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Indonesia Stock Exchange

Bursa Efek Indonesia

ASEAN Economic Community: Financing Growth



Poltak Hotradero

Head of Research and Development

Agenda

ASEAN General Overview

Financing ASEAN-5



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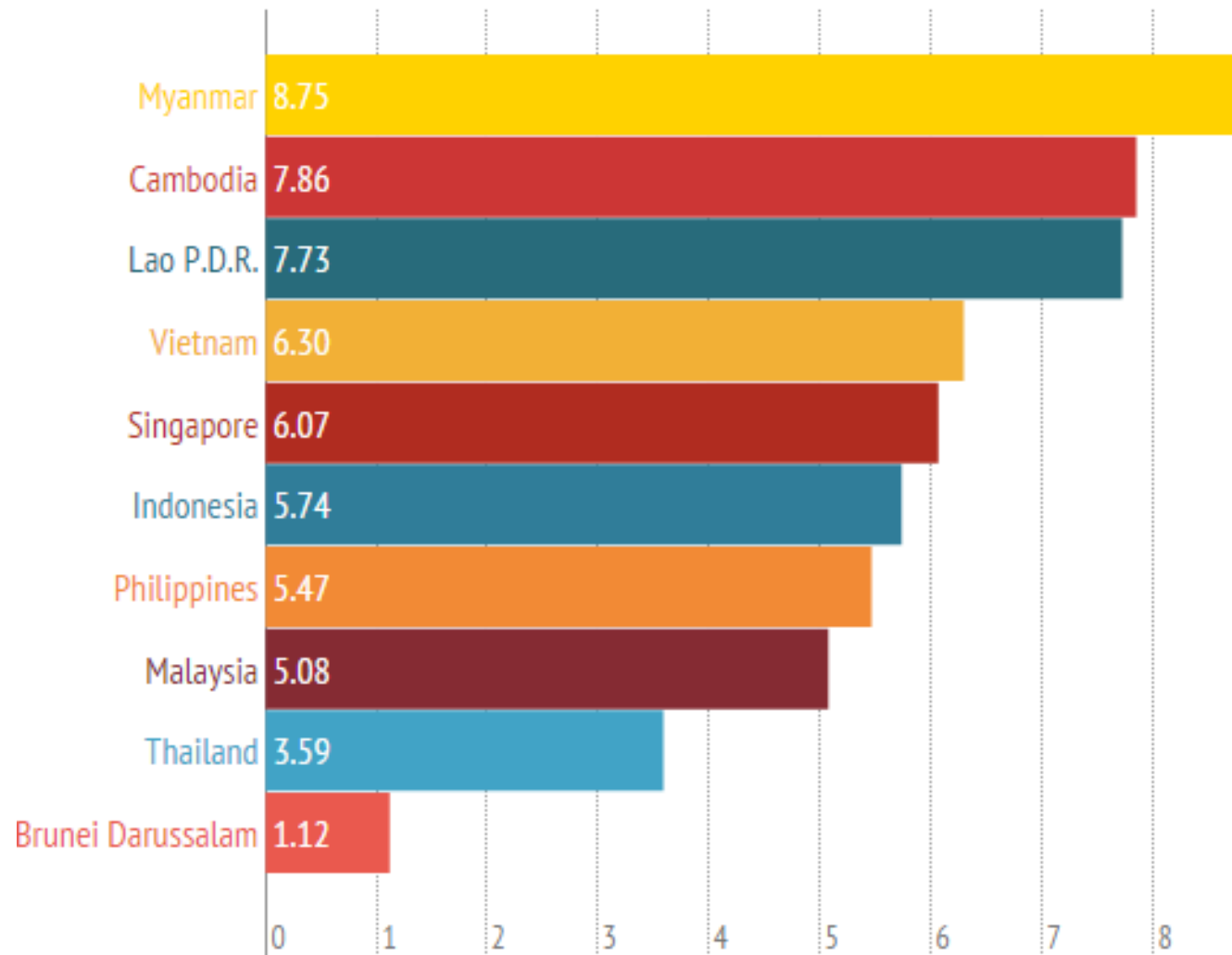
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ASEAN Overview

