

# Evening Update

25 November 2021

| Items                       | Avg 2020 | Terakhir | H-1      |
|-----------------------------|----------|----------|----------|
| Nilai transaksi (Rp miliar) | 8,849.9  | 22,393.7 | 18,561.2 |
| Volume transaksi (lt shm)   | 7,609.8  | 11,019.4 | 10,892.5 |
| Net asina (Rp miliar)       | -197.6   | 420.3    | 94.1     |
| Net asina (lt shm)          | -313.0   | -111.7   | -53.3    |
| Kapitalisasi pasar (Rp tn)  | 6,071.3  | 6,472.3  | 6,467.1  |

| Index                | Penutupan | 1 year return | 1 day return | YTD return |
|----------------------|-----------|---------------|--------------|------------|
| Technology           | 9,236     | N/A           | -1.4%        | N/A        |
| Financials           | 1,552     | N/A           | 0.3%         | N/A        |
| Healthcare           | 1,424     | N/A           | -0.7%        | N/A        |
| Basic Material       | 1,249     | N/A           | 0.2%         | N/A        |
| Transportation & Log | 1,390     | N/A           | -0.4%        | N/A        |
| Industrials          | 1,078     | N/A           | -0.6%        | N/A        |
| Infrastruktur        | 988       | N/A           | 0.3%         | N/A        |
| Property             | 848       | N/A           | 0.1%         | N/A        |
| Enerav               | 1,058     | N/A           | 0.9%         | N/A        |
| Consumer Cycl        | 870       | N/A           | 0.3%         | N/A        |
| Consumer Non-Cyclica | 706       | N/A           | 0.0%         | N/A        |

| Index  | Negara    | Penutupan | 1 year return | 1 day return | YTD return |
|--------|-----------|-----------|---------------|--------------|------------|
| JCI    | Indonesia | 6,683     | 17.7%         | 0.1%         | 11.8%      |
| FSSTI  | Singapura | 3,227     | 12.5%         | 0.0%         | 13.5%      |
| KLCI   | Malaysia  | 1,522     | -4.7%         | 0.0%         | -6.4%      |
| SET    | Thailand  | 1,650     | 16.5%         | 0.2%         | 13.8%      |
| KOSPI  | Korsel    | 2,994     | 15.1%         | -0.1%        | 3.8%       |
| SENSEX | India     | 58,341    | 33.1%         | -0.6%        | 22.2%      |
| HSI    | Honakong  | 24,686    | -7.4%         | 0.1%         | -9.3%      |
| NIKY   | Jepang    | 29,303    | 11.4%         | -1.6%        | 7.6%       |
| AS30   | Australia | 7,726     | 12.2%         | -0.2%        | 13.0%      |
| IBOV   | Brasil    | 104,514   | -4.8%         | 0.8%         | -12.2%     |
| DJI    | Amerika   | 35,804    | 19.2%         | 0.0%         | 17.0%      |
| SXSP   | Eropa     | 3,738     | 21.2%         | 0.1%         | 20.3%      |
| UKX    | Inaqris   | 7,286     | 14.0%         | 0.3%         | 12.8%      |

|          | Closing US\$ | IDR     | +/-  | Daily % chg |
|----------|--------------|---------|------|-------------|
| TLKM     | 26.59        | 1,895.6 | 0.07 | 0.26%       |
| TINS     | 0.103        | 1,470.3 | 0.00 | -1.08%      |
| *Rp/US\$ | 14,258       |         |      |             |

| Items                      | Interest | Latest Inflation | Real interest rate |
|----------------------------|----------|------------------|--------------------|
| Deposito IDR 3 bln         | 3.46%    |                  |                    |
| Kredit Bank IDR            | 12.24%   |                  |                    |
| BI 7-Days RR               | 3.50%    | 1.66%            | 1.84%              |
| Fed Funds Target           | 0.25%    | 6.20%            | -5.95%             |
| ECB Main Refinancing       | 0.00%    | 4.10%            | -4.10%             |
| Domestic Yen Interest Call | -0.04%   | 0.10%            | -0.14%             |

