

DAILY REPORT

INDONESIA MARKET WRAP - FOR PROFESSIONAL INVESTORS

EQUITY MARKET

HIT HARD

JCI reopened after a long break at a lower level and closed at 5884 (-109 points or -1.83%). Regional markets mostly rebounded positively. Foreign recorded net sell of IDR2.04tn.

Big banks tanked as BBKA (-3.37%), BBRI (-5.73%), BMRI (-3.60%) and BBNI (-6.52%) down. Consumer stocks also down as HMSP (-3.02%), UNVR (-2.48%), ICBP (-2.82%) and GGRM (-1.81%) in red. Infra stocks were mixed as TLKM (+2.77%) up but EXCL (-4.18%), PGAS (-1.92%) and JSMR (-2.60%). Retailers ended weaker with AMRT (-3.97%), RALS (-5.70%), MAPI (-3.39%) and ACES (-5.15%). Property stocks also fell as PWON (-6.78%), BSDE (-2.91%), CTRA (-5.07%) and SMRA (-7.54%) down. Construction stocks also tumbled as ADHI (-2.08%), WSKT (-6.81%), WIKA (-4.63%) and PTPP (-7.20%) down. Coals were quite mixed with ADRO (+3.36%) and PTBA (+4.18%) up while ITMG (-4.81%), UNTR (-3.74%), DOID (-4.40%) and BUMI (-1.53%) down. Other movers today were TPIA (-5.60%), INTG (-6.67%), CPIN (+9.83%), INKP (+4.71%), ASII (+0.72%), DSSA (+12.90%), and SIDO (+8.88%).

E-commerce transaction saw strong growth during Lebaran. Shopee Indonesia commented that its transactions during Big Ramadan Sale saw 500% increase compared to 2017's Lebaran. Separately, Tokopedia and Bukalapak also stated that they saw strong consumer transaction growth.

BOND MARKET

MUTE

Indonesia bond market was totally quiet throughout the day since most of market players still on Eid holiday. No trade was heard at least from our side. Prices were quoted unchanged and spread widened with local currency stay at 13923 throughout the day. Total foreign ownership rose to IDR 844.53tn on 7th June 2018 from IDR 833.81tn on 31 May 2018.