ASEAN Countries Real Economic Growth

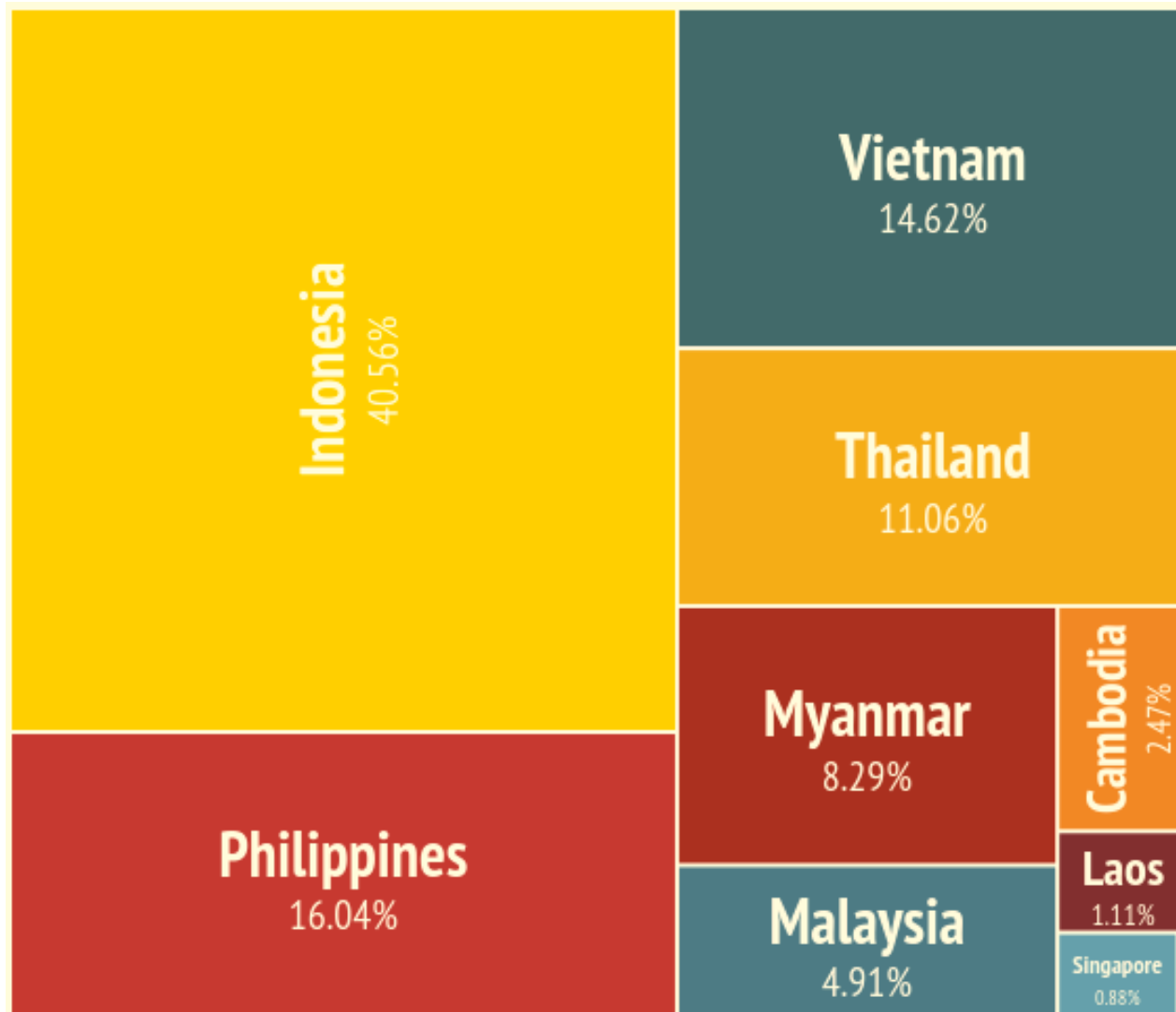
Average Growth 2004-2014



(Source: World Economic Outlook Database 2015 IMF)

ASEAN Countries in Population

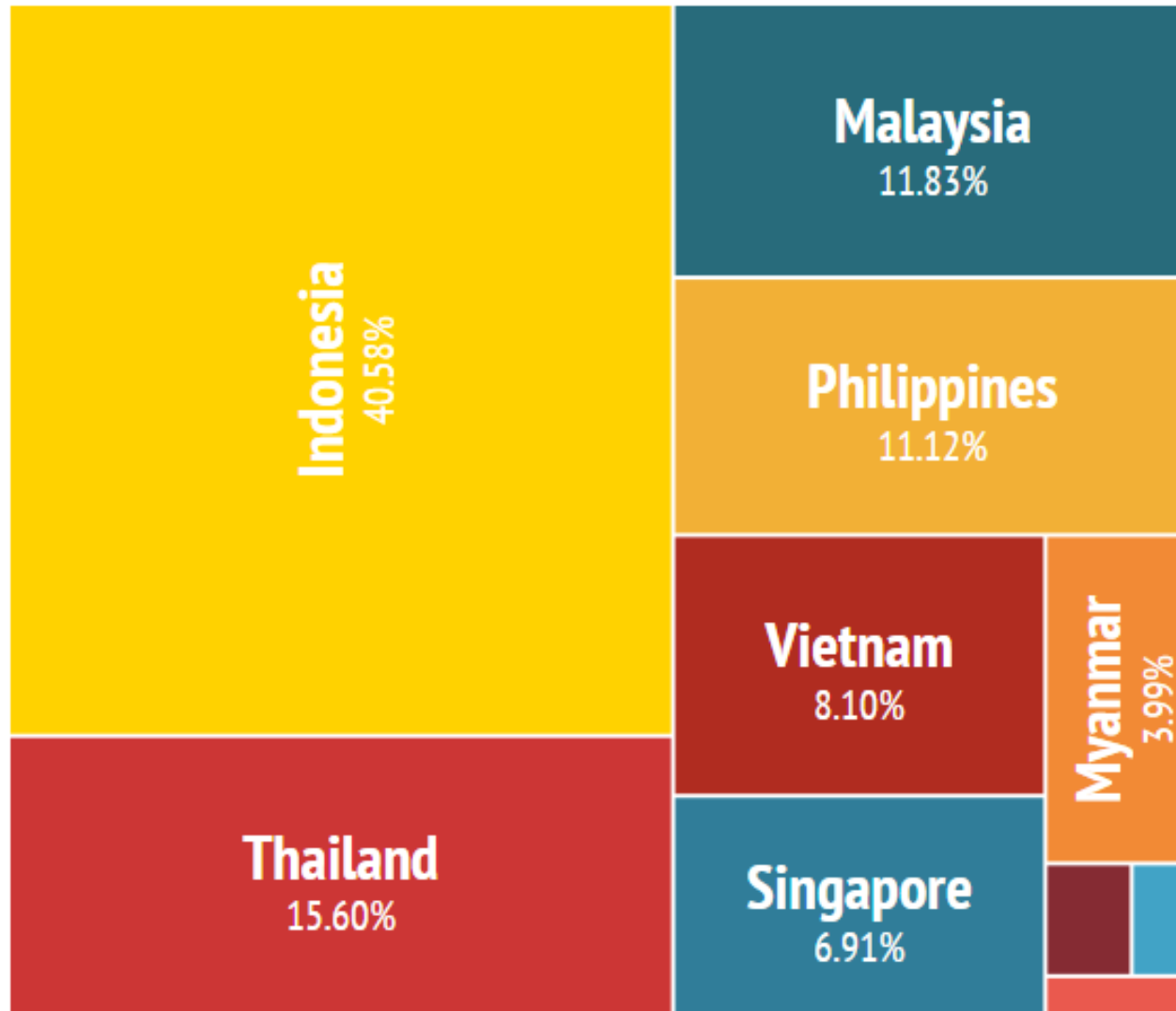
ASEAN Population: 620 Million people (2014)



