

Evening Update

1 February 2023

Indonesia Market Wrap

Pada perdagangan hari ini indeks harga saham gabungan konsisten bergerak di zona hijau dipicu oleh sentimen positif dari rilis data inflasi yang lebih rendah dari konsensus di level 5,28% vs 5,40% yoy serta 0,34% vs 0,45% mom. Sementara itu menguatnya indeks di bursa Wall Street dan naiknya harga komoditas nikel dan emas turut menjadi sentimen positif tambahan bagi pergerakan indeks.

IHSG ditutup menguat +23 poin (+0,34%) pada level **6.862**. Sektor transportasi dan sektor barang konsumen non primer yang mengalami kenaikan +33 poin (+1,86%) dan +10 poin (+1,27%) menjadi kontributor terbesar bagi kenaikan indeks harga saham gabungan hari ini.

Nilai tukar rupiah terhadap dolar Amerika menguat +15 poin (+0,10%) pada level **Rp14.975**.

Items	Avg 2022	Terakhir	H-1
Nilai transaksi (Rp miliar)	20.648.7	15.093.2	13.406.8
Volume transaksi (jt shm)	12.270.2	10.684.9	8.681.8
Net asing (Rp miliar)	246.2	-672.0	276.6
Net asing (jt shm)	-246.6	-78.7	1.356.5
Kapitalisasi pasar (Rp tn)	3.289.6	2.640.9	2.653.7

Index	Penutupan	1 year return	1 day return	YTD return
Technology	5,482	-30.5%	0.4%	6.2%
Financials	1,413	-9.4%	-0.3%	-0.1%
Healthcare	1,546	6.5%	-1.1%	-1.2%
Basic Material	1,259	3.3%	0.1%	3.5%
Transportation & Log	1,756	44.1%	-0.8%	5.6%
Industrials	1,171	13.4%	-0.1%	-0.3%
Infrastructure	852	-7.3%	0.3%	-1.9%
Property	707	-0.7%	0.3%	-0.6%
Energy	2,171	67.7%	0.8%	-4.7%
Consumer Cyclical	821	-7.3%	-0.8%	-3.5%
Consumer Non-Cyclical	739	12.4%	0.2%	3.1%

Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	6,839	3.1%	-0.5%	-0.2%
FSSTI	Singapura	3,366	3.6%	-0.4%	3.5%
KLCI	Malaysia	1,486	-1.8%	-0.9%	-0.7%
SET	Thailand	1,671	0.6%	-0.6%	0.2%
KOSPI	Korsel	2,425	-8.9%	-1.0%	9.4%
SENSEX	India	59,550	1.2%	0.1%	-2.1%
HSI	Hongkong	21,842	-8.2%	-1.0%	10.4%
NKY	Jepang	27,327	0.9%	-0.4%	5.4%
AS30	Australia	7,686	5.1%	-0.2%	7.0%
IBOV	Brasil	113,431	1.1%	1.0%	3.4%
DJI	Amerika	34,086	-3.0%	1.1%	2.8%
SXSP	Eropa	3,853	1.4%	-0.2%	5.5%
UKX	Inqgris	7,772	3.1%	-0.2%	4.3%

Dual Listing (US\$)	Closing US\$	IDR	+/-	Daily % chg
TLKM	26.02	1,947.6	-0.48	-1.81%
TINS	0.095	1,414.8	0.02	30.83%
*Rp/US\$	14,970			

Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	3.92%		
Kredit Bank IDR	13.15%		
BI 7-Days RR	5.75%	5.51%	0.24%
Fed Funds Target	4.50%	6.50%	-2.00%
ECB Main Refinancing	250.00%	9.20%	240.80%
Domestic Yen Interest Call	-0.01%	4.00%	-4.01%

Harga Komoditas	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
Minyak WTI US\$/ bbl	78.9	-10.6%	1.0	1.25%
CPO RM/ ton	3,720.0	-35.7%	-130.0	-3.38%
Nikel US\$/ ton	30,153	32.0%	1,135.7	3.91%
Timah US\$/ ton	29,431	-32.4%	-346.0	-1.16%
Emas US\$/tr. oz	1,928.4	7.1%	5.2	0.27%
Batu Bara US\$/ ton	251.8	13.0%	-13.6	-5.13%
Gandum US\$/bushel	7.61	0.0%	0.1	1.16%
Jagung US\$/bushel	6.80	8.6%	0.0	-0.59%
Kedelai US\$/bushel	15.38	3.2%	0.0	0.18%
Tembaga US\$/ton	9,199.6	-4.0%	11.2	0.12%

Sumber: Bloomberg

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
GGRM	24.000	1.000	MKPI	35.150	750
MREI	5.700	710	ITMG	35.500	700
MIDI	3.880	330	FASW	5.900	350
ICBP	10.375	275	BMRI	9.700	250
LPPF	4.600	210	BYAN	19.875	225

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