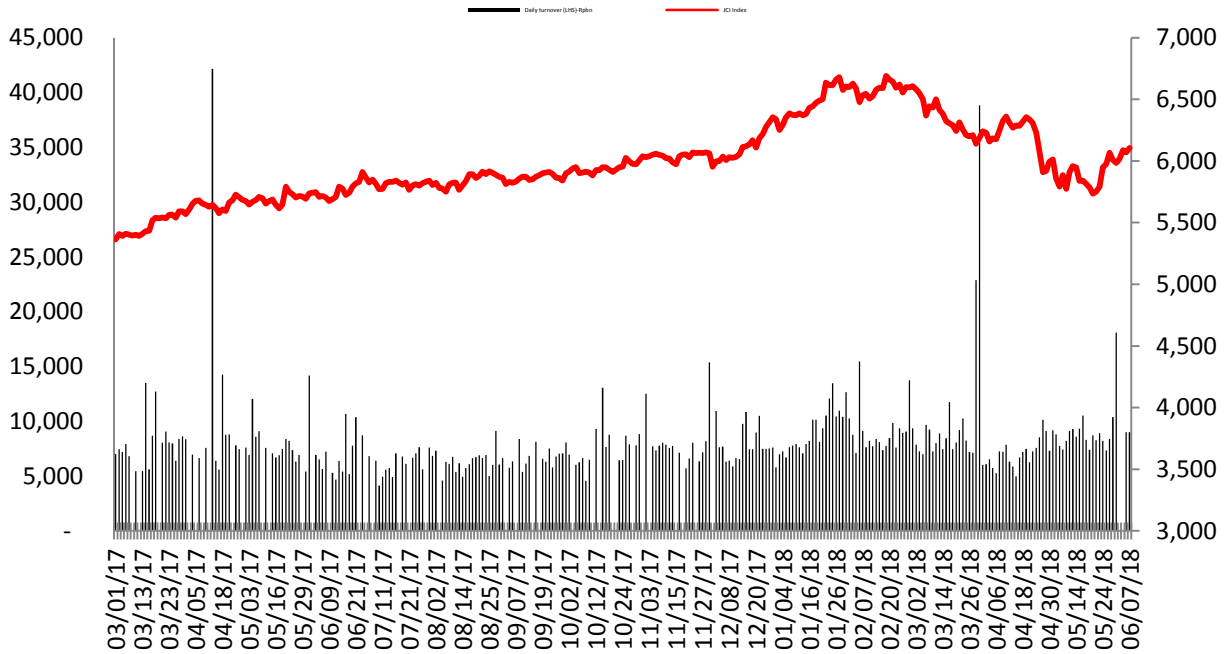


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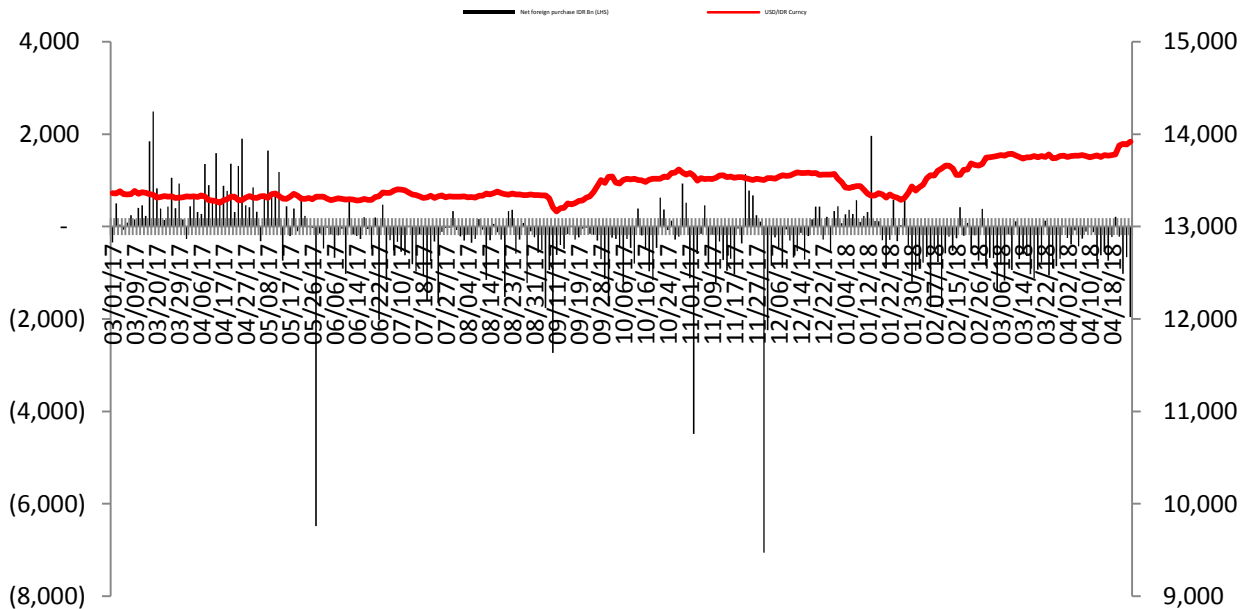
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GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
Bonds					
FR61	FR0061 Govt	100.2	0.02	(3.76)	5Y
FR59	FR0059 Govt	98.3	0.25	(6.38)	10Y
FR74	FR0074 Govt	98.1	0.02	(7.02)	15Y
FR72	FR0072 Govt	103.3	0.04	(7.47)	20Y
Asia Pacific					
Jakarta Composite	JCI Index	5,884.0	(1.83)	(7.42)	
Thailand	SET Index	1,664.3	1.51	(5.10)	
Korean Stock Exch.	KOSPI Index	2,363.9	1.02	(4.20)	
Straight Times	FSSTI Index	3,315.9	0.44	(2.56)	
Kuala Lumpur	KLCI Index	1,709.8	(0.33)	(4.85)	
Philippines	PCOMP Index	7,261.6	(0.70)	(15.15)	
Nikkei	NKY Index	22,555.4	1.24	(0.92)	
Hang Seng	HSI Index	29,696.2	0.77	(0.75)	
MSCI-Asia pacific	MXAP Index	168.8	(1.63)	(2.90)	
Global Indices					
Dow Jones	INDU Index	24,700.2	(1.15)	(0.08)	
S&P 500	SPX Index	2,762.6	(0.40)	3.33	
Nasdaq	CCMP Index	7,725.6	(0.28)	11.91	
FTSE 100	UKX Index	7,695.7	1.21	0.10	
Currency					
	Bloomberg Code	IDR	% Chg D-D	% Chg. YTD	
Spot IDR	IDR Curncy	13,894	(0.43)	(2.60)	
Sw ap-IDR					
1 month	IDSWT1M Index	13,885	0.22	2.40	
3 month	IDSWT3M Index	13,931	0.37	(2.76)	
6 month	IDSWT6M Index	13,924	0.36	(2.70)	
Forw ard-IDR					
3 month	IDFWT3M Index	13,988	0.37	(2.91)	
6 month	IDFWT6M Index	14,071	(0.48)	(2.64)	
Indonesia Bond Index					
BBG Sov ID Index*	BINDO Index	225.71	0.09	(1.84)	

*price as of 6/19/2018

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