

# Evening Update

18 January 2021

| Items                       | Avg 2016 | Terakhir | H-1      |
|-----------------------------|----------|----------|----------|
| Nilai transaksi (Rp miliar) | 5.296,5  | 26.242,8 | 34.469,8 |
| Volume transaksi (lt shm)   | 4.957,8  | 21.333,5 | 25.373,8 |
| Kapitalisasi pasar (Ro tn)  | 5.376,3  | 7.105,6  | 7.166,9  |

  

| Sektoral       |           |               |              |            |
|----------------|-----------|---------------|--------------|------------|
| Index          | Penutupan | 1 year return | 1 day return | YTD return |
| Aqri           | 1.508     | 5.0%          | -1.4%        | 0.7%       |
| Basic Industry | 1.005     | 4.0%          | -0.8%        | 9.1%       |
| Consumer       | 1.836     | -12.5%        | -0.6%        | 0.2%       |
| Finance        | 1.439     | 4.8%          | -1.4%        | 8.0%       |
| Infrastructure | 1.057     | -3.6%         | -0.2%        | 5.6%       |
| Misc. Industry | 1.157     | -6.2%         | -2.4%        | 7.1%       |
| Mininq         | 2.209     | 43.2%         | -0.3%        | 15.3%      |
| Property       | 415       | -14.6%        | 1.0%         | 4.5%       |
| Trade          | 813       | 7.6%          | -0.5%        | 6.1%       |

  

| Indeks Saham |           |           |               |              |            |
|--------------|-----------|-----------|---------------|--------------|------------|
| Index        | Negara    | Penutupan | 1 year return | 1 day return | YTD return |
| JCI          | Indonesia | 6,373     | 1.3%          | -0.9%        | 6.6%       |
| FSSTI        | Singapura | 2,998     | -8.6%         | -0.2%        | 5.4%       |
| KLCI         | Malaysia  | 1,615     | 1.2%          | -0.7%        | -0.7%      |
| SET          | Thailand  | 1,519     | -5.1%         | -1.1%        | 4.8%       |
| KOSPI        | Korsel    | 3,086     | 37.1%         | -2.0%        | 6.4%       |
| SENSEX       | India     | 49,035    | 16.9%         | -1.1%        | 2.7%       |
| HSI          | Honokona  | 28,574    | -1.7%         | 0.3%         | 4.9%       |
| NKY          | Jepang    | 28,519    | 18.6%         | -0.6%        | 3.2%       |
| AS30         | Australia | 6,987     | -2.7%         | 0.1%         | 1.3%       |
| IBOV         | Brasil    | 120,349   | 1.6%          | -2.5%        | 1.1%       |
| DJI          | Amerika   | 30,814    | 5.0%          | -0.6%        | 0.7%       |
| XKSP         | Eropa     | 3,186     | -8.4%         | -0.7%        | 2.5%       |
| UKX          | Inqaris   | 6,736     | -12.2%        | -1.0%        | 4.3%       |

  

| Dual Listing (US\$) |              |         |       |             |
|---------------------|--------------|---------|-------|-------------|
|                     | Closing US\$ | IDR     | +/-   | Daily % cha |
| TLKM                | 24.91        | 1,751.0 | -0.25 | -0.99%      |
| TINS                | 0.153        | 2,156.0 | 0.00  | -2.31%      |
| *Ro/US\$            | 14.059       |         |       |             |

  

| Suku Bunga & Inflasi       |                 |           |                    |
|----------------------------|-----------------|-----------|--------------------|
| Items                      | Latest Interest | Inflation | Real interest rate |
| Deposito IDR 3 bln         | 4.54%           |           |                    |
| Kredit Bank IDR            | 12.26%          |           |                    |
| BI 7-Days RR               | 3.75%           | 1.68%     | 2.07%              |
| Fed Funds Tarqet           | 0.25%           | 1.40%     | -1.15%             |
| ECB Main Refinancing       | 0.00%           | -0.30%    | 0.30%              |
| Domestic Yen Interest Call | -0.02%          | -0.90%    | 0.89%              |

