

Tuesday, September 27, 2016

## Ringkasan Utama

- **Snapshot Global:** Sentimen pasar agak melemah dengan kembali munculnya kekhawatiran pasar terhadap situasi salah satu bank besar Jerman, Deutsche Bank, setelah Kanselir Merkel diberitakan tidak akan menggunakan dana pemerintah untuk membantu bank tersebut.

Sementara itu, pasar juga akan mencermati adanya debat antara kedua kandidat presiden AS, yakni Hillary Clinton dan Donald Trump pagi ini. Dengan semakin dekatnya tanggal pemilu, yaitu 8 November, dan juga semakin dekatnya popularitas kedua kandidat tersebut, pasar akan fokus kepada persepsi terhadap kedua kandidat tersebut setelah debat.

- **Indonesia:** Pemerintah mencapai 55% dari target penerimaan non-migas tahun ini, dengan bantuan dari program tax amnesty. Dalam masa yang sama tahun lalu, pemerintah hanya mencapai 49% dari target tahunan. Sementara itu, Menkeu Sri Mulyani dijadwalkan akan mengadakan konferensi pers pada hari Jumat untuk memberikan update tentang kadar sukses program tax amnesty tersebut.

## Analisa Sekilas

- **FX:** Japanese Yen menguat terhadap mata uang major lainnya, mendekati level 100 terhadap USD contohnya, dengan meningkatnya permintaan safe haven pasar global.

## Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	13041	EUR-USD	1,1199	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14656,69	GBP-USD	1,2975	DJIA	18094,83	-166,62
GBP-IDR	16863,91	USD-JPY	100,33	Nasdaq	5257,49	-48,26
JPY-IDR	129,63	AUD-USD	0,7636	Nikkei 225	16785,51	0,00
AUD-IDR	9993,21	NZD-USD	0,7278	STI	2849,94	-7,01
CAD-IDR	10018,82	USD-CAD	1,3073	KLCI	1669,50	-1,49
SGD-IDR	9577,95	USD-CHF	0,9692	JCI	5352,14	-36,77
MYR-IDR	3155,41	USD-NOK	8,1089	Baltic Dry	934,00	-7,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)			
O/N	4,78	1Y	6,17			
1 Minggu	5,27	2Y	6,49			
1 Bulan	6,09	5Y	6,73			
3 Bulan	7,04	10Y	6,91			
6 Bulan	7,39	15Y	7,21			
12 Bulan	7,66	20Y	7,34			

For reference only. Source: Bloomberg, OCBC Bank

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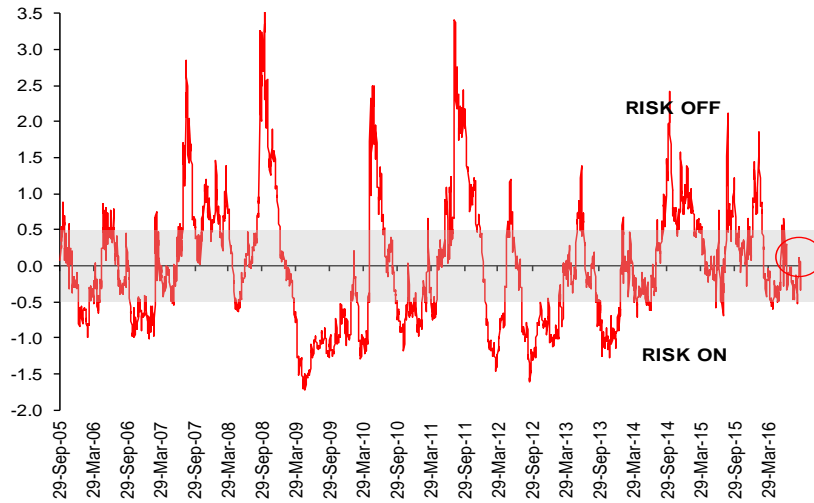
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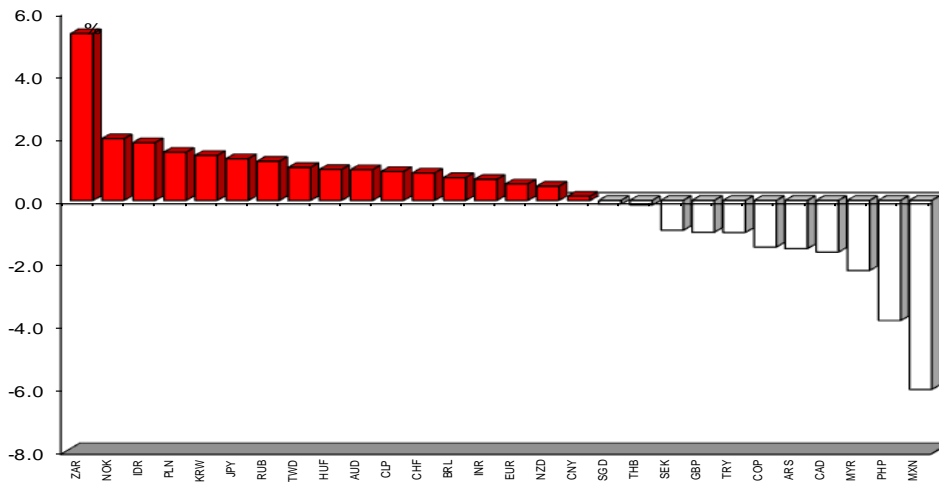
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**FX Sentiment Index**



