

Monday, January 04, 2016

Ringkasan Utama

- Snapshot Global:** Selamat Tahun Baru! Untuk hari kerja pertama tahun 2016 ini, pasar akan cenderung fokus dengan adanya kenaikan harga minyak bumi dunia, dengan adanya berita bahwa ketegangan hubungan antara Saudi Arabia dan Iran mengalami kenaikan setelah adanya berita tentang eksekusi ulama Shiite. Harga WTI dan Brent merangkak naik lebih dari 2%, dengan adanya rasa kekhawatiran pasar bahwa jika masih terus terjadi eskalasi situasi tersebut, ada kemungkinan bahwa produksi minyak bumi dunia akan terganggu.
- Indonesia:** Departemen Keuangan menyatakan bahwa ekonomi Indonesia kemungkinan hanya bertumbuh sebesar 4,73% di tahun 2015, lebih rendah dari target 5,7% yang diambil RAPBN tersebut. Sementara itu, defisit anggaran mencapai 2,8% dari PDB, lebih tinggi dibandingkan target 1,9% pemerintah.

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Analisa Sekilas

- FX:** Adanya gejolak geopolitik di Timur Tengah menyebabkan terjadinya penguatan mata uang safe haven, termasuk USD yang menguat terhadap mata uang lainnya.

Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	13788	EUR-USD	1,0862	Index	Nilai Indeks/Harga	Nett
EUR-IDR	15061,53	GBP-USD	1,4736	DJIA	17425,03	-178,84
GBP-IDR	20462,23	USD-JPY	120,22	Nasdaq	5007,41	-58,43
JPY-IDR	114,59	AUD-USD	0,7286	Nikkei 225	19033,71	0,00
AUD-IDR	10092,74	NZD-USD	0,6831	STI	2882,73	-2,78
CAD-IDR	9929,89	USD-CAD	1,3839	KLCI	1692,51	-0,63
SGD-IDR	9765,42	USD-CHF	1,0021	JCI	4593,01	0,00
MYR-IDR	3210,69	USD-NOK	8,8431	Baltic Dry	478,00	0,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)			
O/N	7,59	1Y	8,08			
1 Minggu	8,68	2Y	8,61			
1 Bulan	8,55	5Y	8,82			
3 Bulan	8,86	10Y	8,75			
6 Bulan	9,02	15Y	8,97			
12 Bulan	9,11	20Y	8,96			

