

Evening Update

28 September 2020

Items	Avg 2016	Terakhir	H-1
Nilai transaksi (Rp miliar)	5,296.5	8,844.8	6,559.6
Volume transaksi (jt shm)	4,957.8	6,435.5	5,149.1
Net asing (Rp miliar)	65.7	-829.6	-498.4
Net asing (jt shm)	-150.6	-1,568.3	16.6
Kapitalisasi pasar (Rp tn)	5,376.3	5,514.0	5,399.1

Sektoral				
Index	Penutupan	1 year return	1 day return	YTD return
Aqri	1,138	-16.1%	2.1%	-25.4%
Basic Industry	706	-17.2%	2.1%	-27.8%
Consumer	1,841	-16.9%	1.9%	-10.3%
Finance	1,072	-14.6%	3.0%	-20.8%
Infrastructure	804	-34.7%	0.6%	-29.4%
Misc. Industry	872	-25.9%	4.4%	-28.8%
Mining	1,330	-17.5%	1.6%	-14.1%
Property	342	-31.3%	1.2%	-32.1%
Trade	623	-21.7%	0.7%	-19.0%

Indeks Saham					
Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	4,946	-20.2%	2.1%	-21.5%
FSSTI	Singapura	2,472	-20.9%	0.9%	-23.3%
KLCI	Malaysia	1,509	-4.7%	0.6%	-5.0%
SET	Thailand	1,245	-24.3%	-0.2%	-21.2%
KOSPI	Korsel	2,279	11.2%	0.3%	4.3%
SENSEX	India	37,389	-3.7%	2.3%	-9.4%
HSI	Hongkong	23,235	-10.5%	-0.3%	-17.6%
NKY	Jepang	23,205	6.1%	0.5%	-1.3%
AS50	Australia	6,141	-10.0%	1.4%	-9.9%
IBOV	Brasil	96,999	-7.7%	0.0%	-16.1%
DJI	Amerika	27,174	1.3%	1.3%	-4.8%
SXSP	Eropa	2,882	-11.1%	-0.2%	-15.3%
UKX	Inggri	5,843	-21.3%	0.3%	-22.5%

Dual Listing (US\$)				
	Closing US\$	IDR	+/-	Daily % chg
TLKM	18.33	1,364.7	0.10	0.55%
TINS	0.033	493.1	0.00	-10.94%
*Rp/US\$	14,890			

Suku Bunga & Inflasi			
Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	5.08%		
Kredit Bank IDR	12.37%		
BI 7-Days RR	4.00%	1.32%	2.68%
Fed Funds Target	0.25%	1.30%	-1.05%
ECB Main Refinancing	0.00%	-0.20%	0.20%
Domestic Yen Interest Call	-0.03%	0.20%	-0.23%

Harga Komoditas				
dlim US\$	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
(in USD)				
Minyak WTI / bbl	40.3	-28.0%	-0.1	-0.15%
CPO/ ton	677.0	31.4%	15.6	2.36%
Nikel/ ton	14,220	-18.6%	1.0	0.01%
Timah/ ton	17,150	3.8%	-91.0	-0.53%
Emas/tr. oz	1,861.6	24.4%	-6.5	-0.35%
Batu Bara/ ton	58.8	-10.1%	-1.0	-1.67%
Tepung Terigu/ ton	146.5	-7.0%	8.1	5.84%
Jagung/bushel	3.1	-9.1%	0.0	0.00%
Kedelai	10.0	15.7%	0.0	0.25%
Tembaga	6,543.6	13.7%	16.3	0.25%

Sumber: Bloomberg

Indonesia Market Wrap

Indeks harga saham gabungan mengawali perdagangan di zona hijau seiring dengan menguatnya indeks bursa global dan naiknya harga beberapa komoditas, namun tidak bertahan lama untuk kemudian berbalik arah ke zona merah. Aksi jual investor asing pada saham sektor perbankan dan aksi ambil untung investor terhadap saham yang kemarin membukukan kenaikan signifikan menjadi katalis negatif yang mendorong pelemahan indeks harga saham gabungan hari ini.

IHSG ditutup melemah -39 poin (-0.79%) pada level **4,906**. Sektor aneka industri dan keuangan yang masing-masing membukukan penurunan -17 poin (-1.97%) dan -17 poin (-1.58%) menjadi kontributor terbesar bagi pelemahan indeks harga saham gabungan hari ini. Sementara itu investor asing masih membukukan penjualan bersih (*foreign net sell*) sebesar 673.7 miliar di pasar reguler.

Nilai tukar rupiah terhadap dolar Amerika diperdagangkan melemah -27 poin (-0.18%) ditutup pada level **Rp14,900**

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
MREI	4,500	500	SOHO	10,225	750
CITA	2,340	340	DSSA	15,725	750
SMGR	9,125	325	UNTR	22,575	625
TCPI	5,400	225	GGRM	40,100	600
KAEF	3,060	180	MKPI	19,500	500

Top Foreign Buy			Top Foreign Sell		
Ticker	NBVal (B)	NBLot	Ticker	NSVal (B)	NSLot
MDKA	28	178,031	BBCA	163	58,709
TOWR	24	228,905	BMRI	131	250,377
BULL	23	795,194	BBRI	123	394,001
JSMR	13	36,150	TLKM	93	346,691
BTPS	4	11,476	TBIG	27	203,260

Source: IPOT

Evening Update

28 September 2020

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

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