

Wednesday, September 28, 2016

Ringkasan Utama

- Snapshot Global:** Sentimen pasar terasa agak membaik dengan adanya persepsi bahwa Hillary Clinton lebih unggul dibandingkan Donald Trump dalam perdebatan resmi kedua kandidat presiden AS kemarin tersebut. Hal ini menyebabkan pelaku pasar mengurangkan kekhawatiran bahwa Trump akan memenangi pemilu 8 November nanti. Sementara itu, pasar juga mencermati berita tentang OPEC, di mana ternyata belum ada kesepakatan tentang pembekuan kadar produksi minyak. Dengan begitu, harga minyak bumi dunia kembali melemah, dengan WTI di bawah level USD 45 per barel.
- Indonesia:** Pemerintah melihat bahwa pertumbuhan ekonomi Indonesia akan berada di sekitar level 5,0% tahun ini, sebelum meningkat ke level 5,1% tahun depan. Menkeu Sri Mulyani menyatakan bahwa kestabilan inflasi akan mendukung pertumbuhan konsumsi rumah tangga di H2 tahun ini. Sementara itu, Menkeu juga menambahkan bahwa pemerintah telah menerima penghasilan pajak sebesar IDR64tn melalui program tax amnesty.

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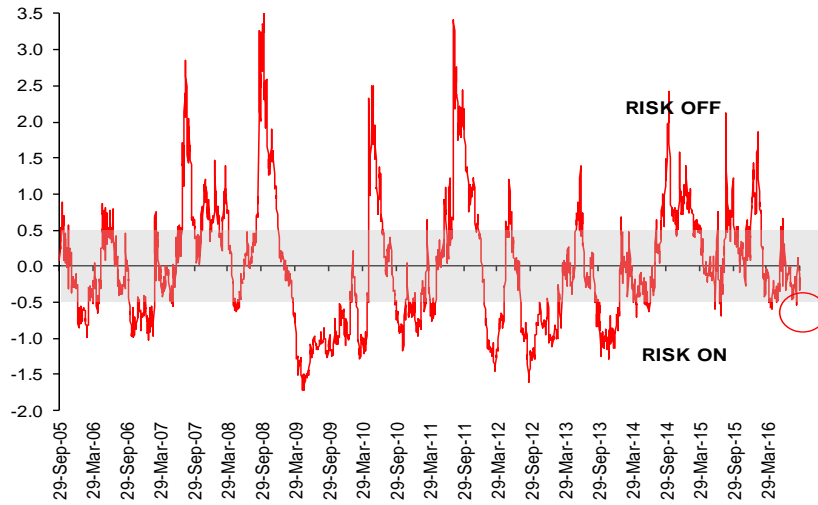
- FX:** Rupiah menguat ke bawah level 13000 terhadap USD kemarin, dengan adanya pemulihan sentimen global setelah debat kepresidenan AS perdana kemarin, dan juga adanya data yang menunjukkan bahwa arus partisipasi tax amnesty semakin menguat.

Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	12955	EUR-USD	1,1215	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14551,00	GBP-USD	1,3023	DJIA	18228,30	133,47
GBP-IDR	16788,41	USD-JPY	100,43	Nasdaq	5305,71	48,22
JPY-IDR	128,83	AUD-USD	0,7667	Nikkei 225	16683,93	139,37
AUD-IDR	9935,48	NZD-USD	0,7301	STI	2860,23	10,29
CAD-IDR	9792,18	USD-CAD	1,3196	KLCI	1664,72	-4,78
SGD-IDR	9517,12	USD-CHF	0,9708	JCI	5419,60	67,47
MYR-IDR	3140,23	USD-NOK	8,1154	Baltic Dry	930,00	-4,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)			
O/N	5,39	1Y	6,15			
1 Minggu	5,50	2Y	6,50			
1 Bulan	6,16	5Y	6,75			
3 Bulan	7,08	10Y	6,91			
6 Bulan	7,30	15Y	7,23			
12 Bulan	7,52	20Y	7,36			

