

# Evening Update

26 February 2021

| Items                       | Avg 2016 | Terakhir | H-1      |
|-----------------------------|----------|----------|----------|
| Nilai transaksi (Rp miliar) | 5,296.5  | 23,747.5 | 15,221.5 |
| Volume transaksi (jt shm)   | 4,957.8  | 13,783.0 | 13,413.7 |
| Net asing (Rp miliar)       | 65.7     | 61.3     | 303.0    |
| Net asing (jt shm)          | -150.6   | -1,558.3 | -103.5   |
| Kapitalisasi pasar (Rp trn) | 5,376.3  | 7,012.3  | 6,969.2  |

| Index          | Penutupan | 1 year return | 1 day return | YTD return |
|----------------|-----------|---------------|--------------|------------|
| Agri           | 1,450     | 17.8%         | 0.1%         | -3.2%      |
| Basic Industry | 962       | 21.5%         | 0.9%         | 4.4%       |
| Consumer       | 1,705     | -7.5%         | -0.1%        | -6.9%      |
| Finance        | 1,469     | 12.6%         | 0.7%         | 10.2%      |
| Infrastructure | 1,071     | 8.6%          | 1.0%         | -7.0%      |
| Misc. Industry | 1,022     | -4.3%         | -0.4%        | -5.5%      |
| Mining         | 2,075     | 47.9%         | 1.0%         | 8.3%       |
| Property       | 383       | -12.7%        | 0.4%         | -3.4%      |
| Trade          | 872       | 27.8%         | 0.9%         | 13.8%      |

| Index  | Negara    | Penutupan | 1 year return | 1 day return | YTD return |
|--------|-----------|-----------|---------------|--------------|------------|
| JCI    | Indonesia | 6,290     | 10.6%         | 0.6%         | 5.2%       |
| FSSTI  | Singapura | 2,974     | -4.6%         | 1.7%         | 4.6%       |
| KLCI   | Malaysia  | 1,582     | 5.8%          | 1.5%         | -2.8%      |
| SET    | Thailand  | 1,497     | 9.5%          | 0.4%         | 3.3%       |
| KOSPI  | Korsel    | 2,995     | 44.2%         | -2.4%        | 7.9%       |
| SENSEX | India     | 51,039    | 28.0%         | 0.5%         | 6.9%       |
| HSI    | Hongkong  | 30,074    | 12.7%         | 1.2%         | 10.4%      |
| NIKY   | Jepang    | 29,672    | 32.3%         | -1.6%        | 9.9%       |
| AS30   | Australia | 7,106     | 4.6%          | 0.8%         | 2.1%       |
| IBOV   | Brasil    | 112,256   | -1.3%         | -2.9%        | -5.7%      |
| DJI    | Amerika   | 31,402    | 16.0%         | -1.8%        | 2.6%       |
| SXSP   | Europa    | 3,173     | -4.0%         | -0.6%        | 2.1%       |
| UKX    | Inggris   | 6,652     | -5.5%         | -0.1%        | 3.0%       |

| Dual Listing (US\$) | Closing US\$ | IDR     | +/-   | Daily % chg |
|---------------------|--------------|---------|-------|-------------|
| TLKM                | 24.12        | 1,698.7 | -0.61 | -2.47%      |
| TINS                | 0.175        | 2,470.0 | 0.00  | 0.70%       |
| *Rp/US\$            | 14,085       |         |       |             |

| Items                      | Interest | Latest Inflation | Real interest rate |
|----------------------------|----------|------------------|--------------------|
| Deposito IDR 3 bln         | 4.36%    |                  |                    |
| Kredit Bank IDR            | 11.85%   |                  |                    |
| BI 7-Days RR               | 3.50%    | 1.55%            | 1.95%              |
| Fed Funds Target           | 0.25%    | 1.40%            | -1.15%             |
| ECB Main Refinancing       | 0.00%    | 0.90%            | -0.90%             |
| Domestic Yen Interest Call | -0.02%   | -0.60%           | 0.58%              |

| Harga Komoditas         | Penutupan | Ret 1 year (%) | +/-   | Ret 1 day (%) |
|-------------------------|-----------|----------------|-------|---------------|
| Minyak WTI US\$/ bbl    | 63.3      | 29.9%          | -0.2  | -0.35%        |
| CPO RM/ ton             | 4,034.0   | 62.7%          | 107.0 | 2.72%         |
| Nikel US\$/ ton         | 19,661    | 59.3%          | 352.0 | 0.00%         |
| Timah US\$/ ton         | 28,940    | 75.0%          | 670.0 | 0.00%         |
| Emas US\$/tr. oz        | 1,772.2   | 8.0%           | 1.7   | 0.10%         |
| Batu Bara US\$/ ton     | 85.5      | 25.9%          | 0.0   | 0.00%         |
| Tepung Terigu US\$/ ton | 146.5     | -7.0%          | 8.1   | 5.84%         |
| Jagung US\$/bushel      | 5.4       | 48.4%          | 0.0   | -0.74%        |
| Kedelai US\$/bushel     | 14.1      | 61.8%          | -0.2  | -1.24%        |
| Tembaga US\$/ton        | 9,340.0   | 64.9%          | 108.5 | 1.18%         |

Sumber : Bloomberg

## Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham bergerak bervariasi dan akhirnya ditutup melemah. Terkoreksi dalamnya indeks di bursa Wall Street seiring melonjaknya yield obligasi pemerintah dengan tenor 10 tahun dan melemahnya nilai tukar rupiah terhadap dolar Amerika menjadi sentimen negatif di pasar. Sementara itu masuknya investor pada saham – saham defensif menjadi katalis positif yang sempat membawa indeks ke zona hijau dan menahan indeks dari koreksi yang lebih dalam.

**IHSG ditutup melemah -48 poin (-0.76%)** pada level **6,242**. Sektor aneka industri dan properti yang masing-masing terkoreksi -25 poin (-2.46%) dan -5 poin (-1.38%) menjadi kontributor terbesar bagi pelemahan indeks harga saham gabungan hari ini. Sementara itu investor asing membukukan penjualan bersih (*foreign net sell*) sebesar 51.7 miliar di pasar reguler.

**Nilai tukar rupiah terhadap dolar Amerika melemah -152 poin (-1.08%)** pada level **Rp14,235**.

| Top Gainer |           |           | Top Loser |           |           |
|------------|-----------|-----------|-----------|-----------|-----------|
| Ticker     | Last (Rp) | Change(+) | Ticker    | Last (Rp) | Change(-) |
| MIDI       | 2,490     | 490       | EDGE      | 20,425    | 1,525     |
| SCCO       | 10,625    | 350       | UNTR      | 22,550    | 1,100     |
| BNBA       | 1,710     | 340       | TKIM      | 14,775    | 925       |
| GDYR       | 3,030     | 310       | INKP      | 13,175    | 550       |
| BYAN       | 13,500    | 250       | INTP      | 12,500    | 550       |

| Top Foreign Buy |           |           | Top Foreign Sell |           |           |
|-----------------|-----------|-----------|------------------|-----------|-----------|
| Ticker          | NBVal (B) | NBLot     | Ticker           | NSVal (B) | NSLot     |
| ANTM            | 398       | 1,396,954 | ASII             | 436       | 804,871   |
| TLKM            | 289       | 834,382   | ACES             | 218       | 1,424,121 |
| BBRI            | 129       | 273,843   | BMRI             | 153       | 248,210   |
| BBCA            | 83        | 24,348    | BBNI             | 60        | 100,260   |
| BBTN            | 41        | 196,379   | UNTR             | 42        | 18,557    |

Source : IPOT

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