

Evening Update

23 September 2022

Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan bergerak konsisten bergerak di zona merah dipicu oleh sentimen negatif dari kembali terkoreksinya indeks di bursa Wall Street seiring kekhawatiran investor akan potensi resesi seiring kegagresifan The Fed dalam menaikkan suku bunga acuan. Sementara itu terkoreksinya harga komoditas CPO, nikel, batu bara, dan tembaga menjadi katalis negatif tambahan yang menekan indeks.

IHSG ditutup melemah -40 poin (-0,56%) pada level **7.179**. Sektor energi dan sektor properti & real estat yang terkoreksi -29 poin (-1,41%) dan -8 poin (-1,11%) menjadi kontributor terbesar bagi pelemahan indeks harga saham gabungan hari ini.

Nilai tukar rupiah terhadap dolar Amerika melemah **-15 poin (-0,10%)** pada level **Rp15.038**.

Items	Avg 2021	Terakhir	H-1
Nilai transaksi (Rp miliar)	18,002.4	27,533.5	24,010.2
Volume transaksi (jt shm)	11,667.8	11,901.5	11,466.2
Net asing (Rp miliar)	155.6	835.3	-911.9
Net asing (jt shm)	-185.2	-179.6	-375.1
Kapitalisasi pasar (Rp tn)	6,977.9	2,831.2	2,819.2

Sektoral				
Index	Penutupan	1 year return	1 day return	YTD return
Technology	7,438	-24.8%	-0.4%	-17.3%
Financials	1,508	7.6%	0.0%	-1.3%
Healthcare	1,466	7.9%	-0.4%	3.2%
Basic Material	1,305	16.0%	1.3%	5.7%
Transportation & Log	1,853	64.8%	0.5%	15.8%
Industrials	1,369	37.5%	1.1%	32.0%
Infrastructure	1,019	5.5%	0.6%	6.2%
Property	720	-10.2%	0.1%	-6.8%
Energy	2,020	147.3%	2.2%	77.3%
Consumer Cyclical	878	8.7%	-0.4%	-2.5%
Consumer Non-Cyclical	704	5.8%	0.4%	5.9%

Indeks Saham					
Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	7,219	17.5%	0.4%	9.7%
FSSTI	Singapura	3,263	6.1%	0.0%	4.5%
KLCI	Malaysia	1,439	-6.5%	-0.6%	-8.2%
SET	Thailand	1,645	0.9%	0.7%	-0.7%
KOSPI	Korsel	2,332	-25.4%	-0.6%	-22.4%
SENSEX	India	59,120	-1.3%	-0.6%	1.5%
HSI	Hongkong	18,148	-26.0%	-1.6%	-22.4%
NKY	Jepang	27,313	-7.8%	-1.4%	-5.7%
AS30	Australia	6,921	-9.3%	0.0%	-12.3%
IBOV	Brasil	114,071	0.0%	1.9%	8.8%
DJI	Amerika	30,077	-13.5%	-0.4%	-17.2%
SXSP	Eropa	3,406	-4.8%	-1.5%	-10.8%
UKX	Inqgris	7,160	1.1%	-1.1%	-3.0%

Dual Listing (US\$)				
	Closing US\$	IDR	+/-	Daily % chg
TLKM	29.30	2,197.2	0.27	0.93%
TINS	0.084	1,254.8	0.00	1.80%
*Rp/US\$	14,998			

Suku Bunga & Inflasi			
Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	3.26%		
Kredit Bank IDR	12.80%		
BI 7-Days RR	4.25%	4.69%	-0.44%
Fed Funds Target	3.25%	8.30%	5.05%
ECB Main Refinancing	125.00%	9.10%	115.90%
Domestic Yen Interest Call	-0.06%	3.00%	-3.06%

Harga Komoditas				
	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
Minyak WTI US\$/ bbl	83.5	13.9%	0.5	0.66%
CPO RM/ ton	3,730.0	-19.9%	-31.0	-0.82%
Nikel US\$/ ton	24,482	27.3%	-400.0	-1.61%
Timah US\$/ ton	21,715	-40.2%	490.0	2.31%
Emas US\$/tr. oz	1,674.0	-3.9%	2.8	0.17%
Batu Bara US\$/ ton	435.7	141.4%	-8.8	-1.99%
Gandum US\$/bushel	9.11	26.9%	0.1	0.77%
Jagung US\$/bushel	6.88	30.0%	0.0	0.40%
Kedelai US\$/bushel	14.57	13.5%	0.0	-0.29%
Tembaga US\$/ton	7,739.0	-16.8%	-10.0	-0.13%

Sumber: Bloomberg

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
NFCX	12.275	725	UNTR	34.000	1.100
EDGE	21.650	600	ITMG	43.250	525
STTP	7.500	250	BRAM	8.325	425
YPAS	985	195	MBAP	9.250	425
INKP	9.275	175	BYAN	65.400	300

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