

Wednesday, April 26, 2017

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar terasa masih cukup suportif, dengan adanya hasil kinerja perusahaan besar AS, termasuk Caterpillar dan McDonald's, yang ditanggapi secara positif. Sementara itu, adanya rencana baru presiden Trump untuk menurunkan pajak perusahaan secara drastis juga ikut mendukung sentiment pasar.
- **Indonesia:** Menkeu Sri Mulyani menyatakan bahwa pemerintah tidak perlu untuk memangkas pengeluaran APBN tahun ini, tidak seperti tahun lalu. Menkeu menambahkan bahwa adanya momentum pertumbuhan ekonomi yang positif mendukung pendapatan negara tahun ini, sehingga belum perlu melakukan pemangkasan pengeluaran.

OCBC NISP
Treasury Advisory

Jakarta
021-25547288 / 252 / 255

Bandung
022-7159888

Surabaya
031-5358385 / 87

Medan
061-4518328
061-4518330
061-4552356

Analisa Sekilas

- **FX:** JPY melemah terhadap mata uang major lainnya dengan menurunnya permintaan safe haven.

Financial Market Indicators (Indonesia)

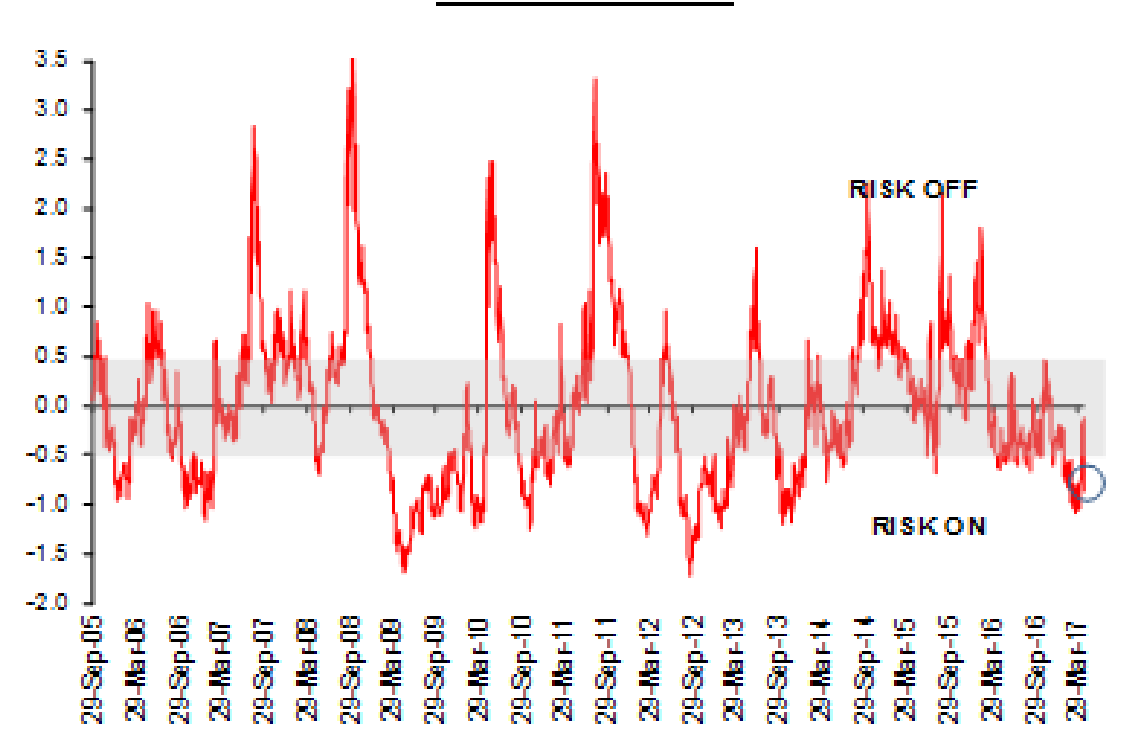
Nilai Mata Uang			Bursa Saham dan Komoditas			
				Nilai Indeks/Harga	Nett	
USD-IDR	13284	EUR-USD	1,0926	DJIA	20996,12	232,23
EUR-IDR	14468,75	GBP-USD	1,2842	Nasdaq	6025,49	41,67
GBP-IDR	17016,90	USD-JPY	111,09	Nikkei 225	19079,33	203,45
JPY-IDR	120,23	AUD-USD	0,7535	STI	3163,93	19,90
AUD-IDR	10008,03	NZD-USD	0,6952	KLCI	1765,80	9,75
CAD-IDR	9794,21	USD-CAD	1,3572	JCI	5680,80	16,32
SGD-IDR	9538,24	USD-CHF	0,9938	Baltic Dry	1154,00	-16,00
MYR-IDR	3038,77	USD-NOK	8,5614			
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)		Tenor	Imbal Hasil (%)		
O/N	4,36		1Y	6,16		
1 Minggu	4,83		2Y	6,57		
1 Bulan	5,87		5Y	6,72		
3 Bulan	6,85		10Y	7,07		
6 Bulan	7,09		15Y	7,47		
12 Bulan	7,28		20Y	7,75		

