Ringkasan Harian Pasar Finansial

OCBC Bank

Monday, February 01, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar terbantu dengan adanya aksi penambahan stimulus moneter dari Bank of Japan, di mana salah satu suku bunga untuk perbankan diturunkan menjadi negatif. Pasar saham AS pun ikut terbawa sentimen positif tersebut, dengan Dow Jones dan S&P 500 naik sekitar 2,5% pada hari Jumat.

- **Indonesia:** Inflasi bulan Januari akan diumumkan hari ini. Kami menganggap bahwa ada kemungkinan data inflasi akan menunjukkan kenaikan dari 3, 35% yoy bulan sebelumnya menjadi 4,4%. Hal ini dikarenakan adanya kenaikan harga pangan setelah cuaca buruk merusak hasil panen dan juga merumitkan jalur distribusi terutama antar pulau.

Analisa Sekilas

- **FX:** JPY menglemah setelah adanya aksi surprise dari BOJ pada hari Jumat. USDJPY naik ke atas level 120, dan bergerak di sekitar 121,25 pagi ini.

Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13778	**EUR-USD**	1,0831	**Index**	**Nilai Indeks/Harga**	**Nett**
EUR-IDR	15012,74	**GBP-USD**	1,4244	**DJIA**	16466,30	396,66
GBP-IDR	19791,85	**USD-JPY**	121,14	**Nasdaq**	4613,95	107,28
JPY-IDR	114,02	**AUD-USD**	0,7084	**Nikkei 225**	17518,30	476,85
AUD-IDR	9789,91	**NZD-USD**	0,6484	**STI**	2629,11	66,66
CAD-IDR	9830,62	**USD-CAD**	1,3976	**KLCI**	1667,80	33,27
SGD-IDR	9677,82	**USD-CHF**	1,0231	**JCI**	4615,16	12,33
MYR-IDR	3322,12	**USD-NOK**	8,6789	**Baltic Dry**	317,00	-8,00

JIBOR (Rupiah)		Obligasi Pemerintah (Govt Bonds)	
Tenor	**Suku Bunga (%)**	**Tenor**	**Imbal Hasil (%)**
O/N	5,41	1Y	7,09
1 Minggu	6,11	2Y	7,98
1 Bulan	7,80	5Y	8,24
3 Bulan	8,46	10Y	8,26
6 Bulan	8,67	15Y	8,54
12 Bulan	8,82	20Y	8,61