(Source: World Economic Outlook Database 2015 IMF)

ASEAN Countries in GDP

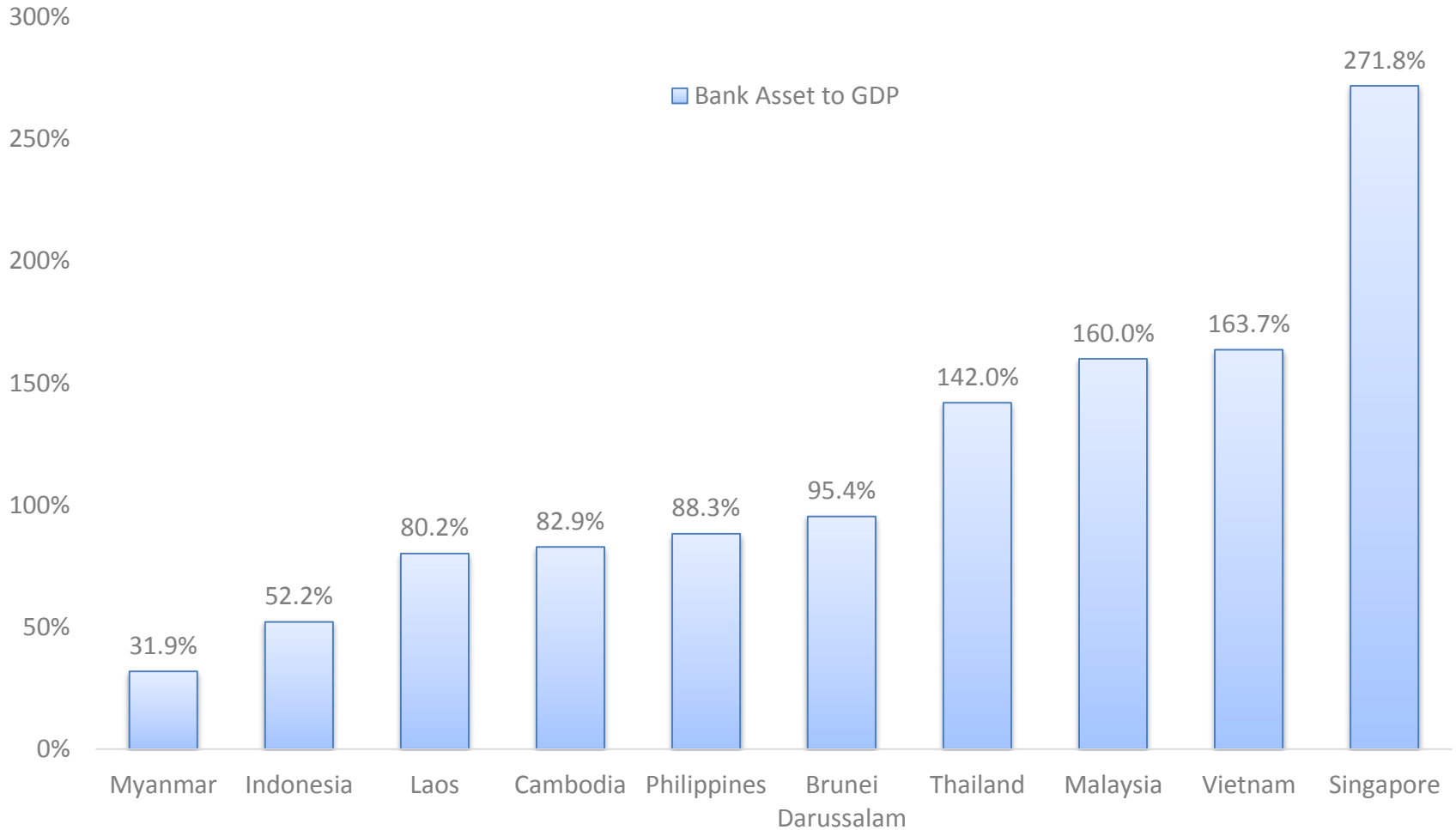
ASEAN GDP: \$ 6762 Billion in PPP (2014)



