

Tuesday, October 04, 2016

Ringkasan Utama

- Snapshot Global:** Pasar terasa bergerak tidak banyak, dengan indeks saham S&P 500 dan Dow Jones turun sedikit, sekitar 0,3% kemarin. Data ISM manufacturing bulan September yang lebih tinggi dari ekspektasi pasar dikira mendukung kemungkinan kenaikan suku bunga Federal Reserve tahun ini. Namun, yang menjadi fokus utama pasar dalam minggu ini adalah data Nonfarm Payrolls yang akan diterbitkan pada hari Jumat, di mana pasar memandangi data sebesar 174rb, berbandingkan 151rb bulan sebelumnya.
- Indonesia:** Inflasi headline untuk bulan September mencetak 3,07%yoy, tidak jauh berbeda dari antisipasi pasar. Walaupun data ini lebih tinggi dari angka 2,79% untuk bulan sebelumnya, hal ini menurut kami tidak akan menjadikan kendala bagi Bank Indonesia untuk kembali menurunkan suku bunga pada tanggal 20 Oktober nanti, mengingat kadar inflasi pada umumnya masih termasuk rendah.

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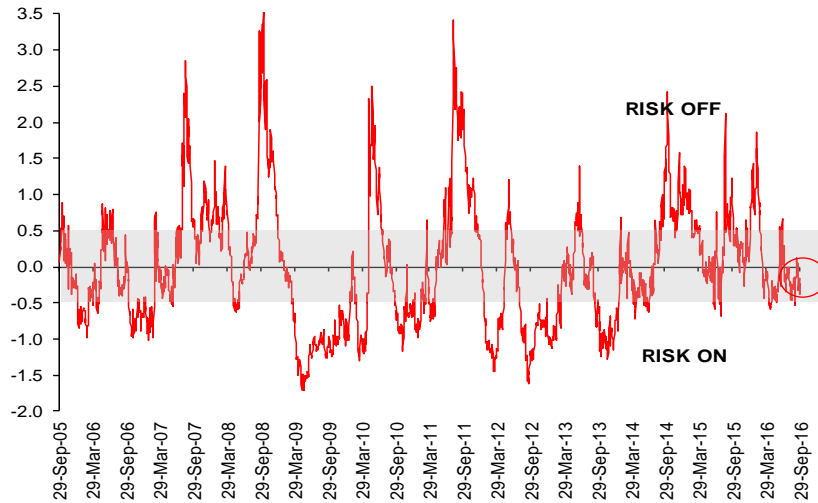
- FX:** Dolar AS kembali menguat terhadap mata uang lainnya, termasuk Japanese Yen, dengan adanya data sektor manufaktur AS yang mendukung.

Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	12983	EUR-USD	1,1211	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14584,89	GBP-USD	1,2842	DJIA	18253,85	-54,30
GBP-IDR	16716,33	USD-JPY	101,65	Nasdaq	5300,87	-11,13
JPY-IDR	128,02	AUD-USD	0,7675	Nikkei 225	16598,67	148,83
AUD-IDR	9957,29	NZD-USD	0,7275	STI	2870,84	1,37
CAD-IDR	9907,81	USD-CAD	1,3120	KLCI	1652,55	0,00
SGD-IDR	9509,63	USD-CHF	0,9735	JCI	5463,92	99,11
MYR-IDR	3155,50	USD-NOK	7,9810	Baltic Dry	864,00	-11,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)		Tenor	Imbal Hasil (%)		
O/N	4,90		1Y	6,21		
1 Minggu	5,34		2Y	6,59		
1 Bulan	6,23		5Y	6,83		
3 Bulan	7,08		10Y	7,02		
6 Bulan	7,29		15Y	7,29		
12 Bulan	7,51		20Y	7,38		

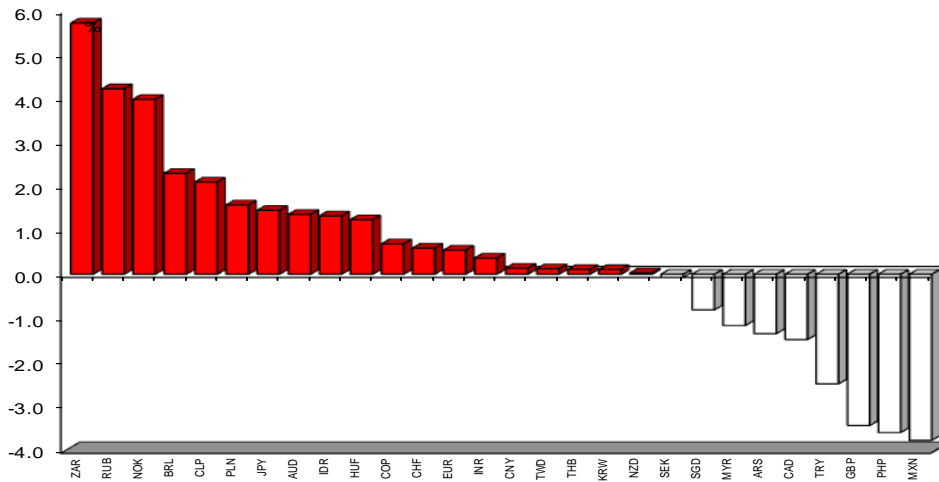
For reference only. Source: Bloomberg, OCBC Bank

