

Thursday, December 01, 2016

## Ringkasan Utama

- Snapshot Global:** Pasar global mencermati adanya berita bahwa OPEC ternyata dapat membuahkannya sepekat mengenai penurunan produksi minyak bumi, lain dari perkiraan pasar sebelumnya. Penurunan sebesar 1,2jt barel per hari menjadi 32,5jt bph tersebut merupakan pemangkasan produksi yang pertama kalinya dalam 8 tahun belakangan. Hal tersebut menyebabkan kenaikan harga minyak bumi. Contohnya, harga Brent melambung naik hampir 10% dan berkisar di sekitar level 51,6 dolar per barel pagi ini.
- Indonesia:** Menteri Energi, Ignasius Jonan, menyatakan bahwa penurunan produksi minyak bumi OPEC tidak berdampak positif kepada Indonesia mengingat efek menaikkan harga yang merugikan negara net importir minyak bumi seperti Indonesia. Sementara itu, juga tersebar berita bahwa Indonesia telah mengajukan permohonan untuk melakukan suspensi keanggotaan di OPEC. Hal ini dikarenakan adanya keberatan pihak Indonesia untuk mengadakan penurunan produksi minyak bumi dalam kadar yang diajukan oleh kartel tersebut.

## Analisa Sekilas

- FX:** Dengan adanya berita mendadak dari OPEC yang menyebabkan kenaikan harga minyak bumi, mata uang produsen minyak dunia ikut terbawa menguat, termasuk Ringgit Malaysia.

## Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	13555	EUR-USD	1,0589	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14442,18	GBP-USD	1,2506	DJIA	19123,58	1,98
GBP-IDR	16935,62	USD-JPY	114,46	Nasdaq	5323,68	-56,24
JPY-IDR	120,02	AUD-USD	0,7385	Nikkei 225	18308,48	1,44
AUD-IDR	10135,08	NZD-USD	0,7083	STI	2905,17	26,03
CAD-IDR	10097,50	USD-CAD	1,3437	KLCI	1619,12	-7,81
SGD-IDR	9511,97	USD-CHF	1,0173	JCI	5148,91	12,24
MYR-IDR	3034,98	USD-NOK	8,5249	Baltic Dry	1204,00	2,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)			
O/N	4,20	1Y	6,91			
1 Minggu	4,87	2Y	7,89			
1 Bulan	6,11	5Y	7,99			
3 Bulan	7,01	10Y	8,14			
6 Bulan	7,23	15Y	8,25			
12 Bulan	7,41	20Y	8,25			

For reference only. Source: Bloomberg, OCBC Bank

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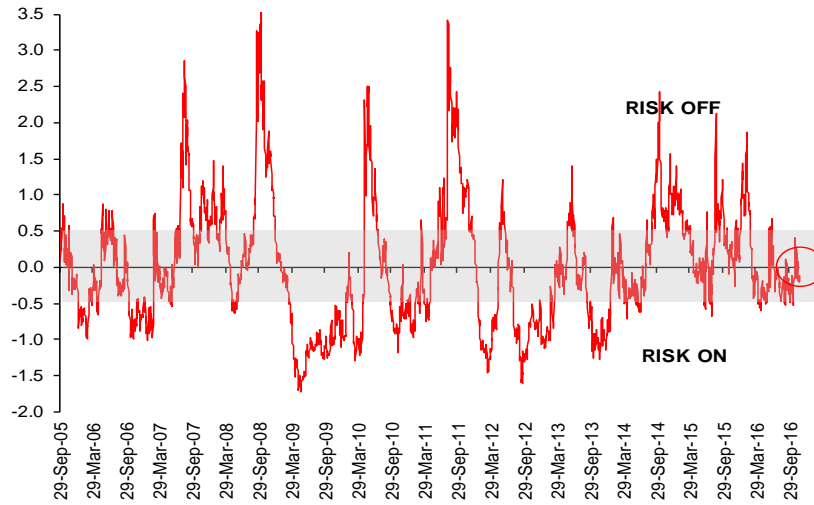
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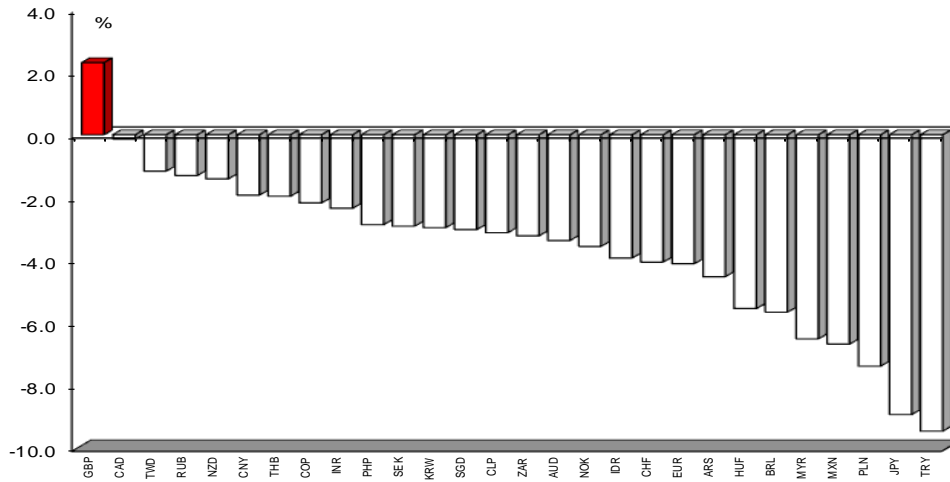
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**FX Sentiment Index**