(Source: World Economic Outlook Database 2015 IMF)

Bank Asset to GDP

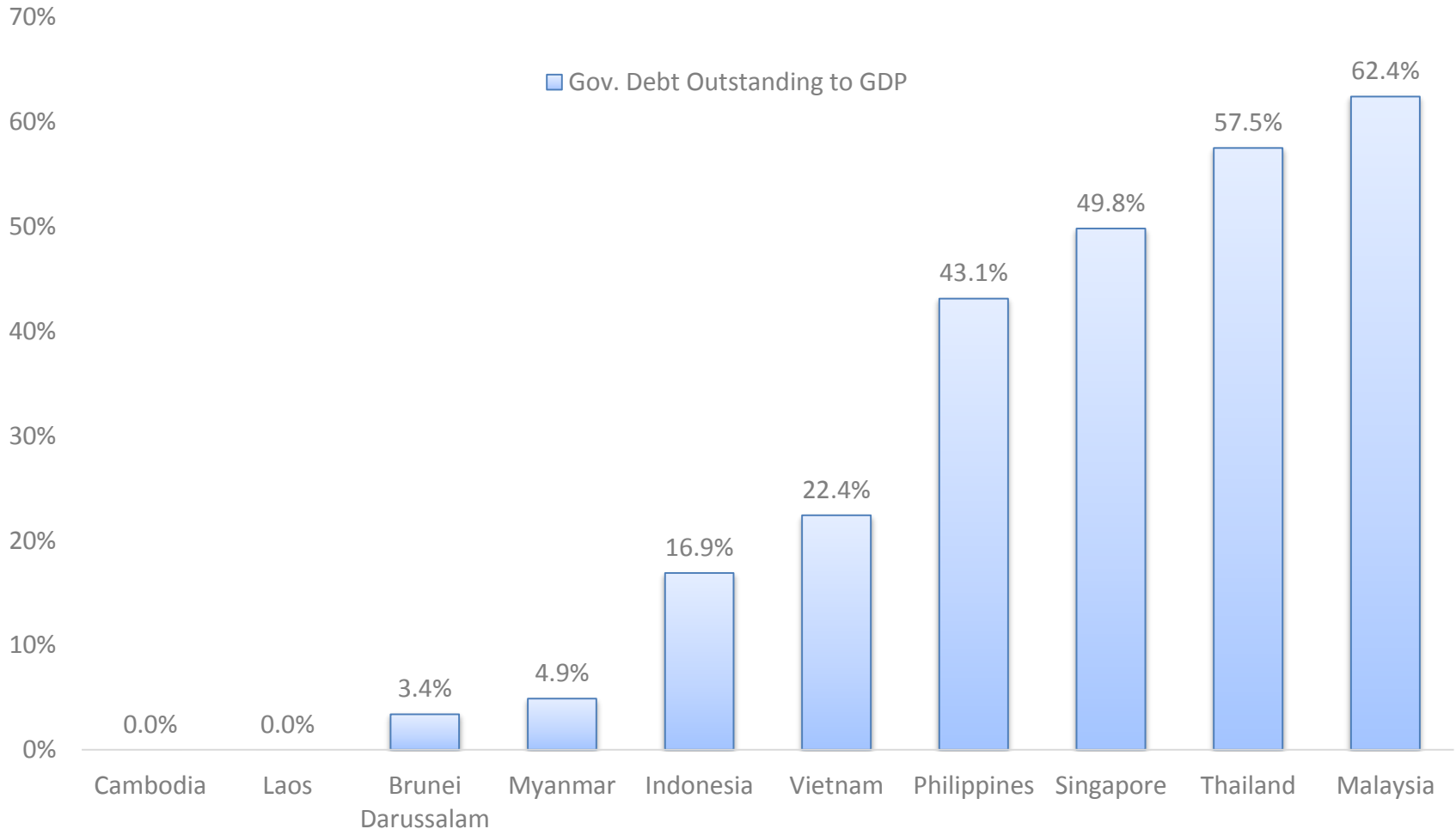
Mainstream Financing



(Source: Local Currency Bond and Infrastructure Finance in ASEAN+3, ADB, 2015)

Government Bond Outstanding to GDP

Sovereign Financing



(Source: Local Currency Bond and Infrastructure Finance in ASEAN+3, ADB, 2015)