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	
10/03/2016 07:50	JN	Tankan Large Mfg Index	3Q	7	6	6	--
10/03/2016 07:50	JN	Tankan Large Mfg Outlook	3Q	8	6	6	--
10/03/2016 07:50	JN	Tankan Large Non-Mfg Index	3Q	18	18	19	--
10/03/2016 08:30	ID	Nikkei Indonesia PMI Mfg	Sep	--	50.9	50.4	--
10/03/2016 08:30	TA	Nikkei Taiwan PMI Mfg	Sep	--	52.2	51.8	--
10/03/2016 08:30	VN	Nikkei Vietnam PMI Mfg	Sep	--	52.9	52.2	--
10/03/2016 08:30	JN	Nikkei Japan PMI Mfg	Sep F	--	50.4	50.3	--
10/03/2016 08:30	PH	Nikkei Philippines PMI Mfg	Sep	--	57.5	55.3	--
10/03/2016 08:30	TH	Nikkei Thailand PMI Mfg	Sep	--	48.8	49.8	--
10/03/2016 08:33	SI	URA Private Home Prices QoQ	3Q	--	-1.50%	-0.40%	--
10/03/2016 08:37	AU	Melbourne Insti. Inflation MoM	Sep	--	0.40%	0.20%	--
10/03/2016 08:37	AU	Melbourne Institute Inflation YoY	Sep	--	1.30%	1.20%	--
10/03/2016 11:30	TH	CPI YoY	Sep	0.40%	0.38%	0.29%	--
10/03/2016 11:30	TH	CPI NSA MoM	Sep	0.10%	0.04%	-0.04%	--
10/03/2016 11:30	TH	CPI Core YoY	Sep	0.80%	0.75%	0.79%	--
10/03/2016 12:05	ID	CPI YoY	Sep	3.05%	3.07%	2.79%	--
10/03/2016 12:05	ID	CPI NSA MoM	Sep	0.20%	0.22%	-0.02%	--
10/03/2016 12:05	ID	CPI Core YoY	Sep	3.21%	3.21%	3.32%	--
10/03/2016 13:00	IN	Nikkei India PMI Mfg	Sep	--	52.1	52.6	--
10/03/2016 13:00	JN	Vehicle Sales YoY	Sep	--	3.70%	5.70%	--
10/03/2016 15:45	IT	Markit/ADACI Italy Mfg PMI	Sep	50.3	51	49.8	--
10/03/2016 15:50	FR	Markit France Mfg PMI	Sep F	49.5	49.7	49.5	--
10/03/2016 15:55	GE	Markit/BME Germany Mfg PMI	Sep F	54.3	54.3	54.3	--
10/03/2016 16:00	EC	Markit Eurozone Mfg PMI	Sep F	52.6	52.6	52.6	--
10/03/2016 16:30	UK	Markit UK PMI Mfg SA	Sep	52.1	55.4	53.3	53.4
10/03/2016 21:00	SI	Purchasing Managers Index	Sep	49.9	50.1	49.8	--
10/03/2016 21:30	CA	RBC Canadian Mfg PMI	Sep	--	50.3	51.1	--
10/03/2016 21:45	US	Markit US Mfg PMI	Sep F	51.4	51.5	51.4	--
10/03/2016 22:00	US	Construction Spending MoM	Aug	0.30%	-0.70%	0.00%	-0.30%
10/03/2016 22:00	US	ISM Manufacturing	Sep	50.4	51.5	49.4	--
10/03/2016 22:00	US	ISM Prices Paid	Sep	53.5	53	53	--
10/04/2016 00:00	IT	New Car Registrations YoY	Sep	--	17.30%	20.12%	--
10/04/2016 07:00	NZ	QV House Prices YoY	Sep	--	14.30%	14.60%	--
10/04/2016 07:00	SK	BoP Current Account Balance	Aug	--	\$5513.2m	\$8706.1m	\$8671.6m
10/04/2016 07:50	JN	Monetary Base YoY	Sep	--	--	24.20%	--
10/04/2016 08:30	AU	ANZ Job Advertisements MoM	Sep	--	--	1.80%	--
10/04/2016 08:30	AU	Building Approvals MoM	Aug	-6.00%	--	11.30%	--
10/04/2016 08:30	AU	Building Approvals YoY	Aug	5.10%	--	3.10%	--
10/04/2016 10:00	SK	Foreign Direct Investments YoY	3Q	--	--	18.10%	--
10/04/2016 11:30	AU	RBA Cash Rate Target	Oct-04	1.50%	--	1.50%	--
10/04/2016 13:00	JN	Consumer Confidence Index	Sep	41.5	--	42	--
10/04/2016 13:30	AU	Commodity Index AUD	Sep	--	--	90.5	--
10/04/2016 13:30	AU	Commodity Index SDR YoY	Sep	--	--	0.80%	--
10/04/2016 16:30	UK	Markit/CIPS UK Cons. PMI	Sep	49	--	49.2	--
10/04/2016 17:00	EC	PPI MoM	Aug	-0.10%	--	0.10%	--
10/04/2016 17:00	EC	PPI YoY	Aug	-2.10%	--	-2.80%	--
10/04/2016 17:00	IN	RBI Repurchase Rate	Oct-04	6.50%	--	6.50%	--
10/04/2016 17:00	IN	RBI Reverse Repo Rate	Oct-04	6.00%	--	6.00%	--
10/04/2016 17:00	IN	RBI Cash Reserve Ratio	Oct-04	4.00%	--	4.00%	--
10/03/2016 10/07	ID	Foreign Reserves	Sep	--	--	\$113.54b	--

Source: Bloomberg

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