

# Morning Update

Items	Avg 2016	Terakhir	H-1
Nilai transaksi (Rp miliar)	5,296.5	8,110.0	4,574.4
Volume transaksi (jt shm)	4,957.8	10,684.1	6,727.9
Net asing (Rp miliar)	65.7	662.3	-631.4
Net asing (jt shm)	-150.6	-204.6	-6.1
Kapitalisasi pasar (Rp tn)	5,376.3	4,837.4	4,390.0

Index	Penutupan	1 year return	1 day return	YTD return
Agri	918	-37.6%	10.8%	-39.8%
Basic Industry	551	-39.2%	8.6%	-43.7%
Consumer	1,566	-40.0%	13.0%	-23.7%
Finance	957	-23.4%	13.0%	-29.4%
Infrastructure	768	-33.8%	11.4%	-32.5%
Misc. Industry	688	-45.4%	8.0%	-43.8%
Mining	1,172	-36.9%	6.4%	-24.3%
Property	318	-31.5%	3.3%	-36.9%
Trade	570	-30.7%	3.6%	-26.0%

Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	4,339	-32.7%	10.2%	-31.1%
FSSTI	Singapura	2,549	-20.3%	2.5%	-20.9%
KLCI	Malaysia	1,347	-18.0%	1.4%	-15.2%
SET	Thailand	1,092	-33.0%	1.1%	-30.9%
KOSPI	Korsel	1,686	-21.4%	-1.1%	-21.5%
SENSEX	India	29,947	-21.5%	4.9%	-27.4%
HSI	Hongkong	23,352	-18.7%	-0.7%	-17.2%
NKY	Jepang	18,665	-12.7%	-4.5%	-19.3%
AS30	Australia	5,135	-17.4%	2.6%	-24.8%
IBOV	Brasil	77,710	-15.4%	3.7%	-32.8%
DJI	Amerika	22,552	-12.0%	6.4%	-21.0%
SX5P	Eropa	2,726	-12.0%	2.1%	-19.9%
UKX	Ingggris	5,816	-19.2%	2.2%	-22.9%

Dual Listing (US\$)	Closing US\$	IDR	+/-	Daily % chg
TLKM	18.72	1,526.1	1.71	10.05%
TINS	0.036	594.5	0.03	230.00%
*Rp/US\$	16,305			

Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	5.60		
Kredit Bank IDR	12.66		
BI 7-Days RR	4.50%	2.98%	0.02
Fed Funds Target	0.25	2.30%	0.23
ECB Main Refinancing	-	1.20%	(0.01)
Domestic Yen Interest	(0.02)	0.40%	(0.02)

dim US\$	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
(in USD)				
Minyak WTI / bbl	22.6	-62.0%	-1.9	-7.72%
CPO/ ton	547.8	10.6%	-6.0	-1.09%
Nikel/ ton	11,147	-14.2%	-71.0	-0.63%
Timah/ ton	14,318	-32.9%	-56.0	-0.39%
Emas/tr. oz	1,631.3	24.6%	14.4	0.89%
Batu Bara/ ton	66.5	-28.6%	0.2	0.23%
Tepung Terigu/ ton	146.5	-7.0%	8.1	5.84%
Jagung/bushel	3.3	-6.0%	0.0	0.00%
Kedelai	8.6	0.8%	0.0	-0.20%
Tembaga	4,788.8	-24.4%	-57.4	-1.18%

Sumber: Bloomberg

## Global Market Wrap

Pada perdagangan kemarin indeks di bursa Wall Street kembali ditutup menguat signifikan meskipun data klaim pengangguran mengalami lonjakan tajam. Disetujuinya paket stimulus fiskal senilai US\$ 2 triliun oleh Senat untuk mengurangi dampak negatif penyebaran pandemi Covid-19 terhadap ekonomi masih menjadi sentimen positif utama di pasar. Pada minggu lalu jumlah klaim pengangguran mencapai 3.28 juta orang, jumlah tersebut melewati jumlah klaim pengangguran pada masa depresi besar dan level tertinggi di tahun 1982 yang masing-masing tercatat sebanyak 665,000 dan 695,000. Meskipun begitu angka klaim pengangguran mingguan tersebut masih lebih rendah dari ekspektasi pasar yang berada di level 4 jutaan. Dow Jones membukukan kenaikan +1,352 poin (+6.38%) ditutup pada level 22,552, S&P500 menguat +155 poin (+6.24%) ditutup pada level 2,630, dan Nasdaq bertambah +413 poin (+5.60%) ditutup pada level 7,798. Sementara itu EIDO mencatatkan kenaikan +1.93 poin (+14.60%) ditutup pada level 15,15. Pagi ini indeks di bursa asia dibuka menguat sedangkan nilai tukar rupiah terhadap dolar Amerika dibuka menguat +167 poin (+1.03%) pada level Rp16,137.

## Technical Ideas

Menguatnya indeks bursa global dan regional seiring dengan disetujuinya paket stimulus fiskal senilai US\$ 2 triliun diprediksi masih akan menjadi sentimen positif di pasar. Sementara itu menguatnya nilai tukar rupiah akan menjadi tambahan sentimen positif di pasar. IHSG diprediksi akan melanjutkan penguatannya dengan support di level 4,080 dan resistance di level 4,630.

### Stocks

- BBKA (Buy, Support: Rp25,500, Resist: Rp27,700)
- INDF (Buy, Support: Rp5,775, Resist: Rp6,250)
- SMGR (Buy, Support: Rp6,575, Resist: Rp7,475)
- UNVR (Buy, Support: Rp5,825, Resist: Rp7,725)

### ETFs

- XISR (Buy, Support: Rp238, Resist: Rp309)
- XIIF (Buy, Support: Rp338, Resist: Rp401)
- XPLC (Buy, Support: Rp282, Resist: Rp362)

## News Highlight

**PT Media Nusantara Citra Tbk (MNCN)** optimistis kinerja perseroan akan terkerek di tengah pandemi Covid-19 seiring tren berkegiatan dari rumah. Perseroan menaungi sejumlah media mainstream besar seperti RCTI, MNC TV, dan Global TV.

Perseroan menyebutkan hingga saat ini belanja iklan untuk FTA dan layanan *streaming* masih berjalan dengan sangat baik. Di sisi lain, perseroan diketahui telah meningkatkan tarif iklan FTA TV-nya, baik pada *non-prime time* dan *prime time* sebesar 10 persen pada Januari 2020.

INDOPREMIER

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#### INVESTMENT RATINGS

BUY : Expected total return of 10% or more within a 12-month period  
HOLD : Expected total return between -10% and 10% within a 12-month period  
SELL : Expected total return of -10% or worse within a 12-month period

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