

Tuesday, August 02, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar terasa tertahan di level belum menentu dengan adanya penurunan harga minyak bumi dunia karena adanya kekhawatiran tentang kemungkinan terlalu banyak suplai di pasar. Sementara itu, setelah data PDB dari AS yang buruk dari minggu lalu, pasar juga sedang menunggu data lapangan kerja dari AS pada akhir minggu ini. Pasar telah memberikan forecast bahwa sebanyak 180rb pekerjaan akan diciptakan, dibandingkan 287rb pada bulan sebelumnya.
- **Indonesia:** Presiden Joko Widodo menyatakan bahwa pemerintah Indonesia akan “go all out” untuk mensukseskan program pengampunan pajak atau Tax Amnesty. Hal ini termasuk memastikan bahwa dasar hukum masih kuat, walaupun adanya tuntutan di Mahkamah Konstitusi.

Analisa Sekilas

- **FX:** AUD bertahan di level lemah terhadap mata uang lainnya dengan adanya antisipasi bahwa bank sentral Australia akan menurunkan suku bunga mereka minggu depan.

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Financial Market Indicators (Indonesia)

| Nilai Mata Uang | | | Bursa Saham dan Komoditas | | | |
|-----------------|----------------|---------|----------------------------------|------------|--------------------|--------|
| USD-IDR | 13047 | EUR-USD | 1.1163 | Index | Nilai Indeks/Harga | Nett |
| EUR-IDR | 14566.94 | GBP-USD | 1.3179 | DJIA | 18404.51 | -27.73 |
| GBP-IDR | 17216.29 | USD-JPY | 102.39 | Nasdaq | 5184.20 | 22.06 |
| JPY-IDR | 127.60 | AUD-USD | 0.7536 | Nikkei 225 | 16635.77 | 66.50 |
| AUD-IDR | 9889.0 | NZD-USD | 0.7172 | STI | 2892.52 | 23.83 |
| CAD-IDR | 9984.94 | USD-CAD | 1.3124 | KLCI | 1665.23 | 11.97 |
| SGD-IDR | 9742.52 | USD-CHF | 0.9685 | JCI | 5361.58 | 145.58 |
| MYR-IDR | 3241.77 | USD-NOK | 8.4980 | Baltic Dry | 650.00 | -6.00 |
| JIBOR (Rupiah) | | | Obligasi Pemerintah (Govt Bonds) | | | |
| Tenor | Suku Bunga (%) | Tenor | Imbal Hasil (%) | | | |
| O/N | 4.65 | 1Y | 6.53 | | | |
| 1 Minggu | 5.34 | 2Y | 6.54 | | | |
| 1 Bulan | 6.19 | 5Y | 6.73 | | | |
| 3 Bulan | 7.15 | 10Y | 6.90 | | | |
| 6 Bulan | 7.41 | 15Y | 7.19 | | | |
| 12 Bulan | 7.69 | 20Y | 7.30 | | | |