Source: OCBC Bank

**FX performance: 1-month change agst USD**



Source: Bloomberg

### Key Economic Indicators

Date Time	Event	Survey	Actual	Prior	Revised	
<b>09/26/2016 05:45</b>	<b>NZ Trade Balance</b>	<b>Aug</b>	<b>-735m</b>	<b>-1265m</b>	<b>-433m</b>	<b>-351m</b>
09/26/2016 05:45	NZ Exports	Aug	3.60b	3.39b	3.96b	3.97b
09/26/2016 05:45	NZ Imports	Aug	4.30b	4.65b	4.40b	4.32b
<b>09/26/2016 11:30</b>	<b>TH Customs Exports YoY</b>	<b>Aug</b>	<b>-1.00%</b>	<b>6.54%</b>	<b>-6.38%</b>	<b>--</b>
09/26/2016 11:30	TH Customs Imports YoY	Aug	-4.00%	-1.48%	-7.20%	-7.16%
09/26/2016 11:30	TH Customs Trade Balance	Aug	\$1267m	\$2128m	\$1213m	\$843m
<b>09/26/2016 13:00</b>	<b>SI Industrial Production YoY</b>	<b>Aug</b>	<b>0.50%</b>	<b>0.10%</b>	<b>-3.60%</b>	<b>-3.50%</b>
09/26/2016 13:00	SI Industrial Production SA MoM	Aug	1.80%	0.00%	-4.00%	-3.90%
09/26/2016 13:00	JN Leading Index CI	Jul F	--	100	100	--
<b>09/26/2016 16:00</b>	<b>GE IFO Business Climate</b>	<b>Sep</b>	<b>106.3</b>	<b>109.5</b>	<b>106.2</b>	<b>106.3</b>
<b>09/26/2016 16:00</b>	<b>GE IFO Current Assessment</b>	<b>Sep</b>	<b>112.9</b>	<b>114.7</b>	<b>112.8</b>	<b>112.9</b>
<b>09/26/2016 16:00</b>	<b>GE IFO Expectations</b>	<b>Sep</b>	<b>100.1</b>	<b>104.5</b>	<b>100.1</b>	<b>--</b>
<b>09/26/2016 16:00</b>	<b>IT Retail Sales MoM</b>	<b>Jul</b>	<b>0.00%</b>	<b>-0.30%</b>	<b>0.20%</b>	<b>0.30%</b>
09/26/2016 16:00	IT Retail Sales YoY	Jul	0.30%	-0.20%	0.80%	--
09/26/2016 16:30	UK BBA Loans for House Purchase	Aug	37100	36997	37662	37672
<b>09/26/2016 22:00</b>	<b>US New Home Sales</b>	<b>Aug</b>	<b>600k</b>	<b>609k</b>	<b>654k</b>	<b>659k</b>
09/26/2016 22:00	US New Home Sales MoM	Aug	-8.30%	-7.60%	12.40%	13.80%
09/26/2016 22:30	US Dallas Fed Manf. Activity	Sep	-2.5	-3.7	-6.2	--
09/27/2016 14:00	GE Import Price Index MoM	Aug	-0.10%	--	0.10%	--
09/27/2016 14:00	GE Import Price Index YoY	Aug	-2.50%	--	-3.80%	--
<b>09/27/2016 16:00</b>	<b>EC M3 Money Supply YoY</b>	<b>Aug</b>	<b>4.90%</b>	<b>--</b>	<b>4.80%</b>	<b>4.80%</b>
09/27/2016 16:00	TA Industrial Production YoY	Aug	4.00%	--	-0.31%	--
09/27/2016 16:00	IT Industrial Orders MoM	Jul	--	--	-2.80%	--
09/27/2016 16:00	IT Industrial Orders NSA YoY	Jul	--	--	-4.20%	--
<b>09/27/2016 16:30</b>	<b>HK Exports YoY</b>	<b>Aug</b>	<b>-2.00%</b>	<b>--</b>	<b>-5.10%</b>	<b>--</b>
09/27/2016 16:30	HK Imports YoY	Aug	-1.00%	--	-3.30%	--
09/27/2016 16:30	HK Trade Balance	Aug	-30.0b	--	-33.3b	--
09/27/2016 21:45	US Markit US Services PMI	Sep P	51.2	--	51	--
09/27/2016 21:45	US Markit US Composite PMI	Sep P	--	--	51.5	--
<b>09/27/2016 22:00</b>	<b>US Consumer Confidence Index</b>	<b>Sep</b>	<b>99</b>	<b>--</b>	<b>101.1</b>	<b>--</b>
09/27/2016 22:00	US Richmond Fed Manufact. Index	Sep	-2	--	-11	--
<b>09/27/2016</b>	<b>MU Unemployment Rate</b>	<b>Aug</b>	<b>--</b>	<b>--</b>	<b>1.90%</b>	<b>--</b>

Source: Bloomberg

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