Ringkasan Harian Pasar Finansial

OCBC Bank

Tuesday, January 03, 2017

Ringkasan Utama

- **Snapshot Global:** Selamat Tahun Baru! Semoga tahun 2017 akan lebih stabil dan akan berkurang dalam perkembangan politik global mendadak seperti tahun lalu. Untuk hari kerja pertama ini, pasar akan memberikan perhatian kepada keputusan China untuk mengrevisi basket mata uang CFETS mereka, untuk mencangkum 24 mata uang asing, dibandingkan 13 sebelumnya. Bobot USD diturunkan dari 26,4% menjadi 22,4%. Sementara itu, pasar juga akan fokus kepada adanya data PDB Q4 Singapura yang mencetak 1,8% yoy, jauh lebih bagus daripada antisipasi pasar.

- **Indonesia:** Indeks PMI Manufacturing untuk bulan Desember, seperti yang dikumpulkan oleh Nikkei dan Markit, mencetak level 49, lebih rendah dari 49,7 di bulan November dan juga menunjukkan bahwa sentimen sektor manufaktur masih dalam tahap menyusut.

Analisa Sekilas

- **FX:** Rupiah bertahan di sekitar level 13475 terhadap dolar AS, dengan adanya sentimen wait-and-see pasar global terhadap perkembangan ekonomi di AS, menjelang pengumuman data ISM dan juga minutes dari rapat FOMC bulan Desember pada minggu ini.

Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13473	EUR-USD	1,0455	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14162,80	GBP-USD	1,2278	DJIA	19762,60	0,00
GBP-IDR	16653,15	USD-JPY	117,55	Nasdaq	5383,12	0,00
JPY-IDR	114,92	AUD-USD	0,7184	Nikkei 225	19114,37	0,00
AUD-IDR	9668,81	NZD-USD	0,6924	STI	2880,76	0,00
CAD-IDR	10058,90	USD-CAD	1,3443	KLCI	1641,73	0,00
SGD-IDR	9308,05	USD-CHF	1,0235	JCI	5296,71	0,00
MYR-IDR	3003,06	USD-NOK	8,6596	Baltic Dry	961,00	0,00

JIBOR (Rupiah)		Obligasi Pemerintah (Govt Bonds)	
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)
O/N	4,23	1Y	6,93
1 Minggu	6,49	2Y	7,47
1 Bulan	7,80	5Y	7,58
3 Bulan	7,46	10Y	7,97
6 Bulan	7,46	15Y	8,20
12 Bulan	7,56	20Y	8,20