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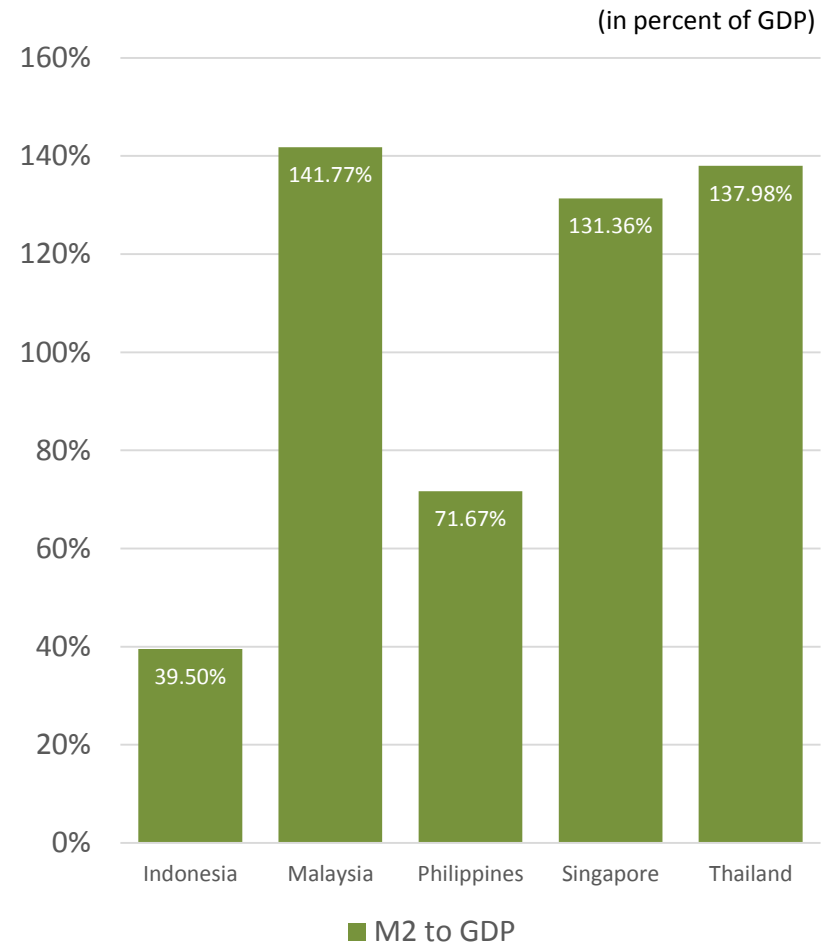
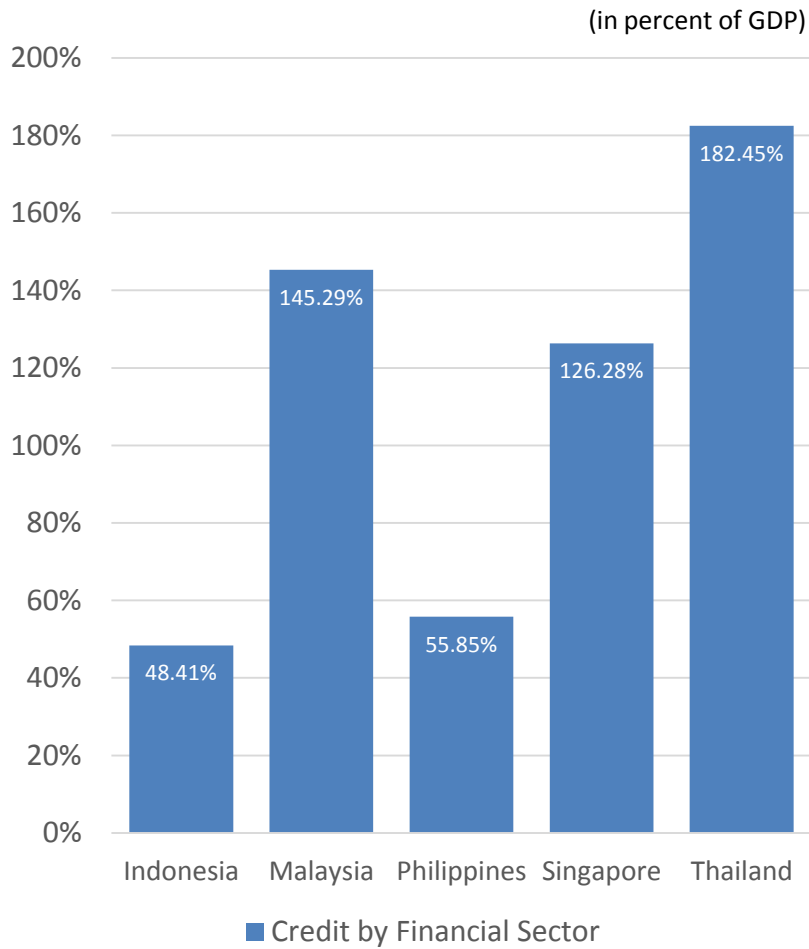
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Financing ASEAN-5

