

Evening Update

30 September 2022

Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan bergerak bervariasi dan akhirnya ditutup di zona hijau. Melemahnya indeks di bursa Wall Street seiring dengan berlanjutnya kekhawatiran investor terhadap perlambatan ekonomi AS atau bahkan masuk jurang resesi yang dipicu sikap agresif bank sentral menjadi sentimen negatif bagi indeks. Sementara itu menguatnya harga komoditas logam berhasil menjadi sentimen positif yang membawa indeks ke zona hijau.

IHSG ditutup menguat +5 poin (+0,07%) pada level **7.041**. Sektor kesehatan dan sektor energi yang mengalami kenaikan +21 poin (+1,39%) dan +12 poin (+0,65%) menjadi kontributor terbesar bagi penguatan indeks harga saham gabungan hari ini.

Nilai tukar rupiah terhadap dolar Amerika menguat **+36 poin (+0,23%)** pada level **Rp15.227**.

Items	Avg 2021	Terakhir	H-1
Nilai transaksi (Rp miliar)	18,002.4	21,414.2	19,342.2
Volume transaksi (jt shm)	11,667.8	10,653.8	10,829.9
Net asing (Rp miliar)	155.6	-622.9	-116.5
Net asing (jt shm)	-185.2	351.5	-1,231.4
Kapitalisasi pasar (Rp tn)	6,977.9	2,759.5	2,775.5

Index	Penutupan	1 year return	1 day return	YTD return
Technology	7,046	-25.4%	-1.9%	-21.7%
Financials	1,481	4.7%	-1.0%	-3.0%
Healthcare	1,477	8.7%	0.9%	4.0%
Basic Material	1,240	10.3%	-0.6%	0.5%
Transportation & Log	1,784	58.6%	-1.6%	11.5%
Industrials	1,280	18.3%	-1.4%	23.5%
Infrastructure	992	1.6%	-0.8%	3.4%
Property	697	-15.0%	-1.0%	-9.8%
Energy	1,908	91.5%	0.1%	67.4%
Consumer Cyclical	858	0.4%	-0.5%	-4.7%
Consumer Non-Cyclical	698	3.6%	-0.5%	5.2%

Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	7,036	11.9%	-0.6%	6.9%
FSSTI	Singapura	3,115	0.9%	0.0%	-0.3%
KLCI	Malaysia	1,398	-9.1%	-0.3%	-10.8%
SET	Thailand	1,592	-0.8%	-0.4%	-3.9%
KOSPI	Korsel	2,171	-29.3%	0.1%	-28.0%
SENSEX	India	56,410	-4.6%	-0.3%	-3.2%
HSI	Hongkong	17,166	-30.2%	-0.5%	-26.6%
NKY	Jepang	26,422	-10.3%	0.9%	-9.3%
AS30	Australia	6,761	-11.4%	1.5%	-13.7%
IBOV	Brasil	107,664	-3.0%	-0.7%	2.7%
DJI	Amerika	29,226	-13.6%	-1.5%	-19.6%
SXSP	Eropa	3,310	-5.4%	-1.1%	-13.3%
UKX	Inqgris	6,882	-2.9%	-1.8%	-6.8%

Dual Listing (US\$)	Closing US\$	IDR	+/-	Daily % chg
TLKM	28.85	2,201.7	-0.70	-2.37%
TINS	0.077	1,176.8	0.00	-4.27%
*Rp/US\$	15,263			

Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	3.32%		
Kredit Bank IDR	12.77%		
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	-0.07%	3.00%	-3.07%

Harga Komoditas	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
Minyak WTI US\$/ bbl	81.2	8.3%	-0.9	-1.12%
CPO RM/ ton	3,278.0	-30.4%	134.0	4.26%
Nikel US\$/ ton	22,250	21.2%	557.5	2.57%
Timah US\$/ ton	20,543	-44.2%	-205.3	-0.99%
Emas US\$/tr. oz	1,664.2	-5.3%	3.7	0.22%
Batu Bara US\$/ ton	435.8	107.0%	-0.3	-0.06%
Gandum US\$/bushel	8.96	23.5%	-0.1	-0.77%
Jagung US\$/bushel	6.70	24.7%	0.0	-0.15%
Kedelai US\$/bushel	14.11	12.3%	0.0	0.14%
Tembaga US\$/ton	7,647.0	-16.6%	127.0	1.69%

Sumber: Bloomberg

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
TGKA	8.300	1.200	SUPR	38.675	2.900
BYAN	67.000	1.000	HEXA	6.500	475
STTP	7.600	450	TFAS	5.125	375
TECH	5.900	350	GGRM	22.925	300
EDGE	21.625	225	UNTR	32.825	300

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