

SYAILENDRA 

MARKET INSIGHT

December 14th, 2021

LARGE
CAP

An illustration of a man in a dark blue pinstriped suit and glasses, pushing a large, heavy grey sphere. The sphere is labeled 'LARGE CAP' in white, bold, sans-serif font. The man is pushing the sphere up a blue ramp that is part of a larger upward-trending line graph. The background is a dark purple space with white stars.

Mid Cap Magic

December – January Strategy

Mid Cap Magic: Dec-Jan Strategy

14 Desember 2021



Strategi Investasi Mid-Desember hingga bulan Januari

- Menjelang pergantian bulan Desember ke Januari, investor dapat berinvestasi pada reksa dana yang memiliki aset alokasi terbesar di saham-saham berkapitalisasi menengah (kapitalisasi pasar di bawah IDR 30 triliun).
- Dalam ± 6 tahun terakhir, indeks Mid Cap (Infovesta Mid Cap Core Index) tumbuh 1.8x (80%) lebih besar dari indeks Big Cap (Infovesta Large Cap Core Index). Di periode tersebut, indeks Mid Cap menghasilkan tingkat pengembalian sebesar +165% vs. indeks Big Cap yang hanya menghasilkan kinerja sebesar +50%.
- Melihat kinerja rata-rata 5 tahun terakhir, investasi yang di mulai pada pertengahan bulan Desember hingga akhir Januari pada indeks Mid Cap menghasilkan kinerja yang lebih tinggi dibandingkan dengan investasi yang di mulai pada akhir bulan Desember.

Pandangan Syailendra

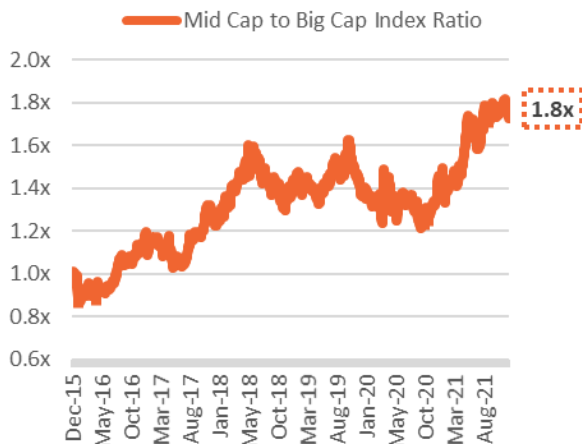
Kami melihat adanya peluang investasi pada reksa dana berbasis Mid Cap menjelang pergantian bulan Januari ini. Produk unggulan Syailendra yaitu Syailendra Balanced Opportunity Fund (SBOF) merupakan produk yang tepat bagi investor yang ingin memanfaatkan momentum ini.

SBOF adalah reksa dana campuran yang secara mayoritas berinvestasi pada kelas aset saham. 62.3% kelas aset saham SBOF berinvestasi di saham-saham berkapitalisasi menengah.

Secara YTD, SBOF (+22%) berhasil mengalahkan kinerja indeks Mid Cap (+18%), Big Cap (-5%), dan IHSG (+10%).

Rasio Indeks Mid Cap - Big Cap

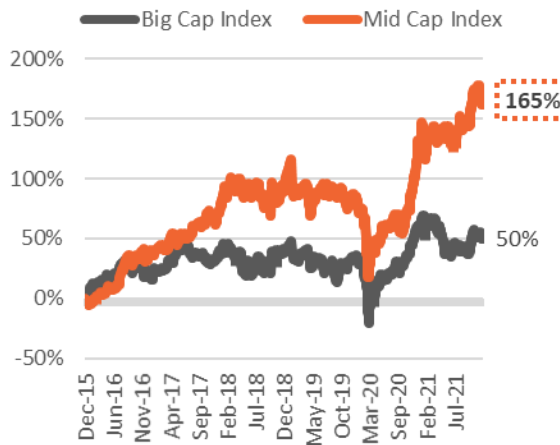
Indeks Mid Cap tumbuh 1.8x lebih besar



Sumber: Syailendra Capital, Investpro (Indeks Infovesta Large Cap Core & Indeks Infovesta Mid Cap Core). Periode 30 Desember 2015 – 6 Desember 2021.

Kinerja Mid Cap vs. Big Cap

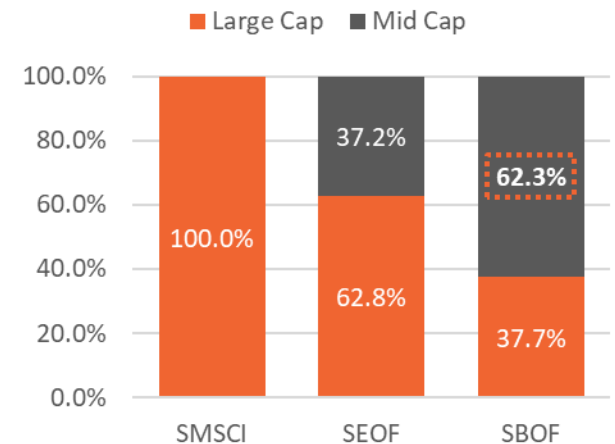
Indeks Mid Cap meraih kinerja 165%



Sumber: Syailendra Capital, Investpro (Indeks Infovesta Large Cap Core & Indeks Infovesta Mid Cap Core). Periode 30 Desember 2015 – 6 Desember 2021.

Aset Alokasi Reksa Dana Syailendra

SBOF berinvestasi pada saham Mid Cap (62%)



Sumber: Syailendra Capital. Per 6 Desember 2021. Syailendra MSCI Indonesia Value Index Fund (SMSCI), Syailendra Equity Opportunity Fund (SEOF) & Syailendra Balanced Opportunity Fund (SBOF).

