

# Evening Update

30 July 2020

Items	Avg 2016	Terakhir	H-1
Nilai transaksi (Rp miliar)	5,296.5	8,855.5	9,137.9
Volume transaksi (jt shm)	4,957.8	6,772.2	6,871.9
Net asing (Rp miliar)	65.7	-433.9	-295.4
Net asing (jt shm)	-150.6	-310.3	-247.9
Kapitalisasi pasar (Rp tn)	5,376.3	5,698.3	5,700.4

  

Sektoral				
Index	Penutupan	1 year return	1 day return	YTD return
Agri	1,155	-14.5%	1.8%	-24.2%
Basic Industry	752	-8.8%	0.1%	-23.2%
Consumer	1,872	-19.4%	1.5%	-8.8%
Finance	1,120	-15.4%	-0.7%	-17.4%
Infrastructure	898	-25.6%	0.1%	-21.1%
Misc. Industry	913	-28.5%	-1.3%	-25.4%
Mining	1,372	-16.5%	0.3%	-11.4%
Property	300	-40.5%	-1.3%	-40.5%
Trade	623	-23.3%	-0.1%	-19.0%

  

Indeks Saham					
Index	Negara	Penutupan	1 year return	1 day return	YTD return
JCI	Indonesia	5,111	-19.9%	0.0%	-18.9%
FSSTI	Singapura	2,573	-23.2%	-0.4%	-20.1%
KLCI	Malaysia	1,611	-1.9%	0.1%	1.4%
SET	Thailand	1,338	-21.6%	-0.2%	-15.3%
KOSPI	Korsel	2,263	-11.0%	0.3%	-11.4%
SENSEX	India	38,071	1.8%	-1.1%	-7.7%
HSI	Hongkong	24,883	-11.6%	0.4%	-11.7%
NIKY	Jepang	22,397	3.2%	-1.1%	-5.1%
AS30	Australia	6,128	-11.6%	-0.3%	-9.3%
IBOV	Brasil	105,605	2.6%	1.4%	-8.7%
DJI	Amerika	26,540	-2.4%	0.6%	-7.0%
SX5P	Eropa	3,011	-5.3%	-0.2%	-11.5%
UKX	Inggris	6,131	-19.8%	0.0%	-18.7%

  

Dual Listing (US\$)				
	Closing US\$	IDR	+/-	Daily % chg
TLKM	20.57	1,494.9	0.09	0.44%
TINS	0.042	616.0	0.00	9.09%
*Rp/US\$	14,535			

  

Suku Bunga & Inflasi			
Items	Latest Interest	Inflation	Real interest rate
Deposito IDR 3 bln	5.31%		
Kredit Bank IDR	12.31%		
BI 7-Days RR	4.00%	1.96%	2.04%
Fed Funds Target	0.25%	0.60%	-0.35%
ECB Main Refinancing	0.00%	0.30%	-0.30%
Domestic Yen Interest Call	-0.02%	0.10%	-0.12%

  

Harga Komoditas				
dIm US\$	Penutupan	Ret 1 year (%)	+/-	Ret 1 day (%)
(in USD)				
Minyak WTI / bbl	41.3	-28.9%	0.2	0.56%
CPO/ ton	623.7	28.3%	9.9	1.61%
Nikel/ ton	13,829	-3.5%	219.0	1.61%
Timah/ ton	17,962	2.0%	-81.5	-0.45%
Emas/tr. oz	1,970.8	37.7%	12.4	0.63%
Batu Bara/ ton	51.8	-27.7%	0.0	0.00%
Tepung Terigu/ ton	146.5	-7.0%	8.1	5.84%
Jaquung/bushel	3.1	-22.6%	0.1	3.32%
Kedelai	8.9	2.9%	0.0	0.15%
Tembaga	6,482.0	8.0%	-8.0	-0.12%

Sumber: Bloomberg

## Indonesia Market Wrap

Indeks harga saham gabungan sempat bergerak di teritori negatif namun kemudian berbalik arah dan bertahan hingga akhir perdagangan. Keputusan The Fed untuk mempertahankan suku bunga acuan di kisaran nol persen dan komitmen untuk terus membantu proses pemulihan ekonomi serta naiknya sebagian besar harga komoditas berhasil menjadi sentimen positif di pasar. Sementara itu mulai dirilisnya beberapa laporan keuangan emiten di kuartal du juga turut menambah sentimen positif di pasar.

**IHSG ditutup menguat +39 poin (+0.75%)** pada level **5,150**. Sektor keuangan dan aneka industri yang masing-masing membukukan kenaikan +15 poin (+1.37%) dan +9 poin (+0.94%) menjadi penyumbang terbesar bagi penguatan indeks harga saham gabungan hari ini. Sementara itu investor asing membukukan pembelian bersih (*foreign net buy*) sebesar Rp103,4 miliar di pasar reguler.

**Nilai tukar rupiah** terhadap dolar Amerika diperdagangkan melemah -58 poin (-0.40%) ditutup pada level **Rp14,600**.

Top Gainer			Top Loser		
Ticker	Last (Rp)	Change(+)	Ticker	Last (Rp)	Change(-)
BBCA	31,200	525	TGKA	7,275	525
GGRM	4,000	350	MREI	4,100	290
RDTX	49,975	325	TCID	6,725	275
SMMA	5,350	300	SMGR	9,225	250
LIFE	17,200	300	UNIC	3,700	240

Source: IPOT

Top Foreign Buy			Top Foreign Sell		
Ticker	NBVal (B)	NBLot	Ticker	NSVal (B)	NSLot
BBCA	160	51,370	TOWR	60	531,468
UNVR	105	125,390	MNCN	48	588,749
TLKM	60	197,929	BBTN	48	374,135
BBRI	59	188,344	TKIM	29	41,858
PGAS	41	322,459	MDKA	27	151,857

Source: IPOT

### 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

### ANALYSTS CERTIFICATION

The views expressed in this research report accurately reflect the analyst's personal views about any and all of the subject securities or issuers; and no part of the research analyst's compensation was, is, or will be, directly or indirectly, related to the specific recommendations or views expressed in the report.

### DISCLAIMERS

This research is based on information obtained from sources believed to be reliable, but we do not make any representation or warranty nor accept any responsibility or liability as to its accuracy, completeness or correctness. Opinions expressed are subject to change without notice. This document is prepared for general circulation. Any recommendations contained in this document does not have regard to the specific investment objectives, financial situation and the particular needs of any specific addressee. This document is not and should not be construed as an offer or a solicitation of an offer to purchase or subscribe or sell any securities. PT. Indo Premier Sekuritas or its affiliates may seek or will seek investment banking or other business relationships with the companies in this report.

**Refer to Important disclosures on the last of this report**