

Evening Update

29 May 2020

| Items | Avg 2016 | Terakhir | H-1 |
|-----------------------------|----------|----------|---------|
| Nilai transaksi (Rp miliar) | 5,296.5 | 6,867.3 | 6,089.7 |
| Volume transaksi (jt shm) | 4,957.8 | 10,409.8 | 6,551.9 |
| Net asing (Rp miliar) | 65.7 | 436.9 | -274.3 |
| Net asing (jt shm) | -150.6 | -203.9 | -314.0 |
| Kapitalisasi pasar (Rp tn) | 5,376.3 | 5,258.0 | 5,174.8 |

| Sektoral | | | | |
|----------------|-----------|---------------|--------------|------------|
| Index | Penutupan | 1 year return | 1 day return | YTD return |
| Agri | 972 | -29.8% | 0.9% | -36.3% |
| Basic Industry | 725 | -3.0% | 2.0% | -25.9% |
| Consumer | 1,818 | -24.3% | -0.3% | -11.4% |
| Finance | 949 | -22.7% | 3.9% | -29.9% |
| Infrastructure | 861 | -24.0% | -1.3% | -24.3% |
| Misc. Industry | 829 | -34.1% | 3.1% | -32.2% |
| Mining | 1,243 | -24.2% | -0.3% | -19.7% |
| Property | 328 | -27.8% | 2.4% | -35.0% |
| Trade | 604 | -23.9% | 0.8% | -21.6% |

| Indeks Saham | | | | | |
|--------------|-----------|-----------|---------------|--------------|------------|
| Index | Negara | Penutupan | 1 year return | 1 day return | YTD return |
| JCI | Indonesia | 4,716 | -22.7% | 1.6% | -25.1% |
| FSSTI | Singapura | 2,515 | -20.5% | -0.2% | -22.0% |
| KLCI | Malaysia | 1,458 | -10.2% | 0.4% | -8.3% |
| SET | Thailand | 1,338 | -17.4% | -0.6% | -15.3% |
| KOSPI | Korsel | 2,029 | 0.3% | -0.1% | -8.2% |
| SENSEX | India | 32,201 | -18.5% | 1.9% | -21.9% |
| HSI | Hongkong | 23,133 | -15.1% | -0.7% | -17.9% |
| NKY | Jepang | 21,916 | 4.3% | 2.3% | -7.7% |
| AS30 | Australia | 5,958 | -8.9% | 1.2% | -13.7% |
| IBOV | Brasil | 86,949 | -10.0% | -1.1% | -24.8% |
| DJI | Amerika | 25,401 | 1.1% | -0.6% | -11.0% |
| SX5P | Eropa | 2,936 | -4.0% | 1.6% | -13.7% |
| UKX | Inggris | 6,219 | -13.5% | 1.2% | -17.5% |

| Dual Listing (US\$) | | | | |
|---------------------|--------------|---------|-------|-------------|
| | Closing US\$ | IDR | +/- | Daily % chg |
| TLKM | 21.08 | 1,550.4 | -0.23 | -1.08% |
| TINS | 0.021 | 309.6 | 0.00 | 0.00% |
| *Rp/US\$ | 14,710 | | | |

| Suku Bunga & Inflasi | | | |
|-----------------------|-----------------|-----------|--------------------|
| Items | Latest Interest | Inflation | Real interest rate |
| Deposito IDR 3 bln | 5.55% | | |
| Kredit Bank IDR | 12.40% | | |
| BI 7-Days RR | 4.50% | 2.67% | 1.83% |
| Fed Funds Target | 0.25% | 0.30% | -0.05% |
| ECB Main Refinancing | 0.00% | 0.30% | -0.30% |
| Domestic Yen Interest | -0.06% | 0.10% | -0.16% |

