

# Evening Update

29 November 2021

Items	Avg 2020	Terakhir	H-1
Nilai transaksi (Rp miliar)	8,849.9	24,116.8	21,407.2
Volume transaksi (jt shm)	7,609.8	14,425.2	11,945.4
Net asing (Rp miliar)	-197.6	-145.7	-14.2
Net asing (jt shm)	-313.0	-257.5	-427.2
Kapitalisasi pasar (Rp tn)	6,071.3	6,357.1	6,490.6

Sektoral					
Index	Penutupan	1 year return	1 day return	YTD return	
Technology	9,023	N/A	-1.2%	N/A	
Financials	1,522	N/A	-2.2%	N/A	
Healthcare	1,435	N/A	0.2%	N/A	
Basic Material	1,215	N/A	-2.8%	N/A	
Transportation & Log	1,427	N/A	-0.8%	N/A	
Industrials	1,047	N/A	-3.6%	N/A	
Infrastruktur	983	N/A	-1.5%	N/A	
Property	816	N/A	-2.5%	N/A	
Energy	1,034	N/A	-2.6%	N/A	
Consumer Cyclic	851	N/A	-2.0%	N/A	
Consumer Non-Cyclic	688	N/A	-1.9%	N/A	

Indeks Saham					
Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	6,562	13.5%	-2.1%	9.7%
ISSTI	Singapura	3,166	10.9%	-1.7%	11.3%
KLCI	Malaysia	1,512	-5.9%	-0.4%	-7.1%
SET	Thailand	1,611	12.0%	-2.3%	11.1%
KOSPI	Korsel	2,936	11.5%	-1.5%	1.4%
SENSEX	India	57,107	29.3%	-2.9%	19.6%
HSI	Hongkong	24,081	-10.5%	-2.7%	-11.6%
NKY	Jepang	28,752	7.9%	-2.5%	3.7%
AS30	Australia	7,600	11.5%	-1.8%	10.3%
IBOV	Brasil	102,224	-7.6%	-3.4%	-14.1%
DJI	Amerika	34,899	16.7%	-2.5%	14.0%
SX5P	Eropa	3,607	16.7%	-3.8%	16.0%
UKX	Ingris	7,044	10.6%	-3.6%	9.0%

Dual Listing (US\$)				
	Closing US\$	IDR	+/-	Daily % chg
TLKM	27.56	1,966.1	0.97	-3.65%
TINS	0.100	1,425.9	-0.01	-5.85%
*Rp/US\$	14,268			

Suku Bunga & Inflasi			
Items	Interest	Latest Inflation	Real interest rate
Deposito IDR 3 bln	3.43%		
Kredit Bank IDR	12.23%		
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%

Harga Komoditas				
	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
Minyak WTI US\$/ bbl	68.2	49.7%	-10.2	-13.06%
CPO RM/ ton	5,269.0	54.1%	-66.0	-1.24%
Nikel US\$/ ton	20,070	23.7%	-785.0	-3.76%
Timah US\$/ ton	39,607	110.2%	-1,177.0	-2.89%
Emas US\$/tr. oz	1,802.6	1.4%	13.7	0.77%
Batu Bara US\$/ ton	157.5	146.7%	-0.5	-0.32%
Tepung Terigu US\$/ ton	146.5	-7.0%	8.1	5.84%
Jaune US\$/bushel	5.8	42.6%	0.1	1.22%
Kedelai US\$/bushel	12.5	5.6%	-0.1	-1.09%
Tembaga US\$/ton	9,572.0	29.6%	-319.5	-3.23%

Sumber: Bloomberg

## Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan bergerak bervariasi dan akhirnya ditutup menguat signifikan. Ditutup sementara pintu masuk ke Indonesia bagi WNA yang pernah mengunjungi negara terkonfirmasi varian baru Covid19 Omicron (beberapa negara di Afrika dan Hong Kong) serta ditingkatkannya kembali masa karantina bagi pendatang dari luar negeri dari sebelumnya 3 hari ke 7 hari berhasil menjadi sentimen positif yang mendorong indeks ke zona hijau. Di sisi lain melemah cukup tajamnya indeks di bursa Wall Street dan harga komoditas yang dipicu oleh kekhawatiran investor terhadap munculnya varian baru yang menurut dugaan awal lebih berbahaya dibandingkan dengan varian Delta menjadi sentimen negatif yang menekan indeks.

**IHSG ditutup menguat +47 poin (+0,71%)** pada level **6.608**. Sektor infrastruktur dan sektor transportasi & logistik yang masing-masing mengalami kenaikan +16 poin (+1,59%) dan +17 poin (+1,20%) menjadi kontributor terbesar bagi penguatan indeks harga saham gabungan hari ini. Sementara itu investor asing membukukan penjualan bersih (*foreign net sell*) sebesar 1,03 triliun di pasar reguler.

**Nilai tukar rupiah terhadap dolar Amerika menguat +39 poin (+0,27%)** pada level **Rp14.319**.

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
ARTO	15.375	625	UNIC	11.200	575
ITMG	20.875	450	SILO	10.400	450
ISAT	7.850	450	GGRM	32.775	400
STTP	7.750	425	MCAS	14.150	350
BBHI	6.800	375	BBSI	5.175	325

Top Foreign Buy			Top Foreign Sell		
Ticker	NBVal (B)	NBLot	Ticker	NSVal (B)	NSLot
TLKM	102	250.565	ASII	176	299.857
ITMG	31	15.007	BBCA	174	237.977
ARTO	22	14.789	BMRI	170	239.567
BANK	18	67.859	BBRI	162	388.836
DMMX	13	43.763	SMGR	48	57.885

Source: IPOI

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