

Evening Update

27 September 2022

Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan bergerak bervariasi dan akhirnya ditutup di zona merah. Kembali terkoreksinya indeks di bursa Wall Street seiring berlanjutnya kekhawatiran investor terhadap potensi resesi di Amerika menjadi sentimen negatif di pasar. Sementara itu berbalik menguatnya harga batu bara berhasil menjadi sentimen positif yang sempat membawa indeks ke zona hijau.

IHSG ditutup melemah -15 poin (-0,21%) pada level **7.112**. Sektor barang baku dan sektor keuangan yang terkoreksi -12 poin (-0,96%) dan -5 poin (-0,34%) menjadi kontributor terbesar bagi pelemahan indeks harga saham gabungan hari ini.

Nilai tukar rupiah terhadap dolar Amerika menguat **+6 poin (+0,04%)** pada level **Rp15.124**.

Items	Avg 2021	Terakhir	H-1
Nilai transaksi (Rp miliar)	18,002.4	19,340.0	20,550.9
Volume transaksi (jt shm)	11,667.8	13,659.5	11,400.0
Net asing (Rp miliar)	155.6	-1,364.9	-767.9
Net asing (jt shm)	-185.2	-646.6	-506.5
Kapitalisasi pasar (Rp tn)	6,977.9	2,795.3	2,815.4

Sektoral				
Index	Penutupan	1 year return	1 day return	YTD return
Technology	7,219	-26.5%	-2.3%	-19.7%
Financials	1,508	8.7%	0.2%	-1.2%
Healthcare	1,462	7.5%	-0.3%	2.9%
Basic Material	1,284	15.4%	-1.3%	4.0%
Transportation & Log	1,838	65.2%	-1.3%	14.9%
Industrials	1,318	29.9%	-2.7%	27.2%
Infrastructure	1,006	5.7%	-1.2%	4.9%
Property	706	-12.9%	-0.8%	-8.6%
Energy	1,912	124.0%	-4.0%	67.8%
Consumer Cyclical	873	5.6%	-0.3%	-3.1%
Consumer Non-Cyclical	704	7.0%	-0.6%	6.0%

Indeks Saham					
Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	7,128	16.4%	-0.7%	8.3%
FSSTI	Singapura	3,182	2.6%	-1.4%	1.9%
KLCI	Malaysia	1,413	-7.8%	-0.8%	-9.9%
SET	Thailand	1,621	0.1%	-0.6%	-2.2%
KOSPI	Korsel	2,221	-29.1%	-3.0%	-25.6%
SENSEX	India	57,145	-4.9%	-1.6%	-1.9%
HSI	Hongkong	17,855	-26.2%	-0.4%	-23.7%
NKY	Jepang	26,432	-12.6%	-2.7%	-7.7%
AS30	Australia	6,667	-13.3%	-1.8%	-13.8%
IBOV	Brasil	109,114	-3.9%	-2.3%	4.1%
DJI	Amerika	29,261	-16.1%	-1.1%	-19.5%
SXSP	Eropa	3,322	-6.4%	-0.4%	-13.0%
UKX	Inqgris	7,021	-0.6%	0.0%	-4.9%

Dual Listing (US\$)				
	Closing US\$	IDR	+/-	Daily % chg
TLKM	28.91	2,173.7	0.20	0.70%
TINS	0.080	1,209.8	0.00	0.00%
*Rp/US\$	15,038			

Suku Bunga & Inflasi			
Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	3.28%		
Kredit Bank IDR	12.83%		
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	76.7	1.7%	-2.0	-2.58%
CPO RM/ ton	3,440.0	-25.7%	-41.0	-1.18%
Nikel US\$/ ton	22,039	13.6%	-1,258.5	-5.40%
Timah US\$/ ton	20,646	-45.8%	385.0	1.90%
Emas US\$/tr. oz	1,629.7	6.9%	7.4	0.45%
Batu Bara US\$/ ton	438.0	141.3%	2.8	0.64%
Gandum US\$/bushel	8.58	18.8%	-0.2	-2.56%
Jagung US\$/bushel	6.66	23.5%	-0.1	-1.55%
Kedelai US\$/bushel	14.11	9.6%	-0.1	-1.02%
Tembaga US\$/ton	7,430.0	-20.5%	-88.0	-1.17%

Sumber: Bloomberg

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
IBST	7.375	550	PRDA	5.175	325
STTP	7.600	500	ICBP	8.850	225
ITMG	41.750	450	TECH	6.275	225
TFAS	4.800	320	DCII	37.800	200
BPII	9.600	300	GGRM	22.850	200

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