

Wednesday, March 02, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar Eropa dan AS terasa membaik secara signifikan kemarin, dengan indeks S&P 500 naik lebih dari 2%. Adanya data ISM yang menunjukkan bahwa prospek sektor manufaktur AS ternyata lebih baik dari yang diantisipasi pasar sebelumnya menjadi faktor pendukung utama. Untuk sesi Asia hari ini, hal ini akan membantu. Namun, pasar akan mencermati adanya perubahan outlook oleh Moody's untuk China, di mana mereka merubah dari stable menjadi negatif.
- **Indonesia:** Data inflasi untuk Februari menunjukkan kenaikan menjadi 4,42%yoy, di atas ekspektasi pasar 4,36% dan 4,14% untuk bulan Januari, dengan adanya peningkatan harga bahan makanan telah diproses maupun harga sandang.

Analisa Sekilas

- **FX:** GBP menguat untuk keempat harinya terhadap EUR, dengan adanya adanya reversal dari kelemahan sebelumnya, karena pasar menganggap bahwa impact Brexit mungkin tidak akan separah yang diantisipasi sebelumnya.

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Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	13347	EUR-USD	1,0868	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14518,71	GBP-USD	1,3952	DJIA	16865,08	348,58
GBP-IDR	18623,12	USD-JPY	114,01	Nasdaq	4689,60	131,65
JPY-IDR	117,82	AUD-USD	0,7175	Nikkei 225	16085,51	58,75
AUD-IDR	9555,56	NZD-USD	0,6629	STI	2682,39	15,88
CAD-IDR	9871,99	USD-CAD	1,3410	KLCI	1670,82	16,07
SGD-IDR	9518,05	USD-CHF	0,9974	JCI	4779,99	9,03
MYR-IDR	3201,18	USD-NOK	8,6504	Baltic Dry	332,00	3,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)			
O/N	5,15	1Y	7,23			
1 Minggu	5,79	2Y	7,78			
1 Bulan	6,61	5Y	7,96			
3 Bulan	7,40	10Y	8,27			
6 Bulan	7,97	15Y	8,60			
12 Bulan	8,34	20Y	8,62			

For reference only. Source: Bloomberg, OCBC Bank

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Key Economic Indicators

Date Time	Event	Survey	Actual	Prior	Revised
03/01/2016 06:30	AU AiG Perf of Mfg Index	Feb --	53.5	51.5	--
03/01/2016 07:30	JN Jobless Rate	Jan 3.30%	3.20%	3.30%	--
03/01/2016 07:30	JN Job-To-Applicant Ratio	Jan 1.27	1.28	1.27	--
03/01/2016 07:30	JN Overall Household Spending YoY	Jan -2.70%	-3.10%	-4.40%	--
03/01/2016 07:50	JN Capital Spending YoY	4Q 8.70%	8.50%	11.20%	--
03/01/2016 08:00	SK Exports YoY	Feb -16.60%	-12.20%	-18.50%	-18.80%
03/01/2016 08:30	AU BoP Current Account Balance	4Q -20.0b	-21.1b	-18.1b	-18.8b
03/01/2016 08:30	AU Building Approvals MoM	Jan -3.00%	-7.50%	9.20%	8.60%
03/01/2016 08:30	AU Building Approvals YoY	Jan -8.50%	-15.50%	-2.50%	-3.30%
03/01/2016 09:00	CH Manufacturing PMI	Feb 49.4	49	49.4	--
03/01/2016 09:45	CH Caixin China PMI Mfg	Feb 48.4	48	48.4	--
03/01/2016 10:00	JN Nikkei Japan PMI Mfg	Feb F --	50.1	50.2	--
03/01/2016 10:30	TA Nikkei Taiwan PMI Mfg	Feb --	49.4	50.6	--
03/01/2016 11:00	ID Nikkei Indonesia PMI Mfg	Feb --	48.7	48.9	--
03/01/2016 11:30	AU RBA Cash Rate Target	Mar-01 2.00%	2.00%	2.00%	--
03/01/2016 11:30	TH CPI YoY	Feb -0.51%	-0.50%	-0.53%	--
03/01/2016 12:00	VN Nikkei Vietnam PMI Mfg	Feb --	50.3	51.5	--
03/01/2016 12:07	ID CPI YoY	Feb 4.36%	4.42%	4.14%	--
03/01/2016 13:00	IN Nikkei India PMI Mfg	Feb --	51.1	51.1	--
03/01/2016 13:30	AU Commodity Index YoY	Feb --	-21.60%	-25.80%	-24.80%
	Markit/ADACI Italy Manufacturing				
03/01/2016 16:45	IT PMI	Feb 52.3	52.2	53.2	--
03/01/2016 16:50	FR Markit France Manufacturing PMI	Feb F 50.3	50.2	50.3	--
03/01/2016 16:55	GE Unemployment Change (000's)	Feb -10k	-10k	-20k	-19k
03/01/2016 16:55	GE Unemployment Claims Rate SA	Feb 6.20%	6.20%	6.20%	--
	Markit/BME Germany				
03/01/2016 16:55	GE Manufacturing PMI	Feb F 50.2	50.5	50.2	--
03/01/2016 17:00	EC Markit Eurozone Manufacturing	Feb F 51	51.2	51	--
03/01/2016 17:30	UK Markit UK PMI Manufacturing SA	Feb 52.3	50.8	52.9	--
03/01/2016 18:00	EC Unemployment Rate	Jan 10.40%	10.30%	10.40%	--
03/01/2016 21:30	CA Quarterly GDP Annualized	4Q 0.00%	0.80%	2.30%	2.40%
03/01/2016 22:30	CA RBC Canadian Manufacturing PMI	Feb --	49.4	49.3	--
03/01/2016 22:45	US Markit US Manufacturing PMI	Feb F 51.2	51.3	51	--
03/01/2016 23:00	US ISM Manufacturing	Feb 48.5	49.5	48.2	--
03/01/2016 23:00	US Construction Spending MoM	Jan 0.30%	1.50%	0.10%	0.60%
03/02/2016 07:00	NZ QV House Prices YoY	Feb --	11.60%	12.60%	--
03/02/2016 07:00	SK Industrial Production SA MoM	Jan -1.00%	-1.80%	1.30%	0.50%
03/02/2016 07:00	SK Industrial Production YoY	Jan -0.60%	-1.90%	-1.90%	-2.20%
03/02/2016 07:50	JN Monetary Base YoY	Feb --	--	28.90%	--
03/02/2016 08:00	AU HIA New Home Sales MoM	Jan --	--	6.00%	--
03/02/2016 08:30	AU GDP SA QoQ	4Q 0.40%	--	0.90%	--
03/02/2016 09:30	SK Nikkei South Korea PMI Mfg	Feb --	--	49.5	--
03/02/2016 16:00	SI Automobile COE Open Bid Cat A	Mar-02 --	--	43000	--
03/02/2016 17:30	UK Markit/CIPS UK Construction PMI	Feb 55.5	--	55	--
03/02/2016 20:00	US MBA Mortgage Applications	Feb-26 --	--	-4.30%	--
03/02/2016 21:00	SI Purchasing Managers Index	Feb 48.9	--	49	--
03/02/2016 21:15	US ADP Employment Change	Feb 190k	--	205k	--
03/01/2016 03/04	PH Budget Balance PHP	Dec --	--	6.0b	--
03/02/2016 03/07	ID Foreign Reserves	Feb --	--	\$102.13b	--

Source: Bloomberg

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