For reference only. Source: Bloomberg, OCBC Bank

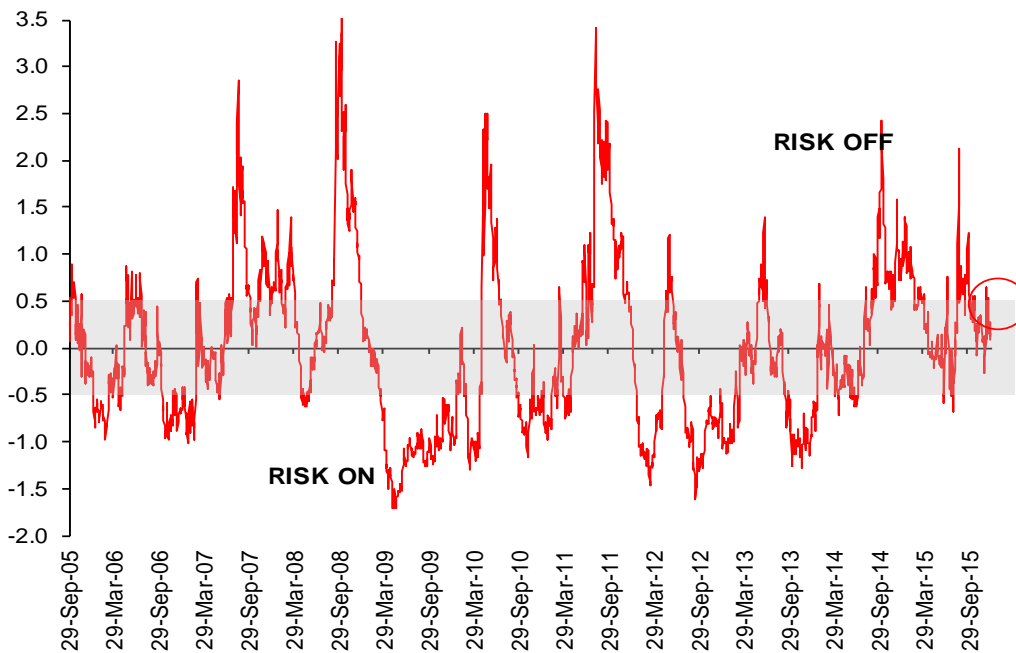
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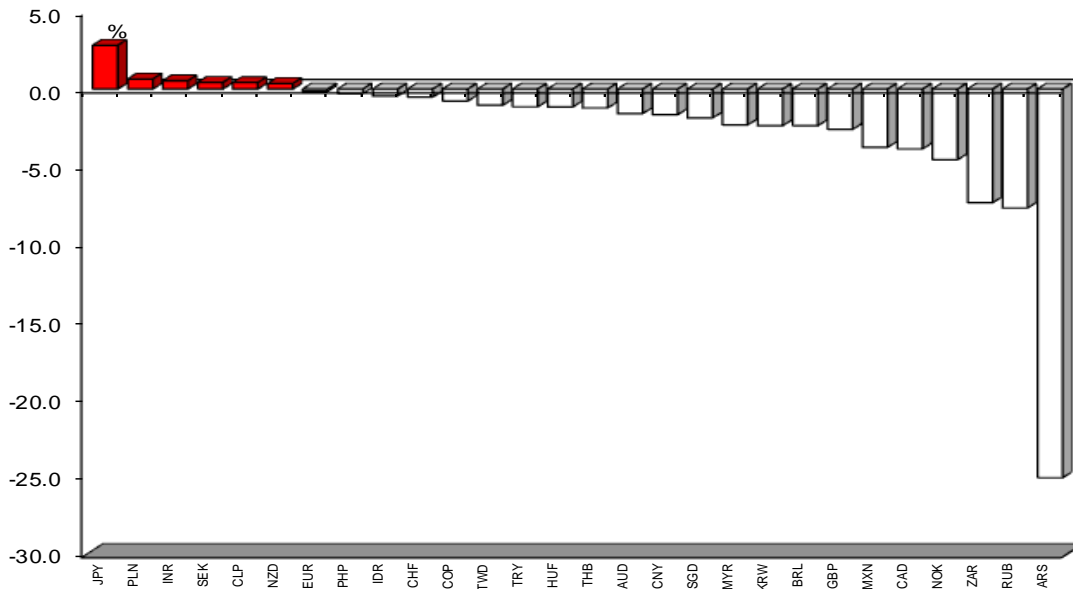
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time	Event	Survey	Actual	Prior	Revised	
12/31/2015 07:00	SK CPI YoY	Dec	1.10%	1.30%	1.00%	--
12/31/2015 08:30	AU Private Sector Credit MoM	Nov	0.60%	0.40%	0.70%	--
12/31/2015 10:49	MU Unemployment Rate	Nov	--	1.90%	1.90%	--
12/31/2015 10:50	MU Hotel Occupancy Rate	Nov	--	84.6	77.6	--
12/31/2015 16:36	HK Money Supply M2 HKD YoY	Nov	--	10.90%	10.20%	--
12/31/2015 21:30	US Initial Jobless Claims	Dec-26	270k	287k	267k	--
12/31/2015 21:30	US Continuing Claims	Dec-19	2190k	2198k	2195k	--
12/31/2015 22:00	US ISM Milwaukee	Dec	48.5	48.53	45.34	--
12/31/2015 22:45	US Chicago Purchasing Manager	Dec	50	42.9	48.7	--
12/31/2015 22:45	US Bloomberg Consumer Comfort	Dec-27	--	43.6	42.2	--
01/01/2016 08:00	SK Exports YoY	Dec	-11.70%	-13.80%	-4.70%	-4.80%
01/01/2016 08:00	SK Imports YoY	Dec	-18.00%	-19.20%	-17.60%	--
01/01/2016 08:00	SK Trade Balance	Dec	\$8735m	\$7162m	\$10361m	\$10324m
01/01/2016 09:00	CH Manufacturing PMI	Dec	49.8	49.7	49.6	--
01/01/2016 09:00	CH Non-manufacturing PMI	Dec	--	54.4	53.6	--
01/04/2016 06:30	AU AiG Perf of Mfg Index	Dec	--	51.9	52.5	--
01/04/2016 08:00	SI GDP SAAR QoQ	4Q A	1.00%	5.70%	1.90%	1.70%
01/04/2016 08:00	SI GDP YoY	4Q A	1.20%	2.00%	1.90%	1.80%
01/04/2016 09:35	JN Nikkei Japan PMI Mfg	Dec F	--	--	52.5	--
01/04/2016 09:40	SK Nikkei South Korea PMI Mfg	Dec	--	--	49.1	--
01/04/2016 09:45	CH Caixin China PMI Mfg	Dec	48.9	--	48.6	--
01/04/2016 09:50	TA Nikkei Taiwan PMI Mfg	Dec	--	--	49.5	--
01/04/2016 10:00	VN Nikkei Vietnam PMI Mfg	Dec	--	--	49.4	--
01/04/2016 11:00	ID Nikkei Indonesia PMI Mfg	Dec	--	--	46.9	--
01/04/2016 11:30	TH CPI Core YoY	Dec	0.76%	--	0.88%	--
01/04/2016 11:30	TH CPI NSA MoM	Dec	-0.34%	--	-0.32%	--