Credit to Private Sector and M2/GDP

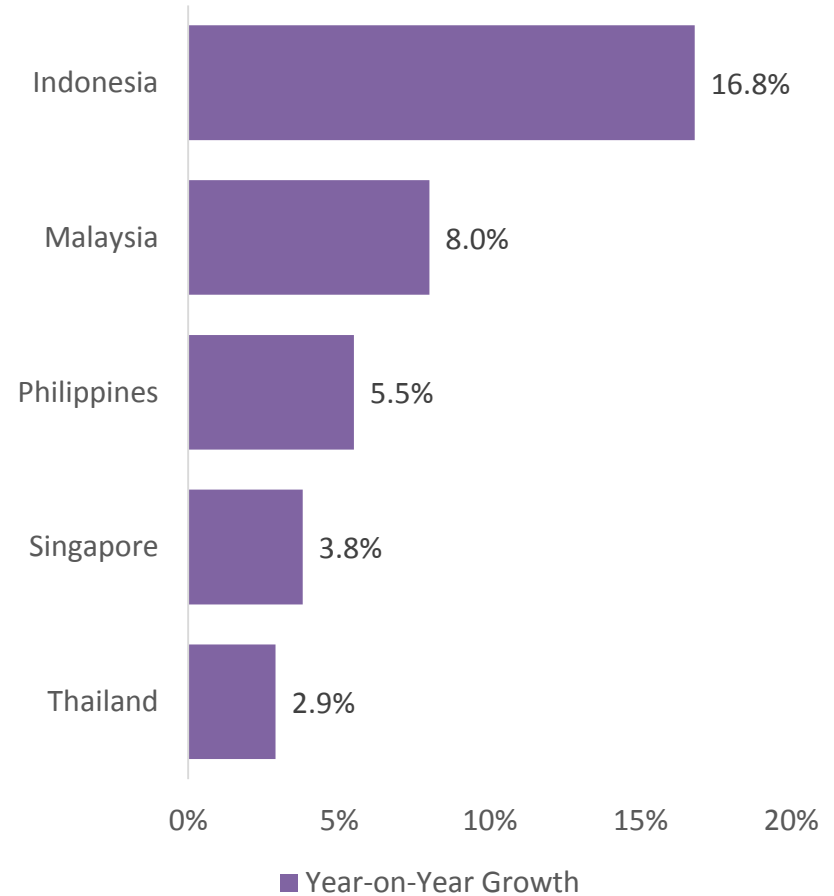
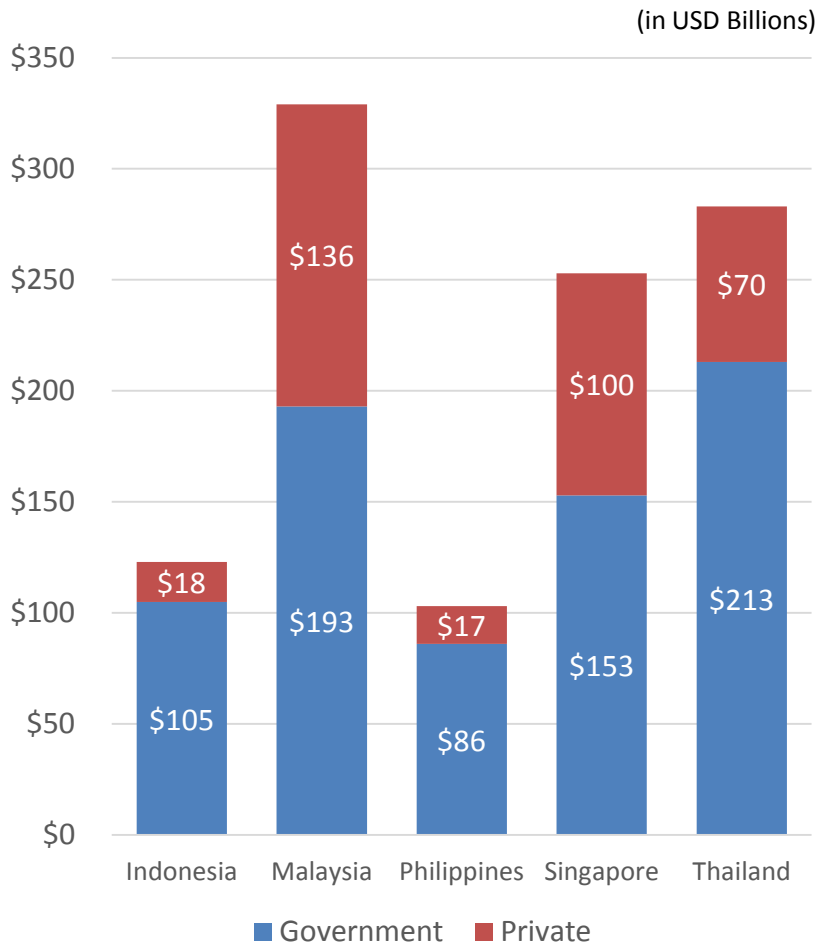
ASEAN-5 Differences



(Source: World Development Indicator, World Bank 2015)

