

Wednesday, October 05, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar terasa agak tertekan dengan adanya berita bahwa bank sentral Eropa, ECB, mungkin akan mengurangi kadar pembelian surat utang, yakni tapering, sebesar EUR10bn per bulan. Sementara itu, adanya komentar dari petinggi Fed bahwa kenaikan suku bunga pedoman AS bisa saja terjadi di bulan November, juga ikut berdampak kepada pasar.
- **Indonesia:** Departemen Keuangan menyatakan bahwa pemerintah sudah menerima 60% dari target tahunan untuk penghasilan pajak 2016, dan defisit anggaran diperkirakan masih berkisar di antara 2,5-2,7% PDB tahun ini.

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Analisa Sekilas

- **FX:** Dolar AS kembali bertahan di level terkuat dalam dua minggu belakangan terhadap mata uang major lainnya, dengan kembali adanya antisipasi pasar terhadap kenaikan suku bunga Federal Reserve.

Financial Market Indicators (Indonesia)

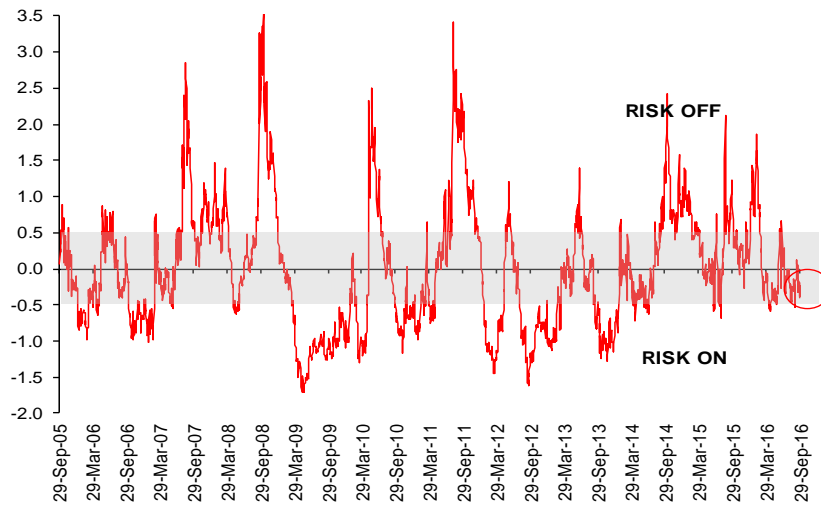
Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	12978	EUR-USD	1,1204	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14503,97	GBP-USD	1,2728	DJIA	18168,45	-85,40
GBP-IDR	16579,05	USD-JPY	102,90	Nasdaq	5289,66	-11,22
JPY-IDR	126,82	AUD-USD	0,7620	Nikkei 225	16735,65	136,98
AUD-IDR	9950,16	NZD-USD	0,7210	STI	2884,64	13,80
CAD-IDR	9864,96	USD-CAD	1,3192	KLCI	1661,25	8,70
SGD-IDR	9483,41	USD-CHF	0,9790	JCI	5472,32	8,40
MYR-IDR	3143,71	USD-NOK	8,0079	Baltic Dry	860,00	-4,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)			
O/N	4,75	1Y	6,17			
1 Minggu	5,28	2Y	6,59			
1 Bulan	6,20	5Y	6,81			
3 Bulan	7,05	10Y	7,00			
6 Bulan	7,28	15Y	7,27			
12 Bulan	7,51	20Y	7,36			