For reference only. Source: Bloomberg, OCBC Bank

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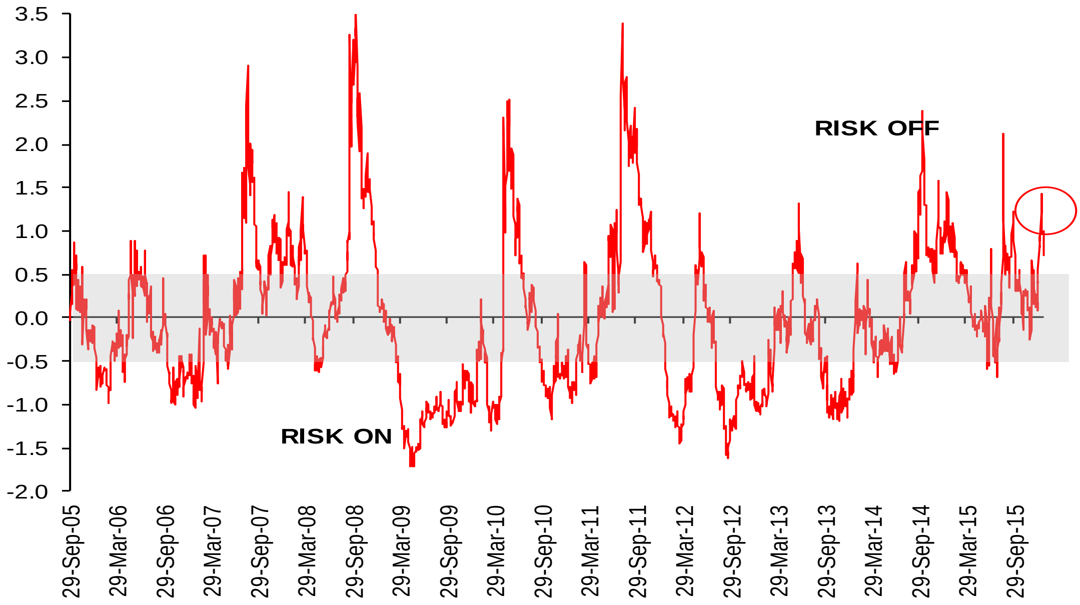
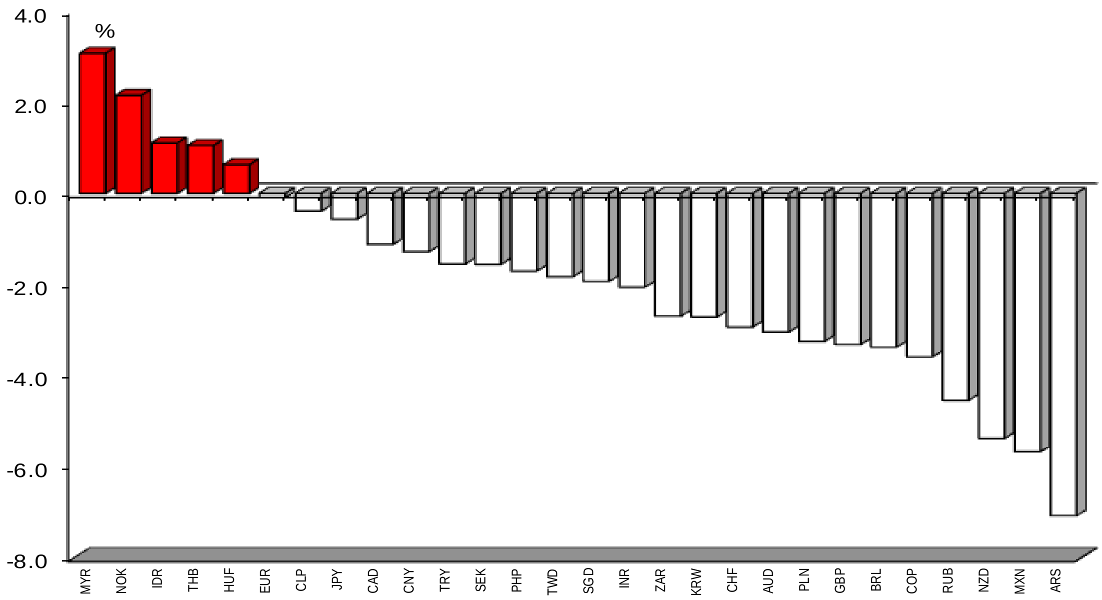
FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time		Event		Survey	Actual	Prior	Revised
01/29/2016 05:45	NZ	Building Permits MoM	Dec	--	2.30%	1.80%	2.40%
01/29/2016 07:00	SK	Industrial Production SA MoM	Dec	-0.30%	1.30%	-2.10%	--
01/29/2016 07:00	SK	Industrial Production YoY	Dec	-3.30%	-1.90%	-0.30%	-0.10%
01/29/2016 07:30	JN	Jobless Rate	Dec	3.30%	3.30%	3.30%	--
01/29/2016 07:30	JN	Job-To-Applicant Ratio	Dec	1.26	1.27	1.25	--
01/29/2016 07:30	JN	Natl CPI YoY	Dec	0.20%	0.20%	0.30%	--
01/29/2016 07:30	JN	Tokyo CPI YoY	Jan	0.00%	-0.30%	0.00%	0.10%
01/29/2016 07:50	JN	Industrial Production MoM	Dec P	-0.30%	-1.40%	-0.90%	--
01/29/2016 08:30	TA	GDP YoY	4Q	-0.60%	-0.28%	-0.63%	--
01/29/2016 10:00	NZ	Money Supply M3 YoY	Dec	--	8.10%	8.40%	--
01/29/2016 13:00	JN	Housing Starts YoY	Dec	0.50%	-1.30%	1.70%	--
01/29/2016 14:30	FR	GDP YoY	4Q A	1.20%	1.30%	1.10%	--
01/29/2016 15:00	GE	Retail Sales MoM	Dec	0.40%	-0.20%	0.20%	0.40%
01/29/2016 15:30	TH	Exports YoY	Dec	--	-9.10%	-6.60%	--
01/29/2016 15:30	TH	BoP Current Account Balance	Dec	$4360m	$4879m	$2997m	--
01/29/2016 15:45	FR	CPI YoY	Jan P	0.30%	0.20%	0.20%	--
01/29/2016 17:00	EC	M3 Money Supply YoY	Dec	5.20%	4.70%	5.10%	5.00%
01/29/2016 18:00	EC	CPI Core YoY	Jan A	0.90%	1.00%	0.90%	--
01/29/2016 21:30	US	Employment Cost Index	4Q	0.60%	0.60%	0.60%	--
01/29/2016 21:30	US	GDP Annualized QoQ	4Q A	0.80%	0.70%	2.00%	--
01/29/2016 21:30	US	Personal Consumption	4Q A	1.80%	2.20%	3.00%	--
01/29/2016 21:30	US	GDP Price Index	4Q A	0.80%	0.80%	1.30%	--
01/29/2016 21:30	US	Core PCE QoQ	4Q A	1.20%	1.20%	1.40%	--
01/29/2016 22:45	US	Chicago Purchasing Manager	Jan	45.3	55.6	42.9	--
01/29/2016 23:00	US	U. of Mich. Sentiment	Jan F	93	92	93.3	--