For reference only. Source: Bloomberg, OCBC Bank

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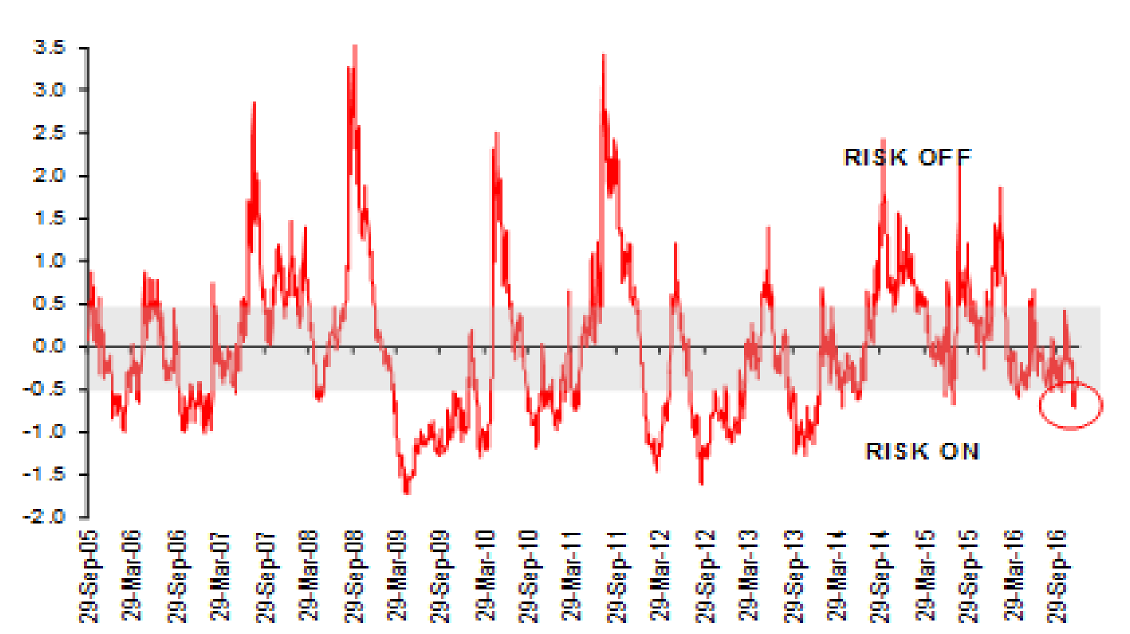
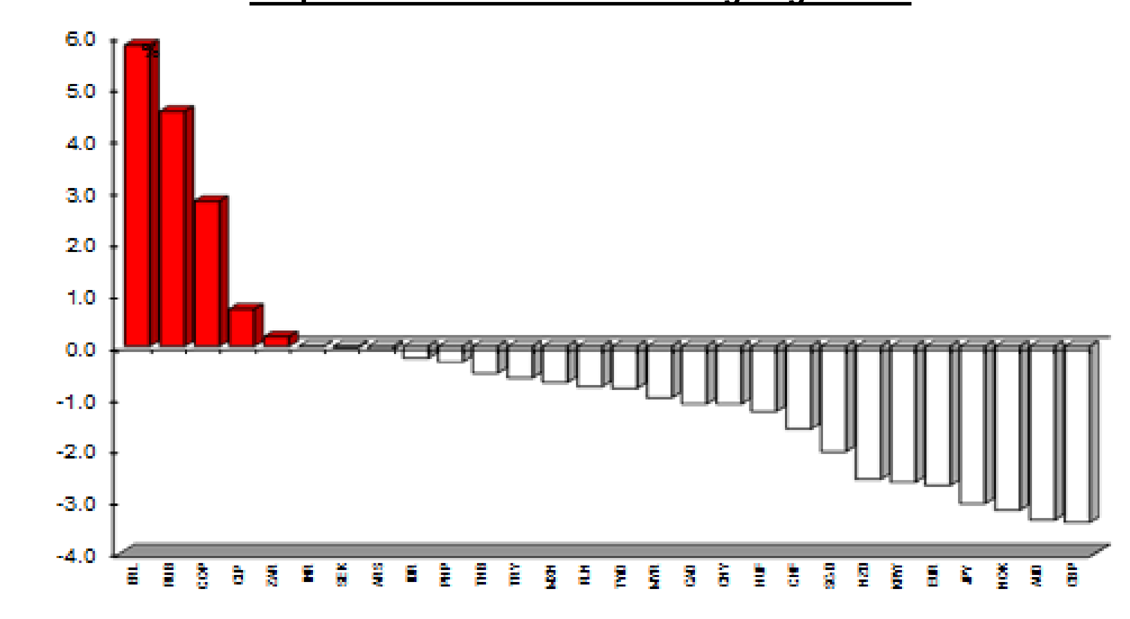
FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time		Event		Survey	Actual	Prior	Revised
12/30/2016 07:00	SK	CPI MoM	Dec	0.20%	0.10%	-0.10%	--
12/30/2016 07:00	SK	CPI YoY	Dec	1.30%	1.30%	1.30%	1.50%
12/30/2016 08:30	AU	Private Sector Credit MoM	Nov	0.005	0.005	0.005	--
12/30/2016 11:43	MU	Trade Balance	Nov	--	-6027m	-5326m	-5272m
12/30/2016 15:30	TH	Foreign Reserves	45261	--	$172.3b	$172.6b	--
12/30/2016 15:30	TH	Exports YoY	Nov	--	10.10%	-4.30%	--
12/30/2016 15:30	TH	Imports YoY	Nov	--	2.50%	7.40%	--
12/30/2016 15:30	TH	Trade Balance	Nov	--	$2791m	$1794m	--
12/30/2016 15:30	TH	BoP Current Account Balance	Nov	$2600m	$3195m	$2875m	--
12/30/2016 16:30	HK	Money Supply M2 HKD YoY	Nov	--	8.70%	8.10%	--
12/30/2016 17:00	IT	PPI YoY	Nov	--	-0.30%	-0.70%	-0.60%
12/30/2016 22:45	US	Chicago Purchasing Manager	Dec	56.8	54.6	57.6	--
01/01/2017 08:00	SK	Exports YoY	Dec	4.60%	6.40%	2.70%	0.025
01/01/2017 08:00	SK	Imports YoY	Dec	5.40%	7.30%	10.10%	0.093
01/01/2017 08:00	SK	Trade Balance	Dec	$7050m	$7003m	$8003m	$8199m
01/01/2017 09:00	CH	Manufacturing PMI	Dec	5150.00%	5140.00%	5170.00%	--
01/01/2017 09:00	CH	Non-manufacturing PMI	Dec	--	5450.00%	5470.00%	--
01/02/2017 08:30	SK	Nikkei South Korea PMI Mfg	Dec	--	4940.00%	4800.00%	--
01/02/2017 13:00	IN	Nikkei India PMI Mfg	Dec	--	4960.00%	5230.00%	--
01/02/2017 16:45	IT	Markit/Italy PMI Mfg	Dec	5230.00%	5320.00%	5220.00%	--
01/02/2017 16:50	FR	Markit France Mfg PMI	Dec F	5350.00%	5350.00%	5350.00%	--
01/02/2017 16:55	GE	Markit/BME Germany PMI Mfg	Dec F	5550.00%	5560.00%	5550.00%	--
01/02/2017 17:00	EC	Markit Eurozone PMI Mfg	Dec F	5490.00%	5490.00%	5490.00%	--
01/03/2017 06:30	AU	AiG Perf of Mfg Index	Dec	--	5540.00%	5420.00%	--
01/03/2017 08:00	SI	GDP YoY	4Q A	0.003	0.018	0.011	0.012
01/03/2017 08:00	SI	GDP SAAR QoQ	4Q A	4.00%	9.10%	-2.00%	-1.90%