For reference only. Source: Bloomberg, OCBC Bank

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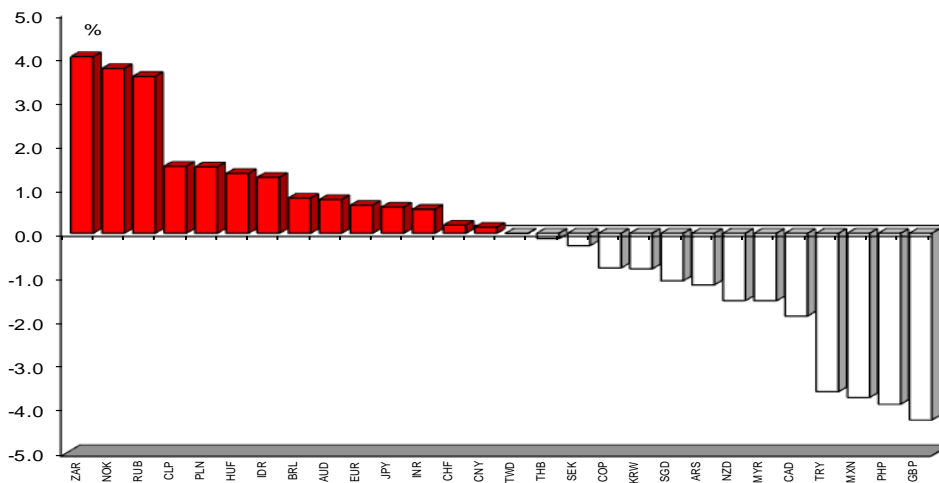
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date	Time	Event	Survey	Actual	Prior	Revised	
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	--	22.70%	24.20%	--
10/04/2016 08:30	AU	ANZ Job Advertisements MoM	Sep	--	-0.30%	1.80%	1.70%
10/04/2016 08:30	AU	Building Approvals MoM	Aug	-6.00%	-1.80%	11.30%	12.00%
10/04/2016 08:30	AU	Building Approvals YoY	Aug	5.10%	10.10%	3.10%	4.20%
10/04/2016 11:30	AU	RBA Cash Rate Target	Oct-04	1.50%	1.50%	1.50%	--
10/04/2016 13:30	AU	Commodity Index AUD	Sep	--	92.1	90.5	90
10/04/2016 13:30	AU	Commodity Index SDR YoY	Sep	--	3.10%	0.80%	0.30%
10/04/2016 16:30	UK	Markit/CIPS UK Cons. PMI	Sep	49	52.3	49.2	--
10/04/2016 17:00	EC	PPI MoM	Aug	-0.10%	-0.20%	0.10%	0.30%
10/04/2016 17:00	EC	PPI YoY	Aug	-2.10%	-2.10%	-2.80%	-2.60%
10/04/2016 17:00	IN	RBI Repurchase Rate	Oct-04	6.50%	6.25%	6.50%	--
10/04/2016 17:00	IN	RBI Reverse Repo Rate	Oct-04	6.00%	5.75%	6.00%	--
10/05/2016 07:00	SK	CPI MoM	Sep	0.20%	0.60%	-0.10%	--
10/05/2016 07:00	SK	CPI YoY	Sep	0.70%	1.20%	0.40%	--
10/05/2016 07:00	SK	CPI Core YoY	Sep	1.40%	1.30%	1.10%	--
10/05/2016 07:01	UK	BRC Shop Price Index YoY	Sep	--	-1.80%	-2.00%	--
10/05/2016 08:00	NZ	ANZ Commodity Price	Sep	--	--	3.20%	--
10/05/2016 08:30	SI	Nikkei Singapore PMI	Sep	--	--	52.3	--
10/05/2016 08:30	HK	Nikkei Hong Kong PMI	Sep	--	--	49	--
10/05/2016 08:30	JN	Nikkei Japan PMI Services	Sep	--	--	49.6	--
10/05/2016 08:30	JN	Nikkei Japan PMI Composite	Sep	--	--	49.8	--
10/05/2016 08:30	TA	CPI YoY	Sep	0.40%	--	0.57%	--
10/05/2016 08:30	AU	Retail Sales MoM	Aug	0.20%	--	0.00%	--
10/05/2016 09:00	PH	CPI YoY	Sep	2.10%	--	1.80%	--
10/05/2016 09:00	PH	CPI NSA MoM	Sep	0.00%	--	0.10%	--
10/05/2016 13:00	IN	Nikkei India PMI Services	Sep	--	--	54.7	--
10/05/2016 13:00	IN	Nikkei India PMI Composite	Sep	--	--	54.6	--
10/05/2016 15:45	IT	Markit/ADACI IT Services PMI	Sep	52	--	52.3	--
10/05/2016 15:45	IT	Markit/ADACI IT Composite PMI	Sep	51.5	--	51.9	--
10/05/2016 15:50	FR	Markit France Services PMI	Sep F	54.1	--	54.1	--
10/05/2016 15:50	FR	Markit France Composite PMI	Sep F	53.3	--	53.3	--
10/05/2016 15:55	GE	Markit Germany Services PMI	Sep F	50.6	--	50.6	--
10/05/2016 15:55	GE	Markit/BME GE Composite PMI	Sep F	52.7	--	52.7	--
10/05/2016 16:00	EC	Markit Eurozone Services PMI	Sep F	52.1	--	52.1	--
10/05/2016 16:00	EC	Markit EC Composite PMI	Sep F	52.6	--	52.6	--
10/05/2016 16:30	UK	Markit/CIPS UK Services PMI	Sep	52.2	--	52.9	--
10/05/2016 16:30	UK	Markit/CIPS UK Composite PMI	Sep	52.3	--	53.6	--
10/05/2016 17:00	EC	Retail Sales MoM	Aug	-0.30%	--	1.10%	--
10/05/2016 17:00	EC	Retail Sales YoY	Aug	1.50%	--	2.90%	--
10/05/2016 19:00	US	MBA Mortgage Applications	Sep-30	--	--	-0.70%	--
10/05/2016 20:15	US	ADP Employment Change	Sep	165k	--	177k	--
10/05/2016 20:30	US	Trade Balance	Aug	-\$39.2b	--	-\$39.5b	--
10/05/2016 20:30	CA	Int'l Merchandise Trade	Aug	-2.45b	--	-2.49b	--
10/05/2016 21:45	US	Markit US Services PMI	Sep F	51.9	--	51.9	--
10/05/2016 21:45	US	Markit US Composite PMI	Sep F	--	--	52	--
10/05/2016 22:00	US	ISM Non-Manf. Composite	Sep	53	--	51.4	--
10/05/2016 22:00	US	Factory Orders	Aug	-0.20%	--	1.90%	--
10/05/2016 22:00	US	Durable Goods Orders	Aug F	0.00%	--	0.00%	--

Source: Bloomberg

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