

# Evening Update

29 November 2022

## Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan bergerak bervariasi dan akhirnya ditutup di zona merah. Melemahnya indeks di bursa Wall Street seiring kekhawatiran investor terhadap potensi perlambatan ekonomi di China dan terganggunya produksi produk Apple menjadi sentimen negatif yang menekan indeks. Sementara itu naiknya mayoritas harga komoditas seperti minyak, CPO, nikel, dan batubara berhasil menjadi sentimen positif yang sempat membawa indeks ke zona hijau.

**IHSG ditutup melemah -5 poin (-0,08%)** pada level **7.012**. Sektor teknologi dan sektor keuangan yang terkoreksi -174 poin (-2,83%) dan -3 poin (-0,19%) menjadi kontributor terbesar bagi pelemahan indeks harga saham gabungan hari ini.

**Nilai tukar rupiah terhadap dolar Amerika melemah -21 poin (-0,13%)** pada level **Rp15.743**.

Items	Avg 2021	Terakhir	H-1
Nilai transaksi (Rp miliar)	18,002.4	18,678.5	15,834.8
Volume transaksi (jt shm)	11,667.8	10,912.2	8,843.2
Net asing (Rp miliar)	155.6	428.1	-1.1
Net asing (jt shm)	-185.2	168.4	-284.1
Kapitalisasi pasar (Rp tn)	6,977.9	2,761.9	2,776.0

Index	Penutupan	1 year return	1 day return	YTD return
Technology	6,179	-31.7%	-3.8%	-31.3%
Financials	1,485	-3.6%	-0.6%	-2.7%
Healthcare	1,495	3.0%	0.9%	5.3%
Basic Material	1,273	4.9%	-1.0%	3.2%
Transportation & Log	1,780	46.6%	-1.0%	11.3%
Industrials	1,235	17.4%	0.1%	19.1%
Infrastructure	896	-10.3%	-1.3%	-6.6%
Property	710	-12.9%	0.2%	-8.1%
Energy	2,038	96.8%	-0.4%	78.8%
Consumer Cyclical	890	5.7%	0.0%	-1.1%
Consumer Non-Cyclical	738	7.8%	0.6%	11.1%

Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	7,017	6.2%	-0.5%	6.6%
FSSTI	Singapura	3,240	3.8%	-0.1%	3.7%
KLCI	Malaysia	1,487	-1.7%	-1.0%	-5.2%
SET	Thailand	1,617	1.7%	-0.2%	-2.5%
KOSPI	Korsel	2,408	-17.2%	-1.2%	-18.9%
SENSEX	India	62,505	9.2%	0.3%	7.3%
HSI	Hongkong	17,298	-27.5%	-1.6%	-26.1%
NKY	Jepang	28,163	-0.4%	-0.4%	-3.0%
AS30	Australia	7,419	-1.9%	-0.4%	-4.7%
IBOV	Brasil	108,782	6.4%	-0.2%	3.8%
DJI	Amerika	33,849	-3.0%	-1.4%	-6.8%
SXSP	Eropa	3,763	3.8%	-0.2%	-1.5%
UKX	Inqgris	7,474	5.1%	-0.2%	1.2%

Dual Listing (US\$)	Closing US\$	IDR	+/-	Daily % chg
TLKM	25.04	1,962.3	-0.51	-2.00%
TINS	0.070	1,102.6	0.00	0.00%
*Rp/US\$	15,673			

Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bin	3.68%		
Kredit Bank IDR	12.78%		
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	-0.08%	3.70%	-3.78%

Harga Komoditas	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
Minyak WTI US\$/ bbl	77.2	10.4%	1.0	1.26%
CPO RM/ ton	4,060.0	-23.9%	71.0	1.78%
Nikel US\$/ ton	25,512	27.1%	208.0	0.82%
Timah US\$/ ton	22,458	-43.3%	170.0	0.76%
Emas US\$/tr. oz	1,741.8	-2.4%	0.4	0.02%
Batu Bara US\$/ ton	379.0	140.6%	18.2	5.04%
Gandum US\$/bushel	7.76	-6.1%	-0.2	-2.27%
Jagung US\$/bushel	6.68	13.8%	0.0	0.72%
Kedelai US\$/bushel	14.36	14.6%	0.0	0.02%
Tembaga US\$/ton	7,935.3	-17.1%	-39.8	-0.50%

Sumber: Bloomberg

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
UNTR	30.700	950	BYAN	92.350	800
ITMG	41.850	800	GGRM	21.450	250
TCPI	10.750	475	PTSP	3.340	240
MCAS	8.250	450	ASII	6.050	175
MAPA	4.240	260	CITA	3.000	170

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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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