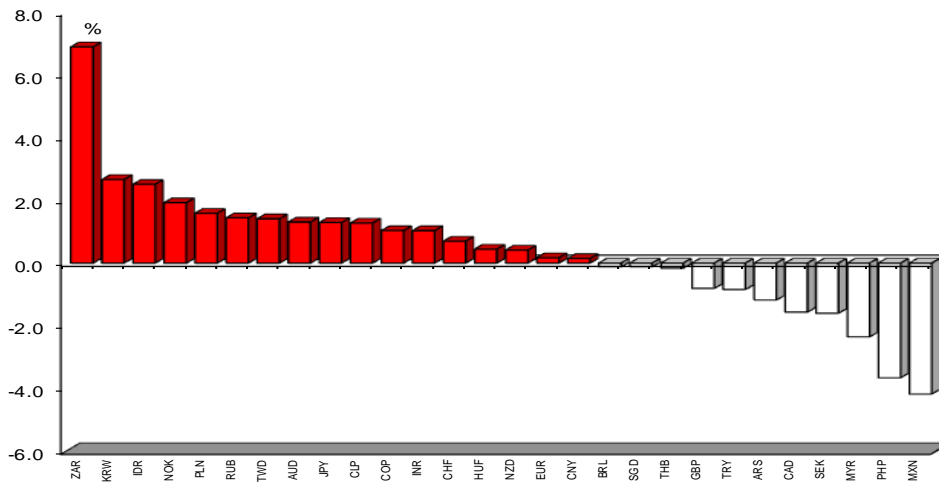
For reference only. Source: Bloomberg, OCBC Bank

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	
09/27/2016 11:31	MU Unemployment Rate	Aug	--	1.90%	1.90%	--
09/27/2016 14:00	GE Import Price Index MoM	Aug	-0.10%	-0.20%	0.10%	--
09/27/2016 14:00	GE Import Price Index YoY	Aug	-2.50%	-2.60%	-3.80%	--
09/27/2016 16:00	EC M3 Money Supply YoY	Aug	4.90%	5.10%	4.80%	4.90%
09/27/2016 16:00	TA Industrial Production YoY	Aug	4.00%	7.74%	-0.31%	-0.36%
09/27/2016 16:00	IT Industrial Orders MoM	Jul	--	-10.80%	-2.80%	--
09/27/2016 16:00	IT Industrial Orders NSA YoY	Jul	--	-11.80%	-4.20%	--
09/27/2016 16:30	HK Exports YoY	Aug	-2.00%	0.80%	-5.10%	--
09/27/2016 16:30	HK Imports YoY	Aug	-1.00%	2.80%	-3.30%	--
09/27/2016 16:30	HK Trade Balance	Aug	-30.0b	-32.1b	-33.3b	--
09/27/2016 21:45	US Markit US Services PMI	Sep P	51.2	51.9	51	--
09/27/2016 21:45	US Markit US Composite PMI	Sep P	--	52	51.5	--
09/27/2016 22:00	US Consumer Confidence Index	Sep	99	104.1	101.1	101.8
09/27/2016 22:00	US Richmond Fed Manufact. Index	Sep	-2	-8	-11	--
09/28/2016 13:00	JN Small Business Confidence	Sep	46.9	--	46.3	--
09/28/2016 14:00	GE GfK Consumer Confidence	Oct	10.2	--	10.2	--
09/28/2016 14:45	FR Consumer Confidence	Sep	97	--	97	--
09/28/2016 16:00	IT Consumer Confidence Index	Sep	109	--	109.2	--
09/28/2016 16:00	IT Manufacturing Confidence	Sep	100.9	--	101.1	--
09/28/2016 16:00	IT Economic Sentiment	Sep	--	--	99.4	--
09/28/2016 19:00	US MBA Mortgage Applications	Sep-23	--	--	-7.30%	--
09/28/2016 20:30	US Durable Goods Orders	Aug P	-1.50%	--	4.40%	--
09/28/2016 20:30	US Durables Ex Transportation	Aug P	-0.50%	--	1.30%	--
09/28/2016 20:30	US Cap Goods Orders Nondef Ex Air	Aug P	-0.10%	--	1.50%	--
09/28/2016 20:30	US Cap Goods Ship Nondef Ex Air	Aug P	0.10%	--	-0.50%	--

Source: Bloomberg

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