  

| Harga Komoditas    |           |                |        |               |
|--------------------|-----------|----------------|--------|---------------|
| dllm US\$          | Penutupan | Ret 1 year (%) | +/-    | Ret 1 day (%) |
| (in USD)           |           |                |        |               |
| Minvak WTI / bbl   | 52.4      | -10.6%         | -1.2   | -2.26%        |
| CPO/ ton           | 820.9     | 12.8%          | -24.0  | -2.84%        |
| Nikel/ ton         | 17,971    | 26.2%          | -273.0 | -1.50%        |
| Timah/ ton         | 21,500    | 23.5%          | 198.0  | 0.93%         |
| Emas/tr. oz        | 1,828.4   | 17.4%          | -18.1  | -0.98%        |
| Batu Bara/ ton     | 87.4      | 24.0%          | 0.2    | 0.17%         |
| Teouna Tefiou/ ton | 146.5     | -7.0%          | 8.1    | 5.84%         |
| Jacuna/bushel      | 5.2       | 36.4%          | 0.0    | -0.39%        |
| Kedelai            | 14.2      | 54.4%          | -0.1   | -0.96%        |
| Tembaga            | 7,937.4   | 26.9%          | -102.1 | -1.27%        |

Sumber : Bloomberg

## Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan bergerak bervariasi dan akhirnya di tutup menguat. Diperpanjangnya dana bansos berupa BLT oleh kemenkeu sampai akhir 2021 yang membawa angin segar ke sektor konsumen dan rilis PDB kuartal IV dan tahunan Tiongkok pada 2020 yang tercatat masing masing 6,2% dan 2,3% (konsensus 6,1% dan 2,1%) memberi harapan percepatan pemulihan ekonomi Indonesia mengingat Tiongkok merupakan mitra dagang Indonesia menjadi sentimen positif di pasar. Sementara itu berlanjutnya penurunan harga beberapa komoditas dan terkoreksinya indeks bursa global sempat menjadi sentimen negatif yang menekan pergerakan indeks.

**IHSG ditutup menguat +16 poin (+0.26%)** pada level **6,390**. Sektor konsumen dan aneka industri masing-masing mengalami kenaikan +41 poin (+2.22%) dan +11 poin (+0.95%) menjadi kontributor terbesar bagi penguatan indeks harga saham gabungan hari ini. Sementara itu investor asing membukukan penjualan bersih (*foreign net sell*) sebesar 230.3 miliar di pasar reguler.

**Nilai tukar rupiah terhadap dolar Amerika melemah -50 poin (-0.36%)** pada level **Rp14,070**.

| Top Gainer |           |           | Top Loser |           |           |
|------------|-----------|-----------|-----------|-----------|-----------|
| Ticker     | Last (Rp) | Change(+) | Ticker    | Last (Rp) | Change(-) |
| BBCA       | 35.600    | 825       | INKP      | 12.500    | 925       |
| INTP       | 15.650    | 800       | TKIM      | 12.700    | 900       |
| SMGR       | 12.650    | 700       | MEGA      | 11.325    | 850       |
| DCII       | 3.070     | 610       | BPII      | 8.750     | 550       |
| UNVR       | 7.500     | 550       | SOHO      | 6.750     | 500       |

| Top Foreign Buy |           |         | Top Foreign Sell |           |           |
|-----------------|-----------|---------|------------------|-----------|-----------|
| Ticker          | NBVal (B) | NBLot   | Ticker           | NSVal (B) | NSLot     |
| BBRI            | 113       | 245.161 | SMGR             | 102       | 80.470    |
| KLBF            | 78        | 467.917 | BUMI             | 85        | 6.045.153 |
| BBCA            | 61        | 17.069  | INKP             | 57        | 43.956    |
| BMRI            | 50        | 72.028  | WIKA             | 48        | 200.001   |
| ASII            | 41        | 62.440  | INCO             | 47        | 74.313    |

Source : IPOT

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