

# Evening Update

## Indonesia Market Wrap

Pada perdagangan awal pekan ini indeks harga saham gabungan ditutup di zona merah dipicu oleh sikap hati-hati investor menanti kelanjutan kesepakatan dagang antara AS dan China. Sementara itu melemahnya nilai tukar rupiah serta sejumlah harga komoditas yaitu nikel, timah, emas juga menjadi tambahan katalis negatif di pasar. IHSG terkoreksi -5 poin (-0,09%) pada level 6.122. Sektor infrastruktur dan perdagangan yang masing-masing berkurang -12 poin (-1,09%) dan -3 poin (-0,45%) menjadi kontributor terbesar bagi pelemahan indeks hari ini. Sementara itu nilai tukar rupiah terhadap dolar Amerika diperdagangkan melemah tipis -2 poin (-0,01%) pada level Rp14.078. Investor asing mencatatkan penjualan bersih (*foreign net sell*) sebesar Rp421,4 miliar di pasar reguler.

Items	Avg 2019	Terakhir	H-1
Nilai transaksi (Rp miliar)	5.296,5	4.656,8	7.270,0
Volume transaksi (t. shm)	4.957,8	4.482,2	5.084,3
Netas ing (Rp miliar)	65,7	64,9	-221,7
Netas ing (t. shm)	-150,6	94,0	-572,0
Kapitalisasi pasar (Rp trn)	5.376,3	6.832,4	6.799,6

Index	Penutupan	1 year return	1 day return	YTD return
Agrif	13,86	-4,1%	-0,9%	-14%
Basic Industry	9,55	20,5%	1,7%	1,7%
Consumer	2,067	-1,19%	-0,3%	-0,6%
Finance	12,64	1,1%	1%	7,5%
Infrastructure	14	4,5%	0,5%	7,2%
Misc. Industry	1,178	-16,9%	-0,5%	-15,5%
Mining	14,79	-20,7%	-1,8%	-16,8%
Property	5,08	20,9%	-0,2%	15,5%
Trade	7,87	-3,0%	-0,9%	0,3%

Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	6,128	1,9%	0,5%	-1,1%
FSSTI	Singapura	3,239	5,0%	0,2%	5,5%
KLCI	Malaysia	15,95	-4,5%	0,1%	-5,7%
SET	Thailand	16,02	-2,0%	-0,4%	2,5%
KOSPI	Korea	2,162	3,3%	1%	5,6%
SENSEX	India	40,357	1,8%	0,2%	1,9%
HSI	Hongkong	26,327	0,5%	0,0%	1,9%
NKY	Jepang	23,303	7,5%	0,7%	14,4%
ASX	Australia	6,899	1,5%	0,9%	20,1%
IBOV	Brazil	106,557	23,9%	0,5%	2,1%
DJI	Amerika	28,005	1,2%	0,8%	20,1%
SX5P	Eropa	3,337	1,5%	0,2%	20,9%
UKX	Inggris	7,303	4,1%	0,1%	8,5%

Dual Listing (US\$)	Closing		Daily	
	US\$	IDR	Δ	% chg
TLKM	29,13	2,052,1	0,13	0,45%
TINS	0,045	638,6	0,00	2,50%
ANTM	0,048	669,8	0,00	0,00%
*Rp/US\$	14,080			

Suku Bunga & Inflasi	Latest		Real interest rate	
	Interest	Inflation		
Deposito IDR 3 bln	5,52			
Kredit Bank IDR	10,06			
B17-Days R.R	5,00%	3,4%		0,02
Fed Funds Target	1,75	1,80%		1,73
ECB Main Refinancing	-	0,70%		(0,01)
Domestic Yen Interest Call	(0,06)	0,20%		(0,07)

Item US\$	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
(in USD)				
Minyak WTI/bbl	57,7	2,2%	0,9	1,6%
CO2 ton	62,80	31,7%	-6,3	-0,9%
Karet/kg	1,64	-22,2%	0,0	-1,0%
Nikel/ton	11,967	33,8%	-1,7	-1,2%
Timah/ton	6,074	-7,2%	-1,6	-0,7%
Emas/oz	146,83	20,2%	-3,1	-0,2%
Batu bara/ton	67,2	-35,5%	0,5	0,6%
Tepong Terigu/ton	116,5	-7,0%	8,1	5,8%
Jagung ushel	3,6	9,1%	0,0	-1,3%
Kedelai	9,0	8,6%	0,0	0,1%
Tembaga	5,825,5	-6,0%	37,8	0,6%

Sumber: Bloomberg

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
BYAN	15.800	2.500	BRAM	11.250	2.800
TEBE	1.640	545	MREI	4.000	980
LIFE	5.150	520	SLIS	4.560	540
MAYA	7.900	400	ENVY	1.555	515
TCPI	5.175	395	UNTR	21.900	475

Source: IPOT

Top Foreign Buy			Top Foreign Sell		
Ticker	NBVal (B)	NBLot	Ticker	NSVal (B)	NSLot
BBRI	77	189.610	TLKM	192	480.102
INDF	16	20.377	BBCA	163	52.316
CTRA	9	83.627	SMGR	29	23.362
ADRO	8	60.343	BMRI	28	41.324
BNLI	8	75.055	AKRA	28	78.240

Source: IPOT

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#### INVESTMENT RATINGS

BUY : Expected total return of 10% or more within a 12-month period  
HOLD : Expected total return between -10% and 10% within a 12-month period  
SELL : Expected total return of -10% or worse within a 12-month period

#### ANALYSTS CERTIFICATION.

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