

## ANALISA SAHAM INDONESIA

SEPTEMBER 20, 2019

- \* THE JCI TRADING RANGE : 6,190PT- 6,275PT(YESTERDAY CLOSE: 6,245PT)
- \* WALL STREET CLOSED FLAT AMIDS CONTRADICTING VIEWS ON PROSPECT OF TRADE DEAL WITH CHINA, ON RE-NEGOTIATIONS ON EARLY OCTOBER IN DC
- \* KEEP SAFELY-TRADE ON THE JCI COUNTERS, LIQUIDITY AND PRICES WILL SUPPORT

Morning,

The Jakarta Composite Index (JCI) today (20/9) is expected to be in the range of 6,190pt – 6,275pt being hold by liquidity and stable Wall Street close yesterday (19/9). With Bank Indonesia cut the BI7D-RR another 25bp, the third this year, to 5.25% in this month meeting, the JCI is expected to get support. Yesterday, the DJIA, S&P500, and the Nasdaq, all closed almost unchanged, down by 52 point for the Dow or 0.2% to 27.095pt.

At the other end, USDIDR closed stable at IDR14.099 yesterday vs. IDR14.080 previously. So was the WTI price, closed at USD58.1/barrel, barely changed from the previous one. Both are expected to provide support.

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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