

# Evening Update

21 September 2021

Items	Avg 2020	Terakhir	H-1
Nilai transaksi (Rp miliar)	8.849,9	17.310,2	22.314,4
Volume transaksi (jt shm)	7.609,8	9.656,9	12.905,5
Net asing (Rp miliar)	-197,6	-242,9	598,3
Net asing (jt shm)	-313,0	-1.124,0	-693,7
Kapitalisasi pasar (Rp tn)	6.071,3	7.398,4	7.468,0

Index	Penutupan	1 year return	1 day return	YTD return
Technology	9,857	N/A	-2.5%	N/A
Financials	1,382	N/A	-0.3%	N/A
Healthcare	1,367	N/A	-0.6%	N/A
Basic Material	1,121	N/A	-1.8%	N/A
Transportation & Log	1,185	N/A	2.4%	N/A
Industrials	1,008	N/A	-1.4%	N/A
Infrastructure	961	N/A	-0.8%	N/A
Property	803	N/A	-1.0%	N/A
Energy	784	N/A	-0.5%	N/A
Consumer Cycl	786	N/A	-1.0%	N/A
Consumer Non-Cyclica	655	N/A	-1.7%	N/A

Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	6,076	21.5%	-0.9%	1.6%
FSSTI	Singapura	3,042	22.4%	0.0%	7.0%
KLCI	Malaysia	1,524	1.7%	-0.2%	-6.3%
SET	Thailand	1,603	25.7%	-1.4%	10.6%
KOSPI	Korsel	3,130	29.8%	-0.7%	9.3%
SENSEX	India	58,491	53.8%	-0.9%	22.5%
HSI	Hongkong	24,099	0.6%	-3.3%	-11.5%
NIKY	Jepang	30,500	30.6%	0.6%	8.9%
AS30	Australia	7,538	25.3%	-2.1%	9.9%
IBOV	Brasil	108,844	12.2%	-2.3%	-8.5%
DJI	Amerika	33,970	25.1%	-1.8%	11.0%
SX5P	Europa	3,474	20.1%	-1.4%	11.8%
UKX	Inqgris	6,904	18.9%	-0.9%	6.9%

Dual Listing (US\$)	Closing US\$	IDR	+/-	Daily % chg
TLKM	24.14	1,716.7	-0.05	-0.21%
TINS	0.089	1,267.4	0.00	-1.94%
*Rp/US\$	14,223			

Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	3.61%		
Kredit Bank IDR	12.23%		
BI 7-Days RR	3.50%	1.59%	1.91%
Fed Funds Target	0.25%	5.30%	-5.05%
ECB Main Refinancing	0.00%	3.00%	-3.00%
Domestic Yen Interest Call	-0.02%	-0.30%	0.28%

Harga Komoditas	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
Minyak WTI US\$/ bbl	70.3	78.8%	-1.7	-2.33%
CPO RM/ ton	4,443.0	43.2%	-75.0	-1.66%
Nikel US\$/ ton	19,075	28.4%	-314.0	-1.62%
Timah US\$/ ton	34,830	92.7%	-245.0	-0.70%
Emas US\$/tr. oz	1,764.2	-7.8%	9.8	0.55%
Batu Bara US\$/ ton	177.5	241.0%	0.0	0.00%
Tepung Terigu US\$/ ton	146.5	-7.0%	8.1	5.84%
Jaquung US\$/bushel	4.9	41.4%	0.0	-1.01%
Kedelai US\$/bushel	12.4	19.2%	-0.2	-1.71%
Tembaga US\$/ton	9,049.2	32.1%	-258.1	-2.77%

Sumber : Bloomberg

## Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan konsisten bergerak di zona merah dipicu oleh sentimen negatif dari melemahnya indeks di bursa Wall Street yang disebabkan oleh beberapa faktor seperti kekhawatiran investor akan meluasnya dampak gagal bayar perusahaan properti terbesar kedua di China yaitu Evergrande Group, penyebaran varian delta, sikap hati-hati investor menjelang keputusan bank sentral Amerika terkait tapering serta masih buntunya kondisi politik menjelang batas akhir penetapan debt ceiling. Sementara itu turunnya sebagian besar harga komoditas seperti CPO, nikel dan tembaga menjadi tambahan katalis negatif yang menekan pergerakan indeks.

**IHSG ditutup melemah -16 poin (-0,26%)** pada level **6.061**. Sektor keuangan dan sektor perindustrian yang masing-masing terkoreksi -14 poin (-1,01%) dan -9 poin (-0,84%) menjadi kontributor terbesar bagi pelemahan indeks harga saham gabungan hari ini. Sementara itu investor asing membukukan penjualan bersih (*foreign net sell*) sebesar 429,4 miliar di pasar reguler.

**Nilai tukar rupiah terhadap dolar Amerika menguat +5 poin (+0,04%)** pada level **Rp14.238**.

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
BLTZ	3.800	600	ARTO	15.700	475
MASA	3.500	470	BBCA	32.450	475
INTP	10.600	300	JECC	6.375	475
TECH	6.625	275	EDGE	26.600	450
UNIC	8.975	225	GGRM	31.450	450

Top Foreign Buy			Top Foreign Sell		
Ticker	NBVal (B)	NBLot	Ticker	NSVal (B)	NSLot
TLKM	45	128.170	BBRI	212	600.738
BUKA	37	435.073	BBCA	71	21.746
ASSA	20	58.363	ARTO	38	23.790
BTPS	17	52.465	EXCL	37	121.120
BBNI	16	31.059	ADRO	31	228.414

Source : IPOT

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