

Evening Update

25 January 2022

Items	Avg 2021	Terakhir	H-1
Nilai transaksi (Rp miliar)	18,002.4	17,572.4	15,403.1
Volume transaksi (jt shm)	11,667.8	9,093.5	9,547.0
Net asing (Rp miliar)	155.6	-2.9	972.7
Net asing (jt shm)	-185.2	-952.6	-304.9
Kapitalisasi pasar (Rp tn)	6,977.9	4,867.1	4,919.2

Sektoral				
Index	Penutupan	1 year return	1 day return	YTD return
Technology	7,905	N/A	-2.9%	-12.1%
Financials	1,580	N/A	-1.4%	3.5%
Healthcare	1,423	N/A	-0.4%	0.2%
Basic Material	1,192	N/A	-0.9%	-3.5%
Transportation & Log	1,617	N/A	0.6%	1.1%
Industrials	1,036	N/A	-0.5%	-0.1%
Infrastruktur	934	N/A	-1.3%	-2.6%
Property	731	N/A	-0.3%	-5.5%
Energy	1,274	N/A	0.7%	11.8%
Consumer Cycl	853	N/A	-0.5%	-5.2%
Consumer Non-Cyclica	659	N/A	-0.9%	-0.7%

Indeks Saham					
Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	6,655	6.3%	-1.1%	1.1%
FSSTI	Singapura	3,283	10.4%	-0.3%	5.1%
KLCI	Malaysia	1,522	-3.5%	-0.3%	-2.9%
SET	Thailand	1,641	9.3%	-0.7%	-1.0%
KOSPI	Korsel	2,792	-13.0%	-1.5%	-8.0%
SENSEX	India	57,492	18.9%	-2.6%	-1.3%
HSI	Hongkong	24,656	-18.2%	-1.2%	5.4%
NKY	Jepang	27,588	-4.3%	0.2%	-5.3%
AS30	Australia	7,442	4.6%	-0.6%	-6.4%
IBOV	Brasil	107,937	-8.0%	-0.9%	3.0%
DJI	Amerika	34,365	10.9%	0.3%	-5.4%
SXSP	Eropa	3,646	15.0%	-3.6%	-4.5%
UKX	Inggris	7,297	9.9%	-2.6%	-1.2%

Dual Listing (US\$)				
	Closing US\$	IDR	+/-	Daily % chg
TLKM	29.37	2,105.5	-0.17	-0.58%
TINS	0.093	1,331.1	0.00	2.50%
*Rp/US\$	14,338			

Suku Bunga & Inflasi				
Items	Interest	Inflation	Real interest rate	
Deposito IDR 3 bln	3.36%			
Kredit Bank IDR	12.42%			
BI 7-Days RR	3.50%	1.87%	1.63%	
Fed Funds Target	0.25%	7.00%	-6.75%	
ECB Main Refinancing	0.00%	5.00%	-5.00%	
Domestic Yen Interest Call	-0.02%	0.80%	-0.82%	

Harga Komoditas				
	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
Minyak WTI US\$/ bbl	83.8	58.7%	0.5	0.55%
CPO RM/ ton	5,390.0	51.8%	-48.0	-0.88%
Nikel US\$/ ton	22,677	24.4%	-1,643.0	-6.76%
Timah US\$/ ton	42,991	92.1%	-1,512.0	-3.40%
Emas US\$/tr. oz	1,843.1	-0.7%	7.7	0.42%
Batu Bara US\$/ ton	225.3	162.2%	0.7	0.29%
Tepung Terigu US\$/ ton	146.5	-7.0%	8.1	5.84%
Jaquung US\$/bushel	6.1	25.7%	0.1	0.83%
Kedelai US\$/bushel	13.9	6.0%	0.1	-0.80%
Tembaga US\$/ton	9,763.0	22.1%	-221.0	-2.21%

Sumber: Bloomberg

Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan konsisten bergerak di zona merah dan akhirnya ditutup melemah signifikan dipicu oleh sentimen negatif dari merebaknya kasus omicron dalam negeri yang sudah didominasi oleh transmisi lokal serta sikap hati-hati investor menjelang rapat The Fed yang diperkirakan cenderung hawkish. Sementara itu melemahnya indeks di bursa regional yang dipicu oleh kekhawatiran investor terkait ketegangan geopolitik di Eropa turut menjadi sentimen negatif tambahan yang menekan indeks.

IHSG ditutup melemah -87 poin (-1,31%) pada level **6.568**. Sektor teknologi dan sektor transportasi & logistik yang masing-masing terkoreksi -306 poin (-3,88%) dan -43 poin (-2,68%) menjadi kontributor terbesar bagi pelemahan indeks harga saham gabungan hari ini. Sementara itu investor asing membukukan pembelian bersih (*foreign net buy*) sebesar 36,6 miliar di pasar reguler.

Nilai tukar rupiah terhadap dolar Amerika melemah -15 poin (-0,10%) pada level **Rp14.350**.

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
BRAM	12.300	1.925	ARTO	17.075	1.275
KONI	3.450	690	DCII	43.000	800
BEBE	4.750	450	GEMS	6.850	475
TECH	4.220	410	HRUM	10.250	450
PTSP	6.300	250	ABDA	6.175	425

Top Foreign Buy			Top Foreign Sell		
Ticker	NBVal (B)	NBLot	Ticker	NSVal (B)	NSLot
TLKM	123	286.831	BBRI	195	480.697
ADRO	122	554.860	BBCA	145	189.181
ASII	63	115.714	ARTO	88	50.666
BMRI	57	78.471	ANTM	25	140.662
BRMS	39	3.059.946	BUKA	21	599.777

Source: IPOT

Evening Update

25 January 2022

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ANALYSTS CERTIFICATION

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