For reference only. Source: Bloomberg, OCBC Bank

OCBC Treasury
Research & Strategy
OCBC Bank, Singapore

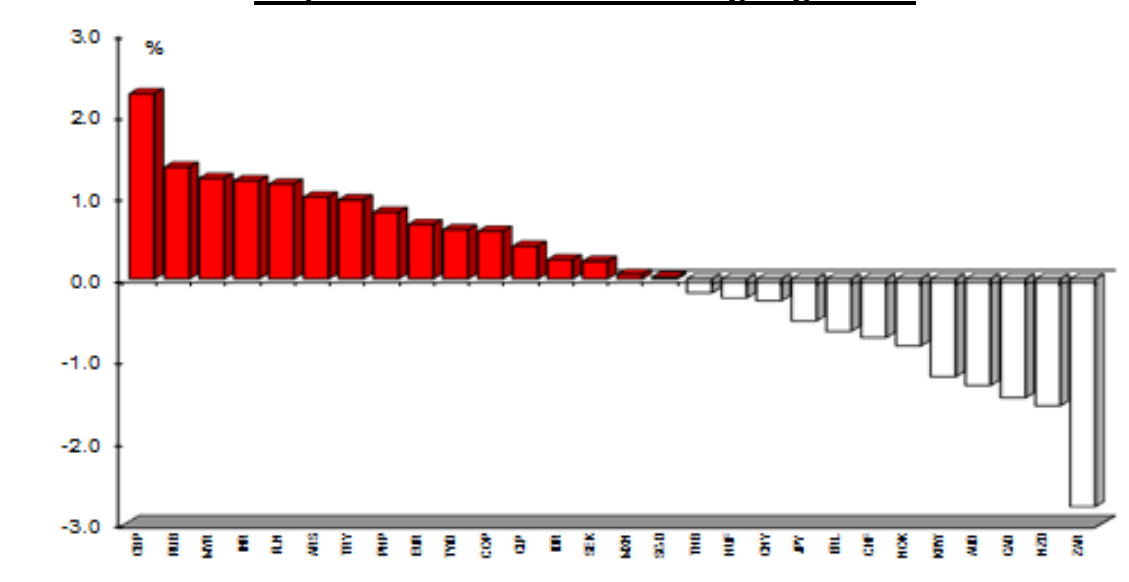
Wellian Wiranto
+65 6530-5949
WellianWiranto@ocbc.com

