

Evening Update

24 November 2022

Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan konsisten bergerak di zona hijau dipicu oleh sentimen positif dari menguatnya indeks di bursa Wall Street seiring dengan adanya sinyal dari the Fed yang dapat mengurangi besaran kenaikan suku bunga acuan sesuai dengan notulen rapat bulan November yang baru dirilis.

IHSG ditutup menguat +26 poin (+0,37%) pada level **7.081**. Sektor properti & real estat dan sektor kesehatan yang mengalami kenaikan +14 poin (+1,98%) dan +12 poin (+0,83%) menjadi kontributor terbesar bagi penguatan indeks harga saham gabungan hari ini.

Nilai tukar rupiah terhadap dolar Amerika menguat +23 poin (+0,14%) pada level **Rp15.664**.

Items	Avg 2021	Terakhir	H-1
Nilai transaksi (Rp miliar)	18.002,4	15.685,8	17.695,7
Volume transaksi (jt shm)	11.667,8	9.379,0	9.674,0
Net asing (Rp miliar)	155,6	628,4	433,5
Net asing (jt shm)	-185,2	485,1	322,9
Kapitalisasi pasar (Rp tn)	6.977,9	2.776,3	2.767,1

Sektoral				
Index	Penutupan	1 year return	1 day return	YTD return
Technology	6,571	-28.9%	-0.7%	-26.9%
Financials	1,498	-3.5%	1.0%	-1.9%
Healthcare	1,474	3.5%	0.0%	3.8%
Basic Material	1,288	3.1%	0.2%	4.3%
Transportation & Log	1,810	44.9%	1.0%	13.1%
Industrials	1,230	14.1%	-0.1%	18.6%
Infrastructure	909	-8.0%	0.0%	-5.2%
Property	698	-17.7%	0.6%	-9.8%
Energy	2,087	97.2%	1.2%	83.2%
Consumer Cyclical	889	2.2%	0.0%	-1.3%
Consumer Non-Cyclical	731	3.5%	0.5%	10.0%

Indeks Saham					
Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	7,054	5.5%	0.3%	7.2%
FSSTI	Singapura	3,236	0.9%	-0.1%	4.2%
KLCI	Malaysia	1,444	-5.2%	0.2%	-7.9%
SET	Thailand	1,624	-1.5%	0.6%	-2.0%
KOSPI	Korsel	2,418	-19.2%	0.5%	-18.4%
SENSEX	India	61,511	5.4%	0.1%	5.6%
HSI	Hongkong	17,524	-29.0%	0.6%	-25.1%
NKY	Jepang	28,116	-5.6%	0.6%	-1.1%
AS30	Australia	7,422	-3.9%	0.6%	-4.3%
IBOV	Brasil	108,841	5.0%	-0.2%	3.8%
DJI	Amerika	34,194	-4.5%	0.3%	-5.9%
SX5P	Eropa	3,760	0.6%	0.5%	-1.5%
UKX	Inqgris	7,465	2.5%	0.2%	1.1%

Dual Listing (US\$)				
	Closing US\$	IDR	+/-	Daily % chg
TLKM	25.26	1,982.7	-0.23	-0.90%
TINS	0.094	1,479.6	0.02	24.83%
*Rp/US\$	15,698			

Suku Bunga & Inflasi			
Items	Latest		Real interest rate
	Interest	Inflation	
Deposito IDR 3 bln	3.61%		
Kredit Bank IDR	12.82%		
BI 7-Days RR	5.25%	5.71%	-0.46%
Fed Funds Target	4.00%	7.70%	-3.70%
ECB Main Refinancing	200.00%	10.60%	189.40%
Domestic Yen Interest Call	-0.07%	3.70%	-3.77%

Harga Komoditas				
	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
Minyak WTI US\$/ bbl	77.9	-0.6%	-3.0	-3.72%
CPO RM/ ton	4,000.0	-25.1%	-36.0	-0.89%
Nikel US\$/ ton	26,154	27.7%	259.3	1.00%
Timah US\$/ ton	22,055	-44.8%	-164.0	-0.74%
Emas US\$/tr. oz	1,754.2	-1.9%	4.5	0.26%
Batu Bara US\$/ ton	346.5	120.7%	-0.7	-0.20%
Gandum US\$/bushel	7.92	-7.5%	-0.1	-0.97%
Jagung US\$/bushel	6.57	13.1%	0.0	-0.42%
Kedelai US\$/bushel	14.30	12.3%	-0.1	-0.49%
Tembaga US\$/ton	7,962.3	-18.8%	-13.0	-0.16%

Sumber: Bloomberg

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
UNTR	29.975	350	BYAN	93.000	1.500
TCPI	9.625	325	NFCX	9.300	700
ITMG	41.650	275	DCII	36.475	300
STTP	7.875	225	LINK	3.100	230
DSSA	39.800	200	MCOL	7.000	175

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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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