01/03/2017 08:30	ID	Nikkei Indonesia PMI Mfg	Dec	--	--	4970.00%	--
01/03/2017 08:30	VN	Nikkei Vietnam PMI Mfg	Dec	--	--	5400.00%	--
01/03/2017 08:30	TA	Nikkei Taiwan PMI Mfg	Dec	--	--	5470.00%	--
01/03/2017 09:45	CH	Caixin China PMI Mfg	Dec	5090.00%	--	5090.00%	--
01/03/2017 13:30	AU	Commodity Index SDR YoY	Dec	--	--	32.10%	--
01/03/2017 13:30	AU	Commodity Index AUD	Dec	--	--	10970.00%	--
01/03/2017 15:45	FR	CPI EU Harmonized YoY	Dec P	0.90%	--	0.70%	--
01/03/2017 15:45	FR	CPI YoY	Dec P	0.008	--	0.005	--
01/03/2017 16:00	GE	CPI Saxony YoY	Dec	--	--	0.80%	--
01/03/2017 16:30	HK	Retail Sales Volume YoY	Nov	-3.00%	--	-2.70%	--
01/03/2017 16:30	HK	Retail Sales Value YoY	Nov	-3.20%	--	-2.90%	--
01/03/2017 16:55	GE	Unemployment Change (000's)	Dec	-5k	--	-5k	--
01/03/2017 16:55	GE	Unemployment Claims Rate SA	Dec	6.00%	--	6.00%	--
01/03/2017 17:00	GE	CPI Brandenburg MoM	Dec	--	--	0.001	--
01/03/2017 17:00	GE	CPI Bavaria MoM	Dec	--	--	0	--
01/03/2017 17:00	GE	CPI Bavaria YoY	Dec	--	--	0.008	--
01/03/2017 17:30	GE	CPI North Rhine Westphalia MoM	Dec	--	--	0	--
01/03/2017 17:30	UK	Markit UK PMI Manufacturing S/	Dec	53.3	--	53.4	--
01/03/2017 21:00	GE	CPI YoY	Dec P	0.014	--	0.008	--
01/03/2017 21:00	GE	CPI MoM	Dec P	0.006	--	0.001	--
01/03/2017 21:00	GE	CPI EU Harmonized MoM	Dec P	0.006	--	0	--
01/03/2017 21:00	GE	CPI EU Harmonized YoY	Dec P	0.013	--	0.007	--
01/03/2017 21:00	SI	Purchasing Managers Index	Dec	50.1	--	50.2	--
01/03/2017 22:30	CA	RBC Canadian Manufacturing PI	Dec	--	--	51.5	--
01/03/2017 22:45	US	Markit US Manufacturing PMI	Dec F	54.2	--	54.2	--
01/03/2017 23:00	US	ISM Manufacturing	Dec	53.7	--	53.2	--
01/03/2017 23:00	US	ISM Prices Paid	Dec	55.5	--	54.5	--
01/03/2017 23:00	US	Construction Spending MoM	Nov	0.005	--	0.005	--
01/03/2017	ID	CPI Core YoY	Dec	0.0311	--	0.0307	--
01/03/2017	ID	CPI YoY	Dec	0.0305	--	0.0358	--
01/03/2017	ID	CPI NSA MoM	Dec	0.0045	--	0.0047	--
01/03/2017 01/10	ID	Consumer Confidence Index	Dec	--	--	115.9	--

Source: Bloomberg

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