|                         | Penutupan | Ret 1 year (%) | +/-     | Ret 1 day (%) |
|-------------------------|-----------|----------------|---------|---------------|
| Minyak WTI US\$/ bbl    | 78.4      | 71.5%          | -0.1    | -0.14%        |
| CPO RM/ ton             | 5,344.0   | 55.0%          | 55.0    | 1.04%         |
| Nikel US\$/ ton         | 21,036    | 29.9%          | 551.0   | 2.69%         |
| Timah US\$/ ton         | 41,118    | 119.8%         | 1,135.0 | 2.84%         |
| Emas US\$/tr. oz        | 1,788.6   | -1.0%          | -0.6    | -0.03%        |
| Batu Bara US\$/ ton     | 159.0     | 150.4%         | 2.0     | 1.27%         |
| Tepung Terigu US\$/ ton | 146.5     | -7.0%          | 8.1     | 5.84%         |
| Jaquana US\$/bushel     | 5.8       | 39.2%          | 0.0     | 0.00%         |
| Kedelai US\$/bushel     | 12.6      | 6.1%           | -0.1    | -0.71%        |
| Tembaca US\$/ton        | 9,895.0   | 35.9%          | 90.0    | 0.92%         |

Sumber: Bloomberg

## Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan konsisten bergerak di zona hijau. Naiknya beberapa harga komoditas seperti cpo, nikel, timah dan batu bara menjadi sentimen positif untuk indeks harga saham gabungan hari ini. Sementara itu menguatnya sebagian besar indeks di bursa Wall Street seiring naiknya saham sektor teknologi yang dipicu oleh turunnya yield obligasi pemerintah dengan tenor sepuluh tahun menjadi tambahan sentimen positif untuk indeks.

**IHSG ditutup menguat +16 poin (+0,24%)** pada level **6.699**. Sektor transportasi & logistik dan sektor infrastruktur yang masing-masing mengalami kenaikan +50 poin (+3,57%) dan +11 poin (+1,09%) menjadi kontributor terbesar bagi penguatan indeks harga saham gabungan hari ini. Sementara itu investor asing membukukan pembelian bersih (*foreign net buy*) sebesar 205,5 miliar di pasar reguler.

**Nilai tukar rupiah terhadap dolar Amerika melemah -23 poin (-0,16%)** pada level **Rp14.288**.

| Top Gainer |           |           | Top Loser |           |           |
|------------|-----------|-----------|-----------|-----------|-----------|
| Ticker     | Last (Rp) | Change(+) | Ticker    | Last (Rp) | Change(-) |
| DCII       | 46.000    | 3.000     | SCCO      | 9.675     | 725       |
| BPII       | 5.800     | 600       | BBHI      | 6.550     | 400       |
| SILO       | 9.750     | 550       | HRUM      | 9.425     | 375       |
| ITMG       | 21.550    | 475       | GGRM      | 33.450    | 300       |
| UNTR       | 22.850    | 400       | INTP      | 11.050    | 300       |

| Top Foreign Buy |           |           | Top Foreign Sell |           |           |
|-----------------|-----------|-----------|------------------|-----------|-----------|
| Ticker          | NBVal (B) | NBLot     | Ticker           | NSVal (B) | NSLot     |
| TLKM            | 411       | 1.028.514 | BUKA             | 148       | 2.336.008 |
| BMRI            | 88        | 120.696   | EXCL             | 37        | 121.264   |
| DEPO            | 36        | 649.953   | ASII             | 34        | 53.769    |
| KLBF            | 32        | 197.754   | BBCA             | 31        | 42.188    |
| ASSA            | 31        | 83.384    | NATO             | 30        | 403.622   |

Source: IPOT

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