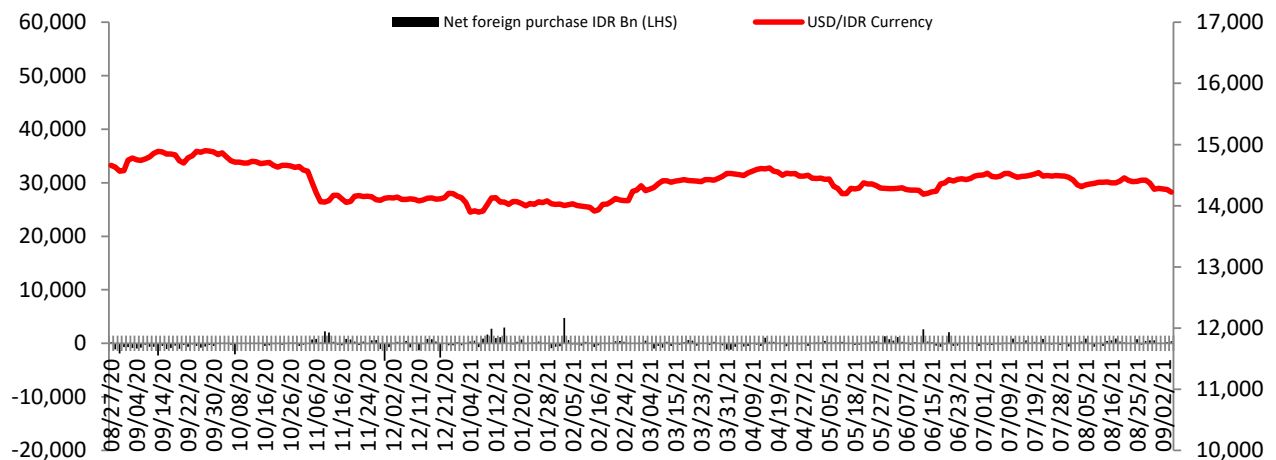
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## GRAPHS & TABLES

### 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	101.9	0.1	0.2	5Y
FR82	FR0082 Govt	102.6	0.2	(2.0)	10Y
FR80	FR0080 Govt	99.8	0.0		15Y
FR83	FR0083 Govt	106.7	0.1	(3.7)	20Y
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	6,094.9	0.4	1.9	
Thailand	SET Index	1,635.4	0.4	12.8	
Korean Stock Exch.	KOSPI Index	3,125.8	0.4	8.8	
Straight Times	FSSTI Index	3,098.8	0.9	9.0	
Kuala Lumpur	KLCI Index	1,576.0	(0.2)	(3.1)	
Philippines	PCOMP Index	6,970.5	0.7	(2.4)	
Nikkei	NKY Index	30,381.8	1.2	10.7	
Hang Seng	HSI Index	26,205.9	1.9	(3.8)	
MSCI-Asia pacific	MXAP Index	204.7	(1.0)	2.4	
<u>Global Indices</u>					
Dow Jones	INDU Index	34,879.4	(0.4)	14.0	
S&P 500	SPX Index	4,493.3	(0.5)	19.6	
Nasdaq	CCMP Index	15,248.3	(0.3)	18.3	
FTSE 100	UKX Index	7,049.4	0.4	9.1	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Curncy	14,203.0	0.4	(1.1)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	14,266.9	0.0	1.3
3 month	IDSWT3M Index	14,265.8	(0.0)	(1.2)
6 month	IDSWT6M Index	14,275.3	0.0	(1.2)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	14,319.6	0.1	(1.1)
6 month	IDFWT6M Index	14,386.7	(0.9)	0.2
			(0.0)	

\*price as of 9/9/2021


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