ASEAN-5 Bond Market Volume

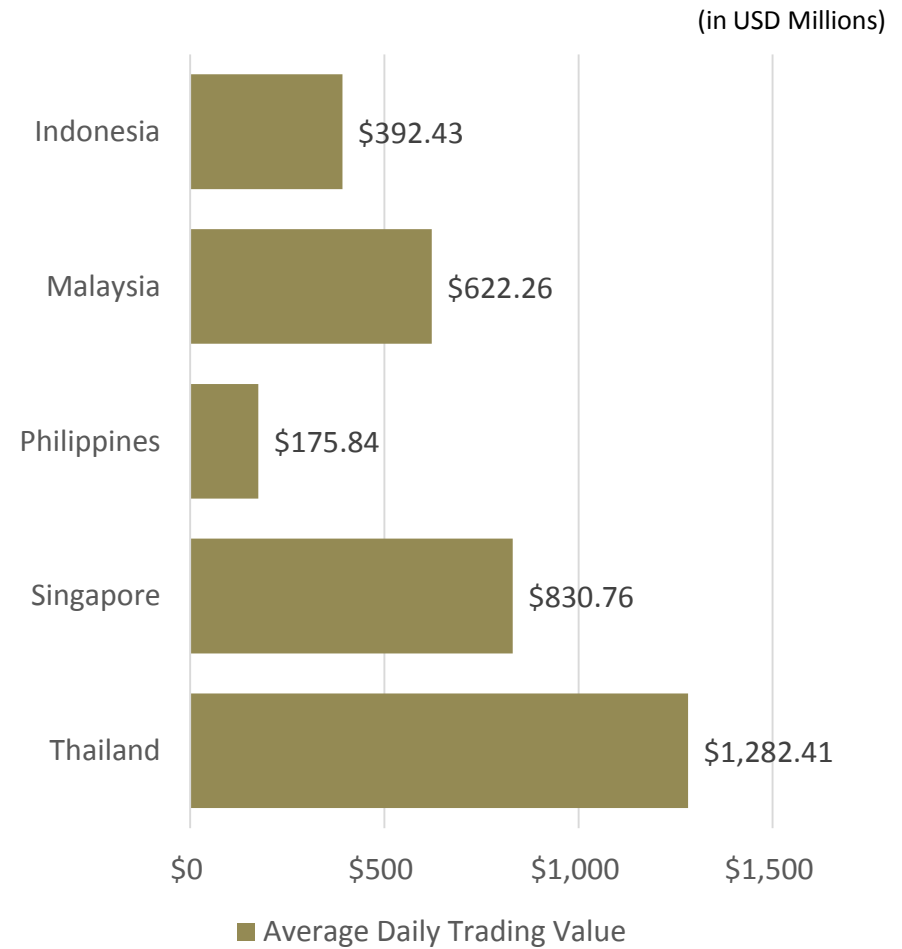
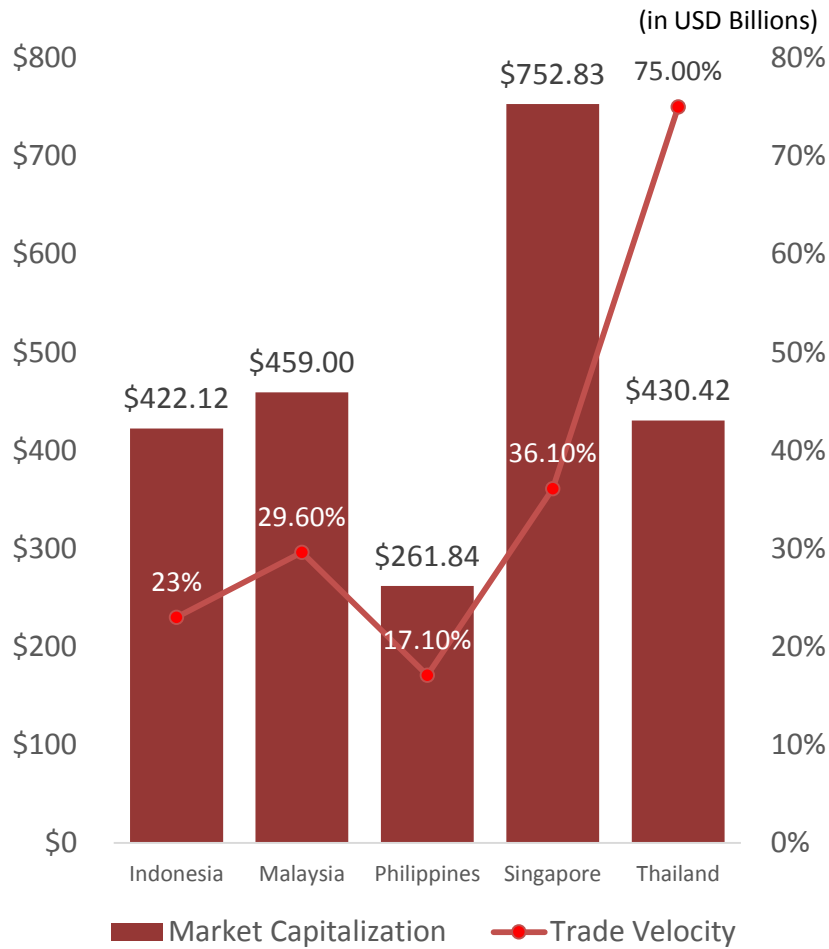
End of 2014 Position



(Source: asianbondsonline.adb.org)

ASEAN-5 Equity Market

End of 2014 Position



(Source: World Federation of Exchanges Statistics)

