

Friday, March 24, 2017

## Ringkasan Utama

- Snapshot Global:** Sentimen pasar masih terasa was-wasan dengan ketidakpastian politik di AS, di mana proses legislasi penggantian Obamacare ditunda sampai besok, yang menyebabkan pasar kembali khawatir dengan kepastian agenda ekonomi oleh presiden Trump kedepannya. Hal ini kembali menekan sentimen pasar yang telah terbantu oleh harapan adanya "Trump Reflation Trade" melalui stimulus ekonomi dalam beberapa bulan belakangan.
- Indonesia:** Bank Indonesia menyatakan bahwa sedang membangun infrastruktur platform perniagaan elektronik untuk pasar mata uang dan pasar keuangan. Hal ini merupakan salah satu kebijakan dalam usaha BI untuk membangun sebuah sistem kliring counterparty sentral untuk kedepan, menurut laporan Bloomberg.

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## Analisa Sekilas

- FX:** USD kembali bergerak lesu terhadap mata uang major lainnya dengan masih belum jelasnya prospek legislatif AS.

## Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13325	EUR-USD	1,0783	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14363,52	GBP-USD	1,2521	DJIA	20656,58	-4,72
GBP-IDR	16635,55	USD-JPY	110,94	Nasdaq	5817,69	-3,95
JPY-IDR	120,06	AUD-USD	0,7627	Nikkei 225	19085,31	43,93
AUD-IDR	10175,49	NZD-USD	0,7029	STI	3126,93	8,74
CAD-IDR	9986,72	USD-CAD	1,3350	KLCI	1747,00	-1,30
SGD-IDR	9520,82	USD-CHF	0,9934	JCI	5563,76	29,67
MYR-IDR	3008,13	USD-NOK	8,4900	Baltic Dry	1196,00	6,00
JIBOR (Rupiah)				Obligasi Pemerintah (Govt Bonds)		
Tenor	Suku Bunga (%)	Tenor		Imbal Hasil (%)		
O/N	4,35	1Y		6,33		
1 Minggu	4,85	2Y		6,75		
1 Bulan	5,84	5Y		6,91		
3 Bulan	6,87	10Y		7,13		
6 Bulan	7,13	15Y		7,53		
12 Bulan	7,32	20Y		7,79		