01/04/2016 11:30	TH CPI YoY	Dec	-0.80%	--	-0.97%	--
01/04/2016 13:00	IN Nikkei India PMI Mfg	Dec	--	--	50.3	--
01/04/2016 13:30	AU Commodity Index AUD	Dec	--	--	75.6	--
01/04/2016 13:30	AU Commodity Index YoY	Dec	--	--	-22.00%	--
01/04/2016 16:30	HK Retail Sales Value YoY	Nov	-6.40%	--	-3.00%	--
01/04/2016 16:30	HK Retail Sales Volume YoY	Nov	-2.90%	--	1.20%	--
01/04/2016 16:45	IT Markit/ADACI Italy Manufacturing PMI	Dec	54.9	--	54.9	--
01/04/2016 16:50	FR Markit France Manufacturing PMI	Dec F	51.6	--	51.6	--
01/04/2016 16:55	GE Markit/BME Germany Manufacturing PMI	Dec F	53	--	53	--
01/04/2016 17:00	EC Markit Eurozone Manufacturing PMI	Dec F	53.1	--	53.1	--
01/04/2016 17:30	UK Net Lending Sec. on Dwellings	Nov	3.6b	--	3.6b	--
01/04/2016 17:30	UK Mortgage Approvals	Nov	69.8k	--	69.6k	--
01/04/2016 17:30	UK Money Supply M4 MoM	Nov	--	--	0.60%	--
01/04/2016 17:30	UK M4 Money Supply YoY	Nov	--	--	0.20%	--
01/04/2016 17:30	UK Markit UK PMI Manufacturing SA	Dec	52.8	--	52.7	--
01/04/2016 21:00	GE CPI MoM	Dec P	0.20%	--	0.10%	--
01/04/2016 21:00	GE CPI YoY	Dec P	0.60%	--	0.40%	--
01/04/2016 21:00	GE CPI EU Harmonized YoY	Dec P	0.40%	--	0.30%	--
01/04/2016 21:00	SI Purchasing Managers Index	Dec	--	--	49.2	--
01/04/2016 21:00	SI Electronics Sector Index	Dec	--	--	49	--
01/04/2016 22:30	CA RBC Canadian Manufacturing PMI	Dec	--	--	48.6	--
01/04/2016 22:45	US Markit US Manufacturing PMI	Dec F	51.1	--	51.3	--
01/04/2016 23:00	US Construction Spending MoM	Nov	0.70%	--	1.00%	--
01/04/2016 23:00	US ISM Manufacturing	Dec	49	--	48.6	--
01/04/2016 23:00	US ISM Prices Paid	Dec	36	--	35.5	--
01/04/2016	IT Budget Balance	Dec	--	--	-6.5b	--
01/04/2016	ID CPI YoY	Dec	--	--	4.89%	--
01/04/2016	ID CPI Core YoY	Dec	--	--	4.77%	--
01/04/2016 01/15	ID Consumer Confidence Index	Dec	--	--	103.7	--
01/04/2016 01/05	GE Retail Sales MoM	Nov	0.50%	--	-0.40%	-0.10%

Source: Bloomberg

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