Source: OCBC Bank

**FX performance: 1-month change agst USD**



Source: Bloomberg

### Key Economic Indicators

Date	Time	Event	Survey	Actual	Prior	Revised	
11/30/2016 07:00	SK	Industrial Production YoY	Oct	-1.30%	-1.60%	-2.00%	-1.70%
11/30/2016 07:50	JN	Industrial Production MoM	Oct P	0.00%	0.10%	0.60%	--
11/30/2016 08:00	NZ	ANZ Business Confidence	Nov	--	20.5	24.5	--
11/30/2016 08:01	UK	GfK Consumer Confidence	Nov	-4	-8	-3	--
11/30/2016 08:30	AU	Building Approvals MoM	Oct	2.00%	-12.60%	-8.70%	-9.30%
11/30/2016 08:30	AU	Private Sector Credit MoM	Oct	0.40%	0.50%	0.40%	--
11/30/2016 11:06	MU	Hotel Occupancy Rate	Oct	--	83.5	82.1	--
11/30/2016 15:30	TH	Exports YoY	Oct	--	-4.30%	3.50%	--
11/30/2016 15:30	TH	BoP Current Account Balance	Oct	\$3075m	\$2875m	\$2929m	--
11/30/2016 15:45	FR	CPI EU Harmonized YoY	Nov P	0.60%	0.70%	0.50%	--
11/30/2016 15:45	FR	CPI YoY	Nov P	0.50%	0.50%	0.40%	--
11/30/2016 16:55	GE	Unemployment Change (000's)	Nov	-5k	-5k	-13k	--
11/30/2016 18:00	EC	CPI Estimate YoY	Nov	0.60%	0.60%	0.50%	--
11/30/2016 18:00	EC	CPI Core YoY	Nov A	0.80%	0.80%	0.80%	--
11/30/2016 18:00	IT	CPI NIC incl. tobacco MoM	Nov P	-0.20%	-0.10%	0.00%	-0.10%
11/30/2016 18:00	IT	CPI EU Harmonized YoY	Nov P	0.10%	0.10%	-0.10%	--
11/30/2016 18:00	IT	CPI EU Harmonized MoM	Nov P	-0.20%	-0.20%	0.20%	--
11/30/2016 19:00	IT	PPI MoM	Oct	--	-0.20%	-0.10%	--
11/30/2016 20:00	US	MBA Mortgage Applications	Nov-25	--	-9.40%	5.50%	--
11/30/2016 21:15	US	ADP Employment Change	Nov	170k	216k	147k	119k
11/30/2016 21:30	US	Personal Income	Oct	0.40%	0.60%	0.30%	0.40%
11/30/2016 21:30	CA	GDP MoM	Sep	0.10%	0.30%	0.20%	--
11/30/2016 21:30	US	Personal Spending	Oct	0.50%	0.30%	0.50%	0.70%
11/30/2016 21:30	CA	Quarterly GDP Annualized	3Q	3.40%	3.50%	-1.60%	-1.30%
11/30/2016 21:30	CA	Industrial Product Price MoM	Oct	0.60%	0.70%	0.40%	--
11/30/2016 22:45	US	Chicago Purchasing Manager	Nov	52.5	57.6	50.6	--
11/30/2016 23:00	US	Pending Home Sales MoM	Oct	0.10%	0.10%	1.50%	1.40%
12/01/2016 07:00	SK	CPI YoY	Nov	1.40%	1.30%	1.30%	--