| Harga Komoditas | | | | |
|--------------------|-----------|----------------|-------|---------------|
| dim US\$ | Penutupan | Ret 1 year (%) | +/- | Ret 1 day (%) |
| (in USD) | | | | |
| Minyak WTI / bbl | 33.7 | -42.7% | 0.9 | 2.74% |
| CPO/ ton | 521.2 | 9.8% | -3.0 | -0.57% |
| Nikel/ ton | 12,179 | 0.7% | 132.8 | 1.10% |
| Timah/ ton | 15,638 | -19.6% | 148.9 | 0.96% |
| Emas/tr. oz | 1,718.3 | 34.3% | 8.9 | 0.52% |
| Batu Bara/ ton | 52.3 | -37.3% | -0.3 | -0.48% |
| Tepung Terigu/ ton | 146.5 | -7.0% | 8.1 | 5.84% |
| Jagung/bushel | 3.1 | -22.0% | 0.1 | 1.99% |
| Kedelai | 8.3 | 2.5% | 0.0 | -0.18% |
| Tembaga | 5,305.5 | -10.7% | 78.8 | 1.51% |

Sumber: Bloomberg

Indonesia Market Wrap

Indeks harga saham gabungan mengawali perdagangan di teritori negatif namun tidak bertahan lama untuk kemudian berbalik arah ke zona hijau. Optimisme investor yang didorong oleh rencana pemerintah untuk menerapkan *new normal* sehingga perekonomian bisa berangsur-angsur pulih menjadi sentimen positif utama yang mempengaruhi pergerakan indeks. Sementara itu memanasnya hubungan antara Amerika dan China sempat menjadi sentimen negatif di pasar. IHSG membukukan penguatan +37 poin (+0.79%) pada level 4,754. Sektor aneka industri dan industri dasar yang masing-masing membukukan kenaikan +29 poin (+3.49%) dan +21 poin (+2.89%) menjadi kontributor terbesar bagi penguatan indeks harga saham gabungan hari ini. Nilai tukar rupiah terhadap dolar Amerika diperdagangkan melemah menguat +105 poin (+0.71%) ditutup pada level Rp14,610. Investor asing membukukan pembelian bersih (*foreign net buy*) sebesar Rp82.8 miliar di pasar reguler.

| Top Gainer | | | Top Loser | | |
|------------|-----------|-----------|-----------|-----------|-----------|
| Ticker | Last (Rp) | Change(+) | Ticker | Last (Rp) | Change(-) |
| GGRM | 48,750 | 825 | DSSA | 19,525 | 1,450 |
| UNTR | 15,700 | 600 | POLL | 7,825 | 575 |
| CPIN | 5,775 | 575 | BBCA | 25,950 | 525 |
| EMTK | 4,990 | 340 | TKIM | 3,970 | 290 |
| ASII | 4,770 | 230 | UNVR | 7,750 | 275 |

Source: IPOT

| Top Foreign Buy | | | Top Foreign Sell | | |
|-----------------|-----------|-----------|------------------|-----------|-----------|
| Ticker | NBVal (B) | NBLot | Ticker | NSVal (B) | NSLot |
| BBRI | 1,285 | 4,500,000 | PTBA | 357 | 1,800,000 |
| ASII | 153 | 325,708 | JSMR | 276 | 768,648 |
| BMRI | 144 | 325,847 | PWON | 233 | 6,400,000 |
| SMGR | 47 | 48,445 | TKIM | 191 | 474,354 |
| BTSP | 41 | 146,531 | BSDE | 157 | 2,400,000 |

Source: IPOT

Head Office

PT INDO PREMIER SEKURITAS

Pacific Century Place 16th Floor SCBD Lot 10

Jl. Jend. Sudirman Kav. 52-53

Jakarta Selatan 12190 - Indonesia

p +62.21.5088.7200

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.

The views expressed in this research report accurately reflect the analyst's personal views about any and all of the subject securities or issuers; and no part of the research analyst's compensation was, is, or will be, directly or indirectly, related to the specific recommendations or views expressed in the report.

DISCLAIMERS

This research is based on information obtained from sources believed to be reliable, but we do not make any representation or warranty nor accept any responsibility or liability as to its accuracy, completeness or correctness. Opinions expressed are subject to change without notice. This document is prepared for general circulation. Any recommendations contained in this document does not have regard to the specific investment objectives, financial situation and the particular needs of any specific addressee. This document is not and should not be construed as an offer or a solicitation of an offer to purchase or subscribe or sell any securities. PT. Indo Premier Sekuritas or its affiliates may seek or will seek investment banking or other business relationships with the companies in this report.