

# Evening Update

## Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan bergerak bervariasi dan berhasil ditutup di teritori positif. Aksi *net buy* investor asing terhadap sejumlah saham perbankan serta naiknya harga emas menjadi katalis positif di pasar. Disisi lain, kekhawatiran investor terkait kesepakatan dagang AS dan China setelah adanya laporan bahwa para pejabat China menyatakan pesimis terhadap prospek kesepakatan dagang antara kedua negara menjadi sentimen negatif bagi indeks. IHSG ditutup menguat tipis +29 poin (+0,48%) pada level 6.152. Sektor industri dasar dan keuangan yang masing-masing bertambah +11 poin (+1,25%) dan +12 poin (+1,01%) menjadi sektor yang menopang pergerakan indeks hari ini. Sementara itu nilai tukar rupiah terhadap dolar Amerika diperdagangkan melemah tipis -12 poin (-0,09%) pada level Rp14.090. Investor asing membukukan pembelian bersih (*foreign net buy*) sebesar Rp191,2 miliar di pasar reguler.

| Items                       | Avg 2019 | Terakhir | H-1     |
|-----------------------------|----------|----------|---------|
| Nilai transaksi (Rp miliar) | 5.296,5  | 4.707,9  | 4.658   |
| Volume transaksi (jt shm)   | 4.957,8  | 4.524,4  | 4.482,2 |
| Netas ing (Rp miliar)       | 65,7     | -429,9   | 64,9    |
| Netas ing (jt shm)          | -150,6   | 49,5     | 94,0    |
| Kapitalisasi pasar (Rp trn) | 5.376,3  | 6.826,0  | 6.832,4 |

| Index          | Penutupan | 1 year return | 1 day return | YTD return |
|----------------|-----------|---------------|--------------|------------|
| Agf            | 13,89     | -3,8%         | 0,2%         | -11,2%     |
| Basic Industry | 9,54      | 20,7%         | 0,0%         | 11,7%      |
| Consumer       | 2,061     | -11,9%        | -0,3%        | -10,8%     |
| Finance        | 12,66     | 10,5%         | 0,2%         | 7,7%       |
| Infrastructure | 1,129     | -4,8%         | -1,1%        | 6,1%       |
| Misc. Industry | 1,177     | -8,7%         | -0,1%        | -5,5%      |
| Mining         | 150,1     | -8,6%         | 1,5%         | -5,5%      |
| Property       | 5,08      | 10,9%         | 0,0%         | 10,4%      |
| Trade          | 7,83      | -3,0%         | -0,5%        | -0,1%      |

| Index  | Negara    | Penutupan | 1 year return | 1 day return | YTD return |
|--------|-----------|-----------|---------------|--------------|------------|
| JCI    | Indonesia | 6,123     | 2,0%          | -0,1%        | -1,2%      |
| FSSTI  | Singapura | 3,259     | 6,3%          | 0,6%         | 6,2%       |
| KLCI   | Malaysia  | 16,04     | -6,2%         | 0,6%         | -5,1%      |
| SET    | Thailand  | 16,08     | -1,7%         | 0,4%         | 2,8%       |
| KOSPI  | Korea     | 2,161     | 2,9%          | -0,1%        | 4,8%       |
| SENSEX | India     | 40,284    | 12,6%         | -0,2%        | 11,7%      |
| HSI    | Hongkong  | 26,681    | 1,2%          | 1,3%         | 3,2%       |
| NKY    | Jepang    | 23,417    | 7,3%          | 0,5%         | 16,6%      |
| AS30   | Australia | 6,872     | 18,8%         | -0,4%        | 20,3%      |
| IBOV   | Brazil    | 106,269   | 20,9%         | -0,3%        | 20,9%      |
| DJI    | Amerika   | 28,036    | 12,1%         | 0,1%         | 20,2%      |
| SX5P   | Eropa     | 3,340     | 15,2%         | 0,1%         | 21,0%      |
| UKX    | Inggris   | 7,308     | 4,4%          | 0,1%         | 8,8%       |

| Dual Listing (US\$) | Closing US\$ | IDR     | Daily % chg |
|---------------------|--------------|---------|-------------|
| TLKM                | 28,51        | 2.006,7 | -0,62       |
| TINS                | 0,44         | 623,4   | 0,00        |
| ANTM                | 0,46         | 654,6   | 0,00        |
| *Rp US\$            | 14,077       |         | -2,33%      |

| Items                      | Latest Interest | Inflation | Real interest rate |
|----------------------------|-----------------|-----------|--------------------|
| Deposito IDR 3 bln         | 5,91            |           |                    |
| Kredit Bank IDR            | 9,00            |           |                    |
| B17-Days R.R               | 5,00%           | 3,19%     | 0,02               |
| Fed Funds Target           | 1,75            | 180%      | 173                |
| ECB Main Refinancing       | -               | 0,70%     | (0,01)             |
| Domestic Yen Interest Call | (0,06)          | 0,20%     | (0,08)             |

| Item US\$         | Penutupan | Ret 1 year (%) | +/-    | Ret 1 day (%) |
|-------------------|-----------|----------------|--------|---------------|
| (in USD)          |           |                |        |               |
| Minyak WTI/bbl    | 57,1      | 0,5%           | -0,7   | -1,6%         |
| CPO/ton           | 62,41     | 31,7%          | -2,4   | -0,38%        |
| Karet/kg          | 1,64      | -22,2%         | 0,0    | -1,0%         |
| Nikel/ton         | 11,818    | 31,3%          | -119,0 | -1,00%        |
| Timah/ton         | 6,034     | -1,2%          | -39,5  | -0,25%        |
| Emas/lot          | 147,15    | 20,2%          | 3,2    | 0,21%         |
| Batu bara/ton     | 6,75      | -3,1%          | 0,3    | 0,52%         |
| Tepung Terigu/ton | 11,65     | -7,0%          | 8,1    | 5,84%         |
| Jagung gubus/ton  | 3,6       | 5,9%           | 0,0    | -0,58%        |
| Kedelai           | 8,9       | 6,7%           | -0,1   | -0,86%        |
| Tembaga           | 5,815,0   | -6,6%          | -10,5  | -0,8%         |

Sumber: Bloomberg

| Top Gainer |           |           | Top Loser |           |           |
|------------|-----------|-----------|-----------|-----------|-----------|
| Ticker     | Last (Rp) | Change(+) | Ticker    | Last (Rp) | Change(-) |
| MREI       | 4.700     | 700       | BYAN      | 15.100    | 700       |
| UNVR       | 42.800    | 650       | SFAN-W    | 15        | 485       |
| UNTR       | 22.450    | 550       | POLU      | 1.500     | 395       |
| GGRM       | 53.650    | 500       | ENVY      | 1.170     | 385       |
| TCID       | 11.900    | 400       | POLI      | 1.370     | 300       |

Source: IPOT

| Top Foreign Buy |           |         | Top Foreign Sell |           |         |
|-----------------|-----------|---------|------------------|-----------|---------|
| Ticker          | NBVal (B) | NBLot   | Ticker           | NSVal (B) | NSLot   |
| BBCA            | 134       | 42.496  | TLKM             | 98        | 247.073 |
| BBRI            | 126       | 303.641 | ACES             | 20        | 123.702 |
| BMRI            | 50        | 71.561  | BBNI             | 19        | 25.844  |
| ICBP            | 40        | 35.762  | SMGR             | 17        | 14.133  |
| UNTR            | 13        | 6.157   | AKRA             | 14        | 38.402  |

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

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