12/01/2016 07:50	JN	Capital Spending YoY	3Q	-0.40%	-1.30%	3.10%	--
12/01/2016 08:00	SK	Exports YoY	Nov	1.60%	--	-3.20%	--
12/01/2016 08:30	ID	Nikkei Indonesia PMI Mfg	Nov	--	--	48.7	--
12/01/2016 08:30	TA	Nikkei Taiwan PMI Mfg	Nov	--	--	52.7	--
12/01/2016 08:30	VN	Nikkei Vietnam PMI Mfg	Nov	--	--	51.7	--
12/01/2016 08:30	SK	Nikkei South Korea PMI Mfg	Nov	--	--	48	--
12/01/2016 08:30	JN	Nikkei Japan PMI Mfg	Nov F	--	--	51.1	--
12/01/2016 09:00	CH	Manufacturing PMI	Nov	51	--	51.2	--
12/01/2016 09:00	CH	Non-manufacturing PMI	Nov	--	--	54	--
12/01/2016 09:45	CH	Caixin China PMI Mfg	Nov	51	--	51.2	--
12/01/2016 11:30	TH	CPI YoY	Nov	0.63%	--	0.34%	--
12/01/2016 13:00	IN	Nikkei India PMI Mfg	Nov	--	--	54.4	--
12/01/2016 13:30	AU	Commodity Index SDR YoY	Nov	--	--	16.00%	--
12/01/2016 15:00	UK	Nationwide House Px NSA YoY	Nov	4.70%	--	4.60%	--
12/01/2016 15:00	UK	Nationwide House PX MoM	Nov	0.20%	--	0.00%	--
12/01/2016 16:30	HK	Retail Sales Value YoY	Oct	-5.20%	--	-4.10%	--
12/01/2016 16:45	IT	Markit/ADACI Italy Mfg PMI	Nov	51.3	--	50.9	--
12/01/2016 16:50	FR	Markit France Mfg PMI	Nov F	51.5	--	51.5	--
12/01/2016 16:55	GE	Markit/BME Germany Mfg PMI	Nov F	54.4	--	54.4	--
12/01/2016 17:00	EC	Markit Eurozone Mfg PMI	Nov F	53.7	--	53.7	--
12/01/2016 17:30	UK	Markit UK PMI Mfg SA	Nov	54.4	--	54.3	--
12/01/2016 18:00	EC	Unemployment Rate	Oct	10.00%	--	10.00%	--
12/01/2016 18:00	IT	GDP WDA YoY	3Q F	0.90%	--	0.90%	--
12/01/2016 21:30	US	Initial Jobless Claims	Nov-26	253k	--	251k	--
12/01/2016 21:30	US	Continuing Claims	Nov-19	2033k	--	2043k	--
12/01/2016 22:30	CA	RBC Canadian Mfg PMI	Nov	--	--	51.1	--
12/01/2016 22:45	US	Markit US Manufacturing PMI	Nov F	53.9	--	53.9	--
12/01/2016 23:00	US	Construction Spending MoM	Oct	0.60%	--	-0.40%	--
12/01/2016 23:00	US	ISM Manufacturing	Nov	52.5	--	51.9	--
12/01/2016	ID	CPI YoY	Nov	3.41%	--	3.31%	--
12/01/2016 12/07	ID	Foreign Reserves	Nov	--	--	\$115.04b	--

Source: Bloomberg

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