

# Evening Update

5 October 2022

## Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan konsisten bergerak di zona hijau dipicu oleh sentimen positif dari berlanjutnya penurunan imbal hasil obligasi pemerintah dengan tenor sepuluh tahun seiring dengan adanya harapan investor bahwa bank sentral akan mengubah sikapnya setelah rilis data ketenagakerjaan yang buruk. Sementara itu naiknya harga komoditas seperti cpo dan nikel berhasil menjadi katalis positif tambahan untuk indeks harga saham gabungan.

**IHSG ditutup menguat +3 poin (+0,04%)** pada level **7.075**. Sektor transportasi & logistik dan sektor teknologi yang mengalami kenaikan +50 poin (+2,80%) dan +127 poin (+1,84%) menjadi kontributor terbesar bagi penguatan indeks harga saham gabungan hari ini.

**Nilai tukar rupiah** terhadap dolar Amerika menguat **+55 poin (+0,36%)** pada level **Rp15.192**.

Items	Avg 2021	Terakhir	H-1
Nilai transaksi (Rp miliar)	18,002.4	21,637.8	17,999.6
Volume transaksi (jt shm)	11,667.8	11,738.0	9,339.4
Net asing (Rp miliar)	155.6	604.5	34.5
Net asing (jt shm)	-185.2	-778.5	-248.6
Kapitalisasi pasar (Rp tn)	6,977.9	2,773.7	2,749.1

Index	Penutupan	1 year return	1 day return	YTD return
Technology	6,932	-23.5%	-0.3%	-22.9%
Financials	1,487	5.1%	0.8%	-2.6%
Healthcare	1,457	10.2%	-0.2%	2.6%
Basic Material	1,254	11.8%	2.0%	1.6%
Transportation & Log	1,800	60.5%	2.2%	12.5%
Industrials	1,298	19.8%	1.2%	25.2%
Infrastructure	982	2.5%	0.6%	2.4%
Property	691	-18.5%	0.4%	-10.6%
Energy	1,995	91.9%	3.2%	75.0%
Consumer Cyclical	850	1.9%	0.2%	-5.5%
Consumer Non-Cyclical	700	2.5%	0.1%	5.4%

Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	7,072	12.5%	0.9%	7.5%
FSSTI	Singapura	3,139	2.3%	1.0%	0.5%
KLCI	Malaysia	1,409	-7.9%	0.8%	-10.1%
SET	Thailand	1,578	-2.8%	1.3%	-4.8%
KOSPI	Korsel	2,209	-25.4%	2.5%	-25.6%
SENSEX	India	58,065	-2.8%	2.2%	-0.3%
HSI	Hongkong	17,080	-28.9%	-0.8%	-27.0%
NKY	Jepang	26,992	-3.0%	3.0%	-5.8%
AS30	Australia	6,905	-8.4%	3.7%	-9.8%
IBOV	Brasil	116,230	5.2%	0.1%	10.9%
DJI	Amerika	30,316	-11.7%	2.8%	-16.6%
SXSP	Eropa	3,447	-1.9%	3.0%	-9.7%
UKX	Inqgris	7,086	0.1%	2.6%	-4.0%

Dual Listing (US\$)	Closing US\$	IDR	+/-	Daily % chg
TLKM	29.36	2,246.5	0.16	0.55%
TINS	0.081	1,236.6	0.00	0.00%
*Rp/US\$	15,303			

Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	3.32%		
Kredit Bank IDR	12.78%		
BI 7-Days RR	4.25%	5.95%	-1.70%
Fed Funds Target	3.25%	8.30%	5.05%
ECB Main Refinancing	125.00%	10.00%	115.00%
Domestic Yen Interest Call	-0.06%	3.00%	-3.06%

Harga Komoditas	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
Minyak WTI US\$/ bbl	86.5	9.6%	2.9	3.46%
CPO RM/ ton	3,501.0	-27.6%	181.0	5.45%
Nikel US\$/ ton	21,934	22.4%	792.5	3.75%
Timah US\$/ ton	20,254	-43.2%	151.0	0.75%
Emas US\$/tr. oz	1,723.0	-2.1%	-3.1	-0.18%
Batu Bara US\$/ ton	404.0	68.3%	2.5	0.62%
Gandum US\$/bushel	9.03	21.2%	-0.1	-0.99%
Jagung US\$/bushel	6.83	27.1%	0.0	0.33%
Kedelai US\$/bushel	13.84	10.6%	0.1	0.69%
Tembaga US\$/ton	7,800.0	-15.7%	197.5	2.60%

Sumber: Bloomberg

	Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)	
DCII	37.300	500	UNTR	33.075	725	
BYAN	67.200	350	ITMG	43.600	550	
TCPI	9.350	325	EDGE	21.950	350	
NFCX	12.400	300	PTSP	4.750	350	
TMAS	1.860	230	TFAS	4.130	310	

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## **PT INDO PREMIER SEKURITAS**

Pacific Century Place 16th Floor SCBD Lot 10  
Jl. Jend. Sudirman Kav. 52-53  
Jakarta Selatan 12190 - Indonesia  
p +62 21 5088 7200

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