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	
04/25/2017	05:00	SK	Consumer Confidence	Apr	--	101.2	96.7	--
04/25/2017	07:50	JN	PPI Services YoY	Mar	0.70%	0.80%	0.80%	--
04/25/2017	14:45	FR	Manufacturing Confidence	Apr	105	108	104	105
04/25/2017	16:30	HK	Exports YoY	Mar	10.40%	16.90%	18.20%	--
04/25/2017	16:30	HK	Imports YoY	Mar	12.50%	13.00%	25.40%	--
04/25/2017	16:30	HK	Trade Balance HKD	Mar	-55.5b	-42.3b	-56.3b	--
04/25/2017	16:30	UK	Public Finances (PSNCR)	Mar	--	34.3b	12.9b	--
04/25/2017	16:30	UK	Public Sector Net Borrowing	Mar	1.5b	4.4b	1.1b	-0.7b
04/25/2017	16:30	UK	PSNB ex Banking Groups	Mar	3.1b	5.1b	1.8b	0.1b
04/25/2017	21:00	US	FHFA House Price Index MoM	Feb	0.40%	0.80%	0.00%	0.20%
04/25/2017	21:00	US	S&P CL CS 20-City YoY NSA	Feb	5.78%	5.85%	5.73%	5.66%
04/25/2017	21:00	US	S&P CL CS 20-City NSA Index	Feb	--	193.49	192.81	192.68
04/25/2017	21:00	US	S&P CL CS US HPI YoY NSA	Feb	--	5.76%	5.87%	5.64%
04/25/2017	21:00	US	S&P CL CS US HPI NSA Index	Feb	--	185.56	185.51	185.11
04/25/2017	22:00	US	New Home Sales	Mar	584k	621k	592k	587k
04/25/2017	22:00	US	New Home Sales MoM	Mar	-1.40%	5.80%	6.10%	0.30%
04/25/2017	22:00	US	Conf. Board Cons Confidence	Apr	122.5	120.3	125.6	124.9
04/25/2017	22:00	US	Richmond Fed Manufact. Index	Apr	16	20	22	--
04/26/2017	09:30	AU	CPI QoQ	1Q	0.60%	--	0.50%	--
04/26/2017	09:30	AU	CPI YoY	1Q	2.20%	--	1.50%	--
04/26/2017	09:30	AU	CPI Trimmed Mean QoQ	1Q	0.50%	--	0.40%	--
04/26/2017	09:30	AU	CPI Trimmed Mean YoY	1Q	1.80%	--	1.60%	--
04/26/2017	09:30	AU	CPI Weighted Median QoQ	1Q	0.50%	--	0.40%	--
04/26/2017	11:00	NZ	Credit Card Spending YoY	Mar	--	--	5.30%	--
04/26/2017	12:30	JN	All Ind Activity Index MoM	Feb	0.60%	--	0.10%	--
04/26/2017	13:00	SI	Industrial Production YoY	Mar	5.80%	--	12.60%	--
04/26/2017	13:00	SI	Industrial Production SA MoM	Mar	0.50%	--	-3.70%	--
04/26/2017	13:00	JN	Small Business Confidence	Apr	49.4	--	50.5	--
04/26/2017	14:00	JN	Machine Tool Orders YoY	Mar F	--	--	22.60%	--
04/26/2017	14:45	FR	Consumer Confidence	Apr	100	--	100	--
04/26/2017	16:00	SI	Automobile COE Open Bid Cat A	Apr-26	--	--	52000	--
04/26/2017	16:00	SI	Automobile COE Open Bid Cat B	Apr-26	--	--	54405	--
04/26/2017	16:00	SI	Automobile COE Open Bid Cat E	Apr-26	--	--	54556	--
04/26/2017	19:00	US	MBA Mortgage Applications	Apr-21	--	--	-1.80%	--
04/26/2017	20:30	CA	Retail Sales MoM	Feb	0.00%	--	2.20%	--
04/26/2017	20:30	CA	Retail Sales Ex Auto MoM	Feb	-0.30%	--	1.70%	--
04/26/2017	04:28	VN	CPI YoY	Apr	4.62%	--	4.65%	--
04/26/2017	04:30	VN	Imports YTD YoY	Apr	--	--	22.40%	--
04/26/2017	04:30	VN	Exports YTD YoY	Apr	--	--	12.80%	--
04/25/2017	04:28	TH	Car Sales	Mar	--	--	68435	--
04/26/2017	04:28	PH	Budget Balance PHP	Mar	--	--	-23.7b	--

Source: Bloomberg

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