For reference only. Source: Bloomberg, OCBC Bank

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### Key Economic Indicators

Date	Time	Event	Survey	Actual	Prior	Revised	
03/23/2017	04:00	NZ RBNZ Official Cash Rate	Mar-23	1.75%	1.75%	1.75%	--
03/23/2017	11:08	MU Visitor Arrivals	Feb	--	2495t	2876t	--
03/23/2017	13:00	SI CPI YoY	Feb	0.70%	0.70%	0.60%	--
03/23/2017	13:00	SI CPI NSA MoM	Feb	0.10%	0.00%	0.20%	--
03/23/2017	13:05	PH Budget Balance PHP	Jan	--	2.2b	-118.2b	--
03/23/2017	15:00	GE GfK Consumer Confidence	Apr	10	9.8	10	--
03/23/2017	15:45	FR Manufacturing Confidence	Mar	107	104	107	--
03/23/2017	15:45	FR Production Outlook Indicator	Mar	7	3	5	--
03/23/2017	16:00	TA Industrial Production YoY	Feb	10.00%	10.64%	2.77%	2.46%
03/23/2017	16:00	PH BSP Overnight Borrowing Rate	Mar-23	3.00%	3.00%	3.00%	--
03/23/2017	17:19	TA CBC Benchmark Interest Rate	Mar-23	1.38%	1.38%	1.38%	--
03/23/2017	17:30	UK Retail Sales Ex Auto Fuel MoM	Feb	0.30%	1.30%	-0.20%	-0.30%
03/23/2017	17:30	UK Retail Sales Ex Auto Fuel YoY	Feb	3.20%	4.10%	2.60%	2.10%
03/23/2017	17:30	UK Retail Sales Inc Auto Fuel MoM	Feb	0.40%	1.40%	-0.30%	-0.50%
03/23/2017	17:30	UK Retail Sales Inc Auto Fuel YoY	Feb	2.60%	3.70%	1.50%	1.00%
03/23/2017	20:00	IN BoP Current Account Balance	4Q	-\$12.00b	-\$7.90b	-\$3.40b	--
03/23/2017	20:30	US Initial Jobless Claims	Mar-18	240k	258k	241k	243k
03/23/2017	20:30	US Continuing Claims	Mar-11	2040k	2000k	2030k	2039k
03/23/2017	21:45	US Bloomberg Consumer Comfort	Mar-19	--	51.3	51	--
03/23/2017	22:00	US New Home Sales	Feb	564k	592k	555k	558k
03/23/2017	22:00	US New Home Sales MoM	Feb	1.60%	6.10%	3.70%	5.30%
03/23/2017	23:00	EC Consumer Confidence	Mar A	-5.9	-5	-6.2	--
03/23/2017	03/27	TH Car Sales	Feb	--	--	57254	--
03/23/2017	03/31	ID Local Auto Sales	Jan	--	--	86573	--
03/23/2017	03/31	ID Motorcycle Sales	Jan	--	--	437764	--
03/24/2017	05:00	SK Consumer Confidence	Mar	--	96.7	94.4	--
03/24/2017	05:45	NZ Trade Balance NZD	Feb	180m	-18m	-285m	-257m
03/24/2017	05:45	NZ Exports NZD	Feb	4.20b	4.01b	3.91b	--
03/24/2017	05:45	NZ Imports NZD	Feb	3.99b	4.02b	4.19b	4.16b
03/24/2017	05:45	NZ Trade Balance 12 Mth YTD NZD	Feb	-3655m	-3794m	-3468m	-3408m
03/24/2017	07:50	JN Japan Buying Foreign Bonds	Mar-17	--	--	-¥703.9b	--
03/24/2017	07:50	JN Japan Buying Foreign Stocks	Mar-17	--	--	-¥360.5b	--
03/24/2017	07:50	JN Foreign Buying Japan Bonds	Mar-17	--	--	-¥47.3b	--
03/24/2017	07:50	JN Foreign Buying Japan Stocks	Mar-17	--	--	-¥722.7b	--
03/24/2017	08:30	JN Nikkei Japan PMI Mfg	Mar P	--	--	53.3	--
03/24/2017	12:00	MA CPI YoY	Feb	3.90%	--	3.20%	--
03/24/2017	13:00	SI Industrial Production YoY	Feb	10.00%	--	2.20%	--
03/24/2017	13:00	SI Industrial Production SA MoM	Feb	1.20%	--	-6.00%	--
03/24/2017	13:00	JN Leading Index CI	Jan F	--	--	105.5	--
03/24/2017	13:00	JN Coincident Index	Jan F	--	--	114.9	--
03/24/2017	15:30	TH Foreign Reserves	Mar-17	--	--	\$180.0b	--
03/24/2017	15:45	FR GDP QoQ	4Q F	0.40%	--	0.40%	--
03/24/2017	15:45	FR GDP YoY	4Q F	1.20%	--	1.20%	--
03/24/2017	16:00	FR Markit France Mfg PMI	Mar P	52.4	--	52.2	--
03/24/2017	16:00	FR Markit France Services PMI	Mar P	56.1	--	56.4	--
03/24/2017	16:00	FR Markit France Comp PMI	Mar P	55.8	--	55.9	--
03/24/2017	16:30	GE Markit/BME Germany Mfg PMI	Mar P	56.5	--	56.8	--
03/24/2017	16:30	GE Markit Germany Services PMI	Mar P	54.5	--	54.4	--
03/24/2017	16:30	GE Markit/BME Germany Comp PMI	Mar P	56	--	56.1	--
03/24/2017	17:00	EC Markit Eurozone Mfg PMI	Mar P	55.3	--	55.4	--
03/24/2017	17:00	EC Markit Eurozone Services PMI	Mar P	55.3	--	55.5	--
03/24/2017	17:00	EC Markit Eurozone Comp PMI	Mar P	55.8	--	56	--
03/24/2017	17:30	UK BBA Loans for House Purchase	Feb	44900	--	44657	--
03/24/2017	20:30	CA CPI NSA MoM	Feb	0.20%	--	0.90%	--
03/24/2017	20:30	CA CPI YoY	Feb	2.10%	--	2.10%	--
03/24/2017	20:30	US Durable Goods Orders	Feb P	1.30%	--	2.00%	--
03/24/2017	20:30	US Durables Ex Transportation	Feb P	0.60%	--	0.00%	--
03/24/2017	20:30	US Cap Goods Orders Nondef Ex Air	Feb P	0.50%	--	-0.10%	--
03/24/2017	20:30	US Cap Goods Ship Nondef Ex Air	Feb P	0.20%	--	-0.40%	--
03/24/2017	21:45	US Markit US Mfg PMI	Mar P	54.8	--	54.2	--
03/24/2017	21:45	US Markit US Services PMI	Mar P	54	--	53.8	--
03/24/2017	21:45	US Markit US Comp PMI	Mar P	--	--	54.1	--
03/24/2017		VN CPI YoY	Mar	4.80%	--	5.02%	--

Source: Bloomberg

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