

Evening Update

25 November 2022

Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan hampir konsisten bergerak di zona merah. Aksi profit taking pada saham-saham sektor energi menjadi sentimen negatif bagi indeks. Sementara itu berlanjutnya pelemahan pada saham-saham sektor teknologi juga menjadi tambahan sentimen negatif yang menekan pergerakan indeks.

IHSG ditutup melemah -27 poin (-0,39%) pada level **7.053**. Sektor energi dan sektor teknologi yang terkoreksi -27 poin (-1,31%) dan -67 poin (-1,04%) menjadi kontributor terbesar bagi pelemahan indeks harga saham gabungan hari ini.

Nilai tukar rupiah terhadap dolar Amerika melemah **-8 poin (-0,05%)** pada level **Rp15.673**.

Items	Avg 2021	Terakhir	H-1
Nilai transaksi (Rp miliar)	18.002,4	15.947,6	15.685,8
Volume transaksi (jt shm)	11.667,8	8.807,3	9.379,0
Net asing (Rp miliar)	155,6	969,1	628,4
Net asing (jt shm)	-185,2	370,5	485,1
Kapitalisasi pasar (Rp tn)	6.977,9	2.786,7	2.776,3

Sektoral	Index	Penutupan	1 year return	1 day return	YTD return
Technology	6,492	-28.9%	-1.2%	-27.8%	
Financials	1,501	-3.6%	0.2%	-1.7%	
Healthcare	1,486	3.8%	0.8%	4.6%	
Basic Material	1,291	3.2%	0.2%	4.6%	
Transportation & Log	1,810	44.8%	0.0%	13.2%	
Industrials	1,233	13.5%	0.3%	18.9%	
Infrastructure	912	-8.7%	0.3%	-4.9%	
Property	711	-15.0%	2.0%	-8.0%	
Energy	2,072	95.2%	-0.7%	81.9%	
Consumer Cyclical	890	2.5%	0.2%	-1.1%	
Consumer Non-Cyclical	733	4.6%	0.4%	10.4%	

Indeks Saham					
Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	7,081	5.7%	0.4%	7.6%
FSSTI	Singapura	3,253	1.0%	-0.1%	4.1%
KLCI	Malaysia	1,502	-1.0%	4.0%	-4.2%
SET	Thailand	1,625	-1.4%	0.0%	-2.0%
KOSPI	Korsel	2,441	-18.1%	1.0%	-18.1%
SENSEX	India	62,273	5.9%	1.2%	6.9%
HSI	Hongkong	17,661	-28.6%	0.8%	-24.5%
NKY	Jepang	28,383	-3.8%	1.0%	-1.7%
AS30	Australia	7,432	-3.9%	0.1%	-4.3%
IBOV	Brasil	111,831	7.0%	2.7%	6.7%
DJI	Amerika	34,194	-4.5%	0.3%	-5.9%
SKSP	Eropa	3,766	0.5%	0.2%	-1.4%
UKX	Ingggris	7,467	2.1%	0.0%	1.1%

Dual Listing (US\$)					
		Closing US\$	IDR	+/-	Daily % chg
TLKM		25.26	1,981.4	-0.23	-0.90%
TINS		0.071	1,117.8	-0.02	-24.31%
*Rp/US\$		15,688			

Suku Bunga & Inflasi			
Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	3.67%		
Kredit Bank IDR	12.73%		
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	78.1	-0.4%	0.2	0.21%
CPO RM/ ton	3,989.0	-25.4%	-47.0	-1.16%
Nikel US\$/ ton	25,986	23.5%	-168.3	-0.64%
Timah US\$/ ton	22,282	-45.8%	227.0	1.03%
Emas US\$/tr. oz	1,753.5	-2.0%	-1.8	-0.10%
Batu Bara US\$/ ton	347.4	118.5%	0.9	0.26%
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	8,003.0	-19.1%	40.8	0.51%

Sumber: Bloomberg

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
UNIC	10.700	525	BYAN	91.450	1.550
GGRM	21.450	450	ITMG	40.925	725
GHON	2.200	220	NFCX	8.650	650
TCPI	9.825	200	MCAS	7.500	325
LPPF	4.980	180	TECH	3.360	250

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