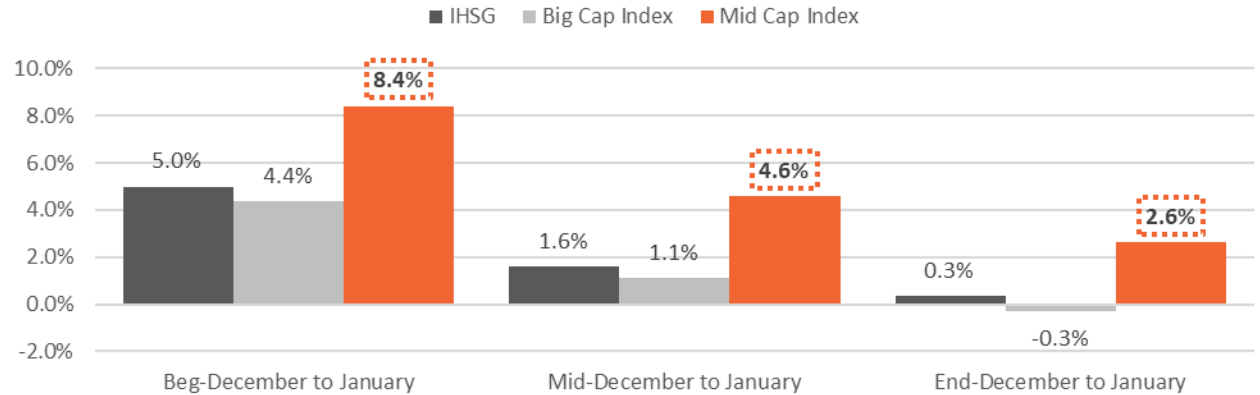
Peluang Investasi Pertengahan Desember - Januari

Melihat kinerja rata-rata 5 tahun terakhir, indeks *Mid Cap* menghasilkan kinerja yang lebih tinggi dibandingkan dengan IHSI dan indeks *Big Cap* pada periode Desember hingga Januari.

Investasi yang dimulai pada pertengahan bulan Desember secara historis menghasilkan kinerja yang lebih baik dibandingkan dengan berinvestasi pada akhir bulan Desember.

Kinerja Rata-Rata 5 Tahun Desember – Januari (2016-2020)

Secara historis, kinerja indeks *Mid Cap* mengalahkan IHSI dan *Large Cap* di periode Des - Jan



Sumber: Syailendra Capital, Investpro (Indeks Infovesta Large Cap Core & Indeks Infovesta Mid Cap Core). Periode Beg. December to January (11/30 – 12/30), Mid. December to January (12/15 – 12/30)

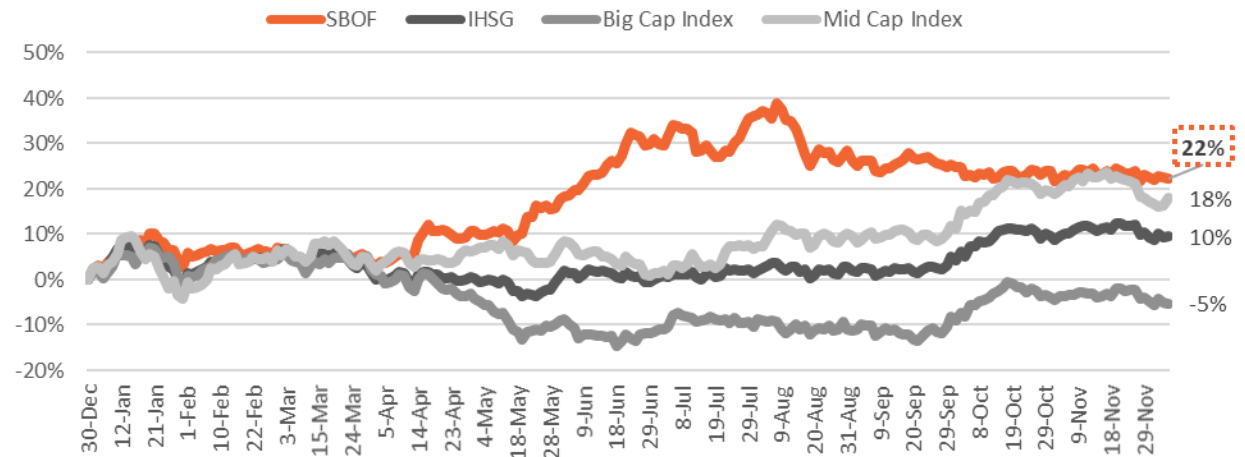
SBOF Mengalahkan IHSI, Indeks Mid Cap & Big Cap

SBOF memiliki kinerja YTD sebesar +22%. Kinerja SBOF sepanjang tahun berhasil mengalahkan kinerja indeks *Mid Cap* +18%, IHSI +10% dan *Big Cap* -5%.

SBOF berinvestasi pada kelas aset saham berkapitalisasi menengah. Per 6 Desember 2021, sebesar 62% kelas aset saham SBOF berinvestasi pada saham-saham *Mid Cap*.

Kinerja SBOF, IHSI, Indeks Mid Cap & Big Cap

Performa SBOF mengalahkan performa indeks *Mid Cap* & *Large Cap* secara *year to date* (YTD)



Sumber: Syailendra Capital, Investpro (Indeks Infovesta Large Cap Core & Indeks Infovesta Mid Cap Core). Periode 30 Desember 2020 – 6 Desember 2021.

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