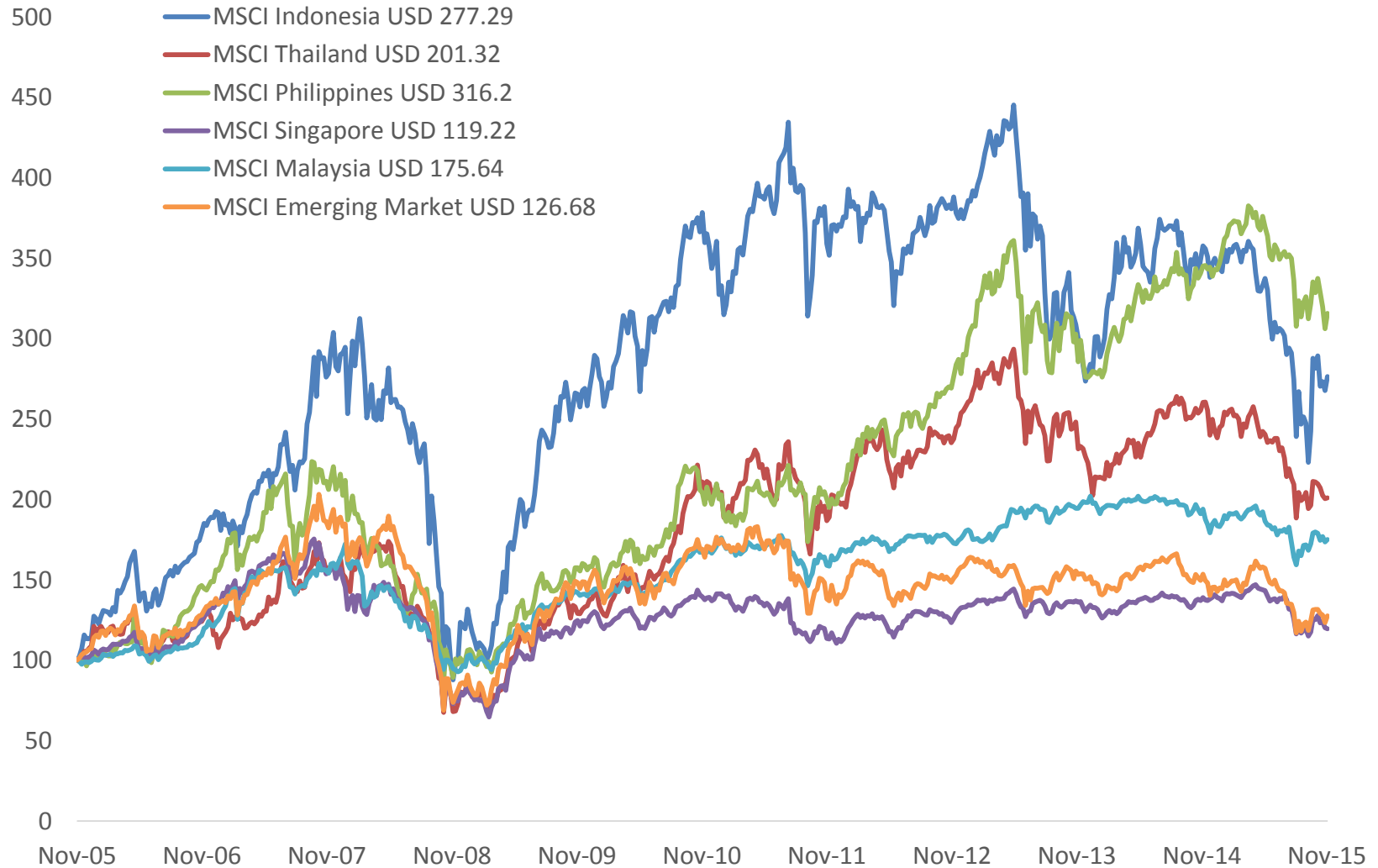
Mutual Fund Assets in Comparison

End of 2010 Position, By Country

Region	Population (Millions)	GDP (\$ Billion)	Assets (\$ Billion)	Asset per Capita (\$)	Assets as share of GDP (%)
China	1,355.2	5,708	347.6	256.5	6.1
Indonesia	232.8	707	18.7	80.3	2.6
South Korea	48.9	1,028	300.2	6,139.1	29.2
Malaysia	28.0	248	73.1	2,610.7	29.5
Philippines	93.8	200	5.7	60.8	2.9
Singapore	4.8	223	44.9	9,354.2	20.1
Thailand	68.2	319	87.7	1,285.9	27.5
United States	310.2	14,490	11,820.7	38,106.7	81.6
Japan	127.0	5,485	785.5	6,185.0	14.3

(Source: Asian Development Bank, 2013)

Blue Chip Stock Performance Among ASEAN-5



(Source: Thomson-Reuters, MSCI)

Global Equity Asset Allocation

Among Emerging Market Countries

Country	MSCI Emerging Market	MSCI AC Asia ex Japan
China	17.7%	25.0%
Brazil	16.0%	
Korea	13.5%	19.1%
Taiwan	11.5%	16.3%
South Africa	7.4%	
India	7.4%	10.4%
Russia	7.3%	
Mexico	4.5%	
Malaysia	2.9%	4.1%
Indonesia	2.3%	3.3%
Thailand	1.7%	2.4%
Poland	1.7%	

Country	MSCI Emerging Market	MSCI AC Asia ex Japan
Chile	1.5%	
Turkey	1.3%	
Colombia	0.8%	
Peru	0.6%	
Philippines	0.5%	0.7%
Hungary	0.4%	
Egypt	0.4%	
Czech Republic	0.4%	
Morocco	0.2%	
Hong Kong		11.8%
Singapore		6.9%
TOTAL	100%	100%

(Source: MSCI, 2014)

poltak.hottradero@idx.co.id

THANK YOU