02/01/2016 06:30	AU	AiG Perf of Mfg Index	Jan	--	51.5	51.9	--
02/01/2016 07:00	SK	BoP Current Account Balance	Dec	--	$7459.5m	$9404.4m	$9910.3m
02/01/2016 07:30	AU	TD Securities Inflation MoM	Jan	--	0.40%	0.20%	--
02/01/2016 09:00	CH	Manufacturing PMI	Jan	49.6	--	49.7	--
02/01/2016 09:30	SK	Nikkei South Korea PMI Mfg	Jan	--	--	50.7	--
02/01/2016 09:45	CH	Caixin China PMI Mfg	Jan	48.1	--	48.2	--
02/01/2016 10:00	JN	Nikkei Japan PMI Mfg	Jan F	--	--	52.4	--
02/01/2016 10:30	TA	Nikkei Taiwan PMI Mfg	Jan	--	--	51.7	--
02/01/2016 11:00	ID	Nikkei Indonesia PMI Mfg	Jan	--	--	47.8	--
02/01/2016 11:00	TH	CPI YoY	Jan	-0.46%	--	-0.85%	--
02/01/2016 11:00	TH	CPI Core YoY	Jan	0.56%	--	0.68%	--
02/01/2016 12:00	VN	Nikkei Vietnam PMI Mfg	Jan	--	--	51.3	--
02/01/2016 13:00	IN	Nikkei India PMI Mfg	Jan	--	--	49.1	--
02/01/2016 13:00	JN	Vehicle Sales YoY	Jan	--	--	3.10%	--
02/01/2016 13:30	AU	Commodity Index AUD	Jan	--	--	71.2	--
02/01/2016 13:30	AU	Commodity Index YoY	Jan	--	--	-23.30%	--
02/01/2016 16:45	IT	Markit/ADACI Italy Manufacturing PMI	Jan	54.8	--	55.6	--
02/01/2016 16:50	FR	Markit France Manufacturing PMI	Jan F	50	--	50	--
02/01/2016 16:55	GE	Markit/BME Germany Manufacturing PMI	Jan F	52.1	--	52.1	--
02/01/2016 17:00	EC	Markit Eurozone Manufacturing PMI	Jan F	52.3	--	52.3	--
02/01/2016 17:30	UK	Mortgage Approvals	Dec	69.6k	--	70.4k	--
02/01/2016 17:30	UK	Markit UK PMI Manufacturing SA	Jan	51.6	--	51.9	--
02/01/2016 21:30	US	Personal Income	Dec	0.20%	--	0.30%	--
02/01/2016 22:45	US	Markit US Manufacturing PMI	Jan F	52.7	--	52.7	--
02/01/2016 23:00	US	ISM Manufacturing	Jan	48.5	--	48.2	48
02/01/2016 23:00	US	ISM Prices Paid	Jan	35	--	33.5	--
02/01/2016 23:00	US	Construction Spending MoM	Dec	0.60%	--	-0.40%	--
02/01/2016	ID	CPI NSA MoM	Jan	0.66%	--	0.96%	--

Source: Bloomberg

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