

ANALISA SAHAM INDONESIA

SEPTEMBER 10, 2019

- * THE JCI TRADING RANGE 6,310PT - 6,375PT (YESTERDAY CLOSE: 6,326PT)
- * WALL STREET WAS STABLE, BACKED BY OPTIMISM ON TRADE RE-NEGOTIATION NEXT MONTH
- * STAY TRADING ON THE JCIs, CHECK OUT OUR SELECTED ONES_ THEY ARE KEEPING UP

Morning,

The Jakarta Composite Index (JCI) today (10/9) is expected to be in the range of 6,310pt – 6,375pt on hope for trade negotiation in Washington DC next month will find a final deal for the United States (US) and China. The US Treasury Secretary stated that the two countries sealed a conceptual agreement on how to handle conflict points. The DJIA on yesterday session (9/9) ended higher by 38 points or 0.2% higher to 26.797pt, while the S&P 500 and the Nasdaq closed almost unchanged.

At the other end, WTI price ended higher by 2.4% to USD57.9/barrel on yesterday session, while the USDIDR appreciated to IDR14.092 vs. previously of IDR14.140. Both are expected to support the JCI.

We keep the following recommendations. These counters have been hit hard since the end of March this year and thus offer bargain opportunity both for trading and longer term investment purpose. **AALI, LSIP (sector of Agri, allocation suggestion Underweight), UNTR, ITMG, ADRO, PTBA (sector of Coal Mining, allocation suggestion Market-weight), GGRM, UNVR, ICBP (sector of Consumer, allocation suggestion Overweight), ASII (sector of Automative, allocation suggestion Market-weight), and ACES, SCMA, MAPI (sector of Trade, allocation suggestion Overweight), and TKIM (sector of Basic Industry, allocation suggestion Market-weight).**

Cheers,

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