For reference only. Source: Bloomberg, OCBC Bank

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Key Economic Indicators

| Date Time | Event | Survey | Actual | Prior | Revised |
|-------------------------|--|---------------|---------------|----------------|------------------|
| 08/01/2016 07:00 | SK BoP Current Account Balance | Jun | -- \$12168.4m | \$10361.3m | -- |
| 08/01/2016 07:30 | AU AiG Perf of Mfg Index | Jul | -- | 56.4 | 51.8 |
| 08/01/2016 08:00 | SK Exports YoY | Jul | -6.70% | -10.20% | -2.70% |
| 08/01/2016 08:00 | SK Imports YoY | Jul | -10.50% | -14.00% | -8.00% |
| 08/01/2016 09:00 | AU Melbourne Ins. Inflation MoM | Jul | -- | -0.30% | 0.60% |
| 08/01/2016 09:00 | AU HIA New Home Sales MoM | Jun | -- | 8.20% | -4.40% |
| 08/01/2016 09:00 | CH Manufacturing PMI | Jul | 50 | 49.9 | 50 |
| 08/01/2016 09:00 | CH Non-manufacturing PMI | Jul | -- | 53.9 | 53.7 |
| 08/01/2016 09:30 | SK Nikkei South Korea PMI Mfg | Jul | -- | 50.1 | 50.5 |
| 08/01/2016 09:45 | CH Caixin China PMI Mfg | Jul | 48.8 | 50.6 | 48.6 |
| 08/01/2016 10:00 | JN Nikkei Japan PMI Mfg | Jul F | -- | 49.3 | 49 |
| 08/01/2016 10:30 | TA Nikkei Taiwan PMI Mfg | Jul | -- | 51 | 50.5 |
| 08/01/2016 11:00 | ID Nikkei Indonesia PMI Mfg | Jul | -- | 48.4 | 51.9 |
| 08/01/2016 11:30 | TH CPI YoY | Jul | 0.50% | 0.10% | 0.38% |
| 08/01/2016 12:00 | VN Nikkei Vietnam PMI Mfg | Jul | -- | 51.9 | 52.6 |
| 08/01/2016 12:05 | ID CPI YoY | Jul | 3.37% | 3.21% | 3.45% |
| 08/01/2016 13:00 | IN Nikkei India PMI Mfg | Jul | -- | 51.8 | 51.7 |
| 08/01/2016 13:00 | JN Vehicle Sales YoY | Jul | -- | -0.20% | 3.00% |
| 08/01/2016 15:45 | IT Markit/ADACI Italy Mfg PMI | Jul | 52.5 | 51.2 | 53.5 |
| 08/01/2016 15:50 | FR Markit France Mfg PMI | Jul F | 48.6 | 48.6 | 48.6 |
| 08/01/2016 15:55 | GE Markit/BME GE Mfg PMI | Jul F | 53.7 | 53.8 | 53.7 |
| 08/01/2016 16:00 | EC Markit Eurozone Mfg PMI | Jul F | 51.9 | 52 | 51.9 |
| 08/01/2016 16:30 | UK Markit UK PMI Mfg SA | Jul F | 49.1 | 48.2 | 49.1 |
| 08/01/2016 21:45 | US Markit US Manufacturing PMI | Jul F | 52.9 | 52.9 | 52.9 |
| 08/01/2016 22:00 | US Construction Spending MoM | Jun | 0.50% | -0.60% | -0.80% |
| 08/01/2016 22:00 | US ISM Manufacturing | Jul | 53 | 52.6 | 53.2 |
| 08/01/2016 22:00 | US ISM Prices Paid | Jul | 61 | 55 | 60.5 |
| 08/02/2016 07:00 | SK CPI YoY | Jul | 0.80% | 0.70% | 0.80% |
| 08/02/2016 07:50 | JN Monetary Base YoY | Jul | -- | -- | 25.40% |
| 08/02/2016 08:00 | NZ QV House Prices YoY | Jul | -- | -- | 13.50% |
| 08/02/2016 09:30 | AU Trade Balance | Jun | -2000m | -- | -2218m |
| 08/02/2016 09:30 | AU Building Approvals MoM | Jun | 0.80% | -- | -5.20% |
| 08/02/2016 09:30 | AU Building Approvals YoY | Jun | -2.40% | -- | -9.10% |
| 08/02/2016 11:00 | NZ 2Yr Inflation Expectation | 3Q | -- | -- | 1.64% |
| 08/02/2016 12:30 | AU RBA Cash Rate Target | Aug-02 | 1.50% | -- | 1.75% |
| 08/02/2016 14:30 | AU Commodity Index AUD | Jul | -- | -- | 89.7 |
| 08/02/2016 14:30 | AU Commodity Index YoY | Jul | -- | -- | -9.90% |
| 08/02/2016 16:30 | UK Markit/CIPS UK Con. PMI | Jul | 44 | -- | 46 |
| 08/02/2016 16:30 | HK Retail Sales Value YoY | Jun | -8.10% | -- | -8.40% |
| 08/02/2016 17:00 | EC PPI YoY | Jun | -3.40% | -- | -3.90% |
| 08/02/2016 20:30 | US Personal Income | Jun | 0.30% | -- | 0.20% |
| 08/02/2016 20:30 | US Personal Spending | Jun | 0.30% | -- | 0.40% |
| 08/02/2016 20:30 | US PCE Core MoM | Jun | 0.10% | -- | 0.20% |
| 08/02/2016 21:00 | SI Purchasing Managers Index | Jul | 49.5 | -- | 49.6 |
| 08/02/2016 21:30 | CA RBC Canadian Mfg PMI | Jul | -- | -- | 51.8 |
| 08/02/2016 08/05 | ID Foreign Reserves | Jul | -- | -- | \$109.79b |

Source: Bloomberg

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