

# Evening Update

1 October 2020

Items	Avg 2016	Terakhir	H-1
Nilai transaksi (Rp miliar)	5,296.5	8,483.9	8,593.9
Volume transaksi (jt shm)	4,957.8	5,973.4	5,768.9
Net asing (Rp miliar)	65.7	-481.8	-341.9
Net asing (jt shm)	-150.6	191.7	-34.6
Kapitalisasi pasar (Rp tn)	5,376.3	5,429.5	5,439.6

Sektoral				
Index	Penutupan	1 year return	1 day return	YTD return
Agri	1,137	-17.2%	1.3%	-25.4%
Basic Industry	710	-16.4%	1.9%	-27.5%
Consumer	1,829	-16.8%	0.4%	-10.9%
Finance	1,040	-16.0%	-0.9%	-23.2%
Infrastructure	786	-35.2%	-1.3%	-30.9%
Misc. Industry	820	-29.6%	-1.7%	-33.0%
Mininq	1,332	-15.9%	-0.6%	-14.0%
Property	341	-31.4%	-0.4%	-32.4%
Trade	631	-21.0%	1.3%	-18.0%

Indeks Saham					
Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	4,870	-20.7%	-0.2%	-22.7%
FSSTI	Singapura	2,467	-21.6%	-0.2%	-23.5%
KLCI	Malaysia	1,505	-5.3%	0.1%	-5.3%
SET	Thailand	1,237	-23.8%	-1.6%	-21.7%
KOSPI	Korsel	2,308	11.9%	1.3%	5.9%
SENSEX	India	38,068	-0.6%	0.2%	-7.7%
HSI	Hongkong	23,459	-10.1%	0.8%	-16.8%
NKY	Jepang	23,539	7.6%	0.1%	-2.0%
AS30	Australia	6,142	-10.4%	0.1%	-11.7%
IBOV	Brasil	94,603	-9.1%	1.1%	-18.2%
DJI	Amerika	27,782	4.5%	1.2%	-2.7%
SX5P	Eropa	2,904	-9.5%	-0.5%	-14.7%
UKX	Inqris	5,866	-20.3%	-0.5%	-22.2%

Dual Listing (US\$)				
	Closing US\$	IDR	+/-	Daily % chg
TLKM	17.37	1,293.6	-0.42	-2.36%
TINS	0.033	497.7	0.00	0.00%
*Rp/US\$	14,895			

Suku Bunga & Inflasi			
Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	5.14%		
Kredit Bank IDR	12.21%		
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	-0.06%	0.20%	-0.26%

Harga Komoditas				
dlim US\$	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
(in USD)				
Minyak WTI / bbl	40.2	-25.0%	0.9	2.37%
CPO/ ton	650.8	27.1%	-15.1	-2.27%
Nikel/ ton	14,480	-15.9%	64.5	0.45%
Timah/ ton	17,449	9.7%	38.8	0.22%
Emas/tr. oz	1,885.8	27.5%	-12.3	-0.65%
Batu Bara/ ton	58.6	-16.3%	0.0	-0.09%
Tepung Terigu/ ton	146.5	-7.0%	8.1	5.84%
Jagung/bushel	3.5	-11.6%	0.1	4.18%
Kedelai	10.2	15.9%	0.3	3.08%
Tembaqa	6,668.0	17.1%	94.0	1.43%

Sumber: Bloomberg

## Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan konsisten bergerak di zona hijau dan akhirnya ditutup menguat signifikan. Optimisme investor terhadap prospek stimulus fiskal lanjutan di Amerika, meredanya aksi jual investor asing di saham berkapitalisasi besar terutama sektor perbankan dan diluncurkannya stimulus baru oleh pemerintah yaitu subsidi bunga untuk KPR dan kredit kendaraan bermotor dengan syarat tertentu dalam rangka program pemulihan ekonomi menjadai sentimen positif utama yang mendorong penguatan indeks harga saham gabungan.

**IHSG ditutup menguat signifikan +100 poin (+2.05%)** pada level **4,970**. Sektor aneka infrastruktur dan aneka industri yang masing-masing mencatatkan kenaikan +39 poin (+4.97%) dan +23 poin (+2.80%) menjadi kontributor terbesar bagi penguatan indeks harga saham gabungan hari ini. Sementara itu investor asing membukukan penjualan bersih (*foreign net sell*) sebesar 65.4 miliar di pasar reguler.

**Nilai tukar rupiah** terhadap dolar Amerika diperdagangkan menguat +45 poin (+0.30%) ditutup pada level **Rp14,835**

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
BBCA	27,850	750	SOHO	8,275	600
AALI	10,675	500	SCCO	10,000	200
SMGR	9,575	400	DNET	3,340	150
GGRM	40,450	400	MLBI	8,450	150
INTP	10,775	375	HEXA	3,010	110

Top Foreign Buy			Top Foreign Sell		
Ticker	NBVal (B)	NBLot	Ticker	NSVal (B)	NSLot
TLKM	131	484,845	ASII	28	60,873
BBRI	52	166,007	PGAS	15	152,432
BMRI	37	71,294	ERAA	14	91,640
BULL	24	786,129	UNTR	11	4,881
BBCA	16	6,665	ICBP	9	9,230

Source: IPOT

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1 October 2020

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