

Monday, December 05, 2016

Ringkasan Utama

- **Snapshot Global:** Pasar global mencermati adanya berita tentang hasil referendum Italia mengenai perubahan Undang-Undang Dasar mereka. Referendum tersebut gagal mendapatkan dukungan mayoritas penduduk, dan menyebabkan PM Matteo Renzi meletakkan jabatan dia pagi ini. Dengan adanya ketidakpastian politik, pasar akan mencermati kemungkinan peningkatan kesulitan sektor perbankan di negara tersebut, dan juga potensi menjalarnya masalah Italia ke negara Eurozone lainnya.

Sementara itu, pasar juga mencermati adanya data yang menunjukkan bahwa ekonomi AS menciptakan lapangan kerja sebanyak 178rb untuk bulan November yang mampu menekan angka pengangguran ke 4,6% yakni level terendah dalam 9 tahun. Hal ini kembali menyebabkan pasar fokus kepada kemungkinan kenaikan suku bunga oleh Federal Reserve di minggu depan.

- **Indonesia:** Bank Indonesia menyatakan bahwa akan memonitor aliran dana repatriasi pada rangka program tax amnesty pemerintah. BI mengantisipasi adanya aliran dana masuk sekitar IDR100tn menjelang akhir tahun 2016.

Analisa Sekilas

- **FX:** EUR melemah ke level terendah terhadap USD dalam 20 bulan belakangan dengan adanya hasil referendum Italia yang dianggap tidak positif bagi situasi ekonomi Italia.

Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas		
USD-IDR	13512	EUR-USD	1,0664	Index	Nilai Indeks/Harga
EUR-IDR	14411,72	GBP-USD	1,2729	DJIA	19170,42
GBP-IDR	17042,17	USD-JPY	113,51	Nasdaq	5255,65
JPY-IDR	118,65	AUD-USD	0,7457	Nikkei 225	18426,08
AUD-IDR	10037,79	NZD-USD	0,7141	STI	2919,37
CAD-IDR	10157,10	USD-CAD	1,3292	KLCI	1628,96
SGD-IDR	9490,03	USD-CHF	1,0111	JCI	5245,96
MYR-IDR	3033,68	USD-NOK	8,4219	Baltic Dry	1198,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)		
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)		
O/N	4,20	1Y	6,98		
1 Minggu	4,86	2Y	7,83		
1 Bulan	6,16	5Y	7,91		
3 Bulan	7,03	10Y	8,06		
6 Bulan	7,24	15Y	8,20		
12 Bulan	7,42	20Y	8,24		

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For reference only. Source: Bloomberg, OCBC Bank

Key Economic Indicators

Date	Time	Event		Survey	Actual	Prior	Revised	
12/02/2016	07:00	SK	GDP YoY	3Q F	2.70%	2.60%	2.70%	--
12/02/2016	07:50	JN	Monetary Base YoY	Nov	--	21.50%	22.10%	--
12/02/2016	08:30	AU	Retail Sales MoM	Oct	0.30%	0.50%	0.60%	--
12/02/2016	15:30	TH	Foreign Reserves	Nov-25	--	\$175.7b	\$177.2b	--
12/02/2016	17:30	UK	Markit/CIPS UK Construction PMI	Nov	52.2	52.8	52.6	--
12/02/2016	18:00	EC	PPI MoM	Oct	0.50%	0.80%	0.10%	--
12/02/2016	21:00	SI	Purchasing Managers Index	Nov	50	50.2	50	--
12/02/2016	21:30	CA	Labor Productivity QoQ	3Q	1.00%	1.20%	-0.30%	-0.20%
12/02/2016	21:30	CA	Unemployment Rate	Nov	7.00%	6.80%	7.00%	--
12/02/2016	21:30	US	Change in Nonfarm Payrolls	Nov	180k	178k	161k	142k
12/02/2016	21:30	CA	Net Change in Employment	Nov	-15.0k	10.7k	43.9k	--
12/02/2016	21:30	US	Change in Manufact. Payrolls	Nov	-2k	-4k	-9k	-5k
12/02/2016	21:30	US	Unemployment Rate	Nov	4.90%	4.60%	4.90%	--
12/05/2016	08:00	NZ	ANZ Commodity Price	Nov	--	--	0.70%	--
12/05/2016	08:30	SI	Nikkei Singapore PMI	Nov	--	--	50.5	--
12/05/2016	08:30	HK	Nikkei Hong Kong PMI	Nov	--	--	48.2	--
12/05/2016	08:30	JN	Nikkei Japan PMI Services	Nov	--	--	50.5	--
12/05/2016	08:30	JN	Nikkei Japan PMI Composite	Nov	--	--	51.3	--
12/05/2016	09:45	CH	Caixin China PMI Services	Nov	--	--	52.4	--
12/05/2016	09:45	CH	Caixin China PMI Composite	Nov	--	--	52.9	--
12/05/2016	13:00	IN	Nikkei India PMI Services	Nov	--	--	54.5	--
12/05/2016	13:00	IN	Nikkei India PMI Composite	Nov	--	--	55.4	--
12/05/2016	16:45	IT	Markit/ADACI Italy Services PMI	Nov	51.6	--	51	--
12/05/2016	16:45	IT	Markit/ADACI Italy Comp PMI	Nov	51.6	--	51.1	--
12/05/2016	16:50	FR	Markit France Services PMI	Nov F	52.6	--	52.6	--
12/05/2016	16:50	FR	Markit France Composite PMI	Nov F	52.3	--	52.3	--
12/05/2016	16:55	GE	Markit Germany Services PMI	Nov F	55	--	55	--
12/05/2016	16:55	GE	Markit/BME Germany Comp PMI	Nov F	54.9	--	54.9	--
12/05/2016	17:00	EC	Markit Eurozone Services PMI	Nov F	54.1	--	54.1	--
12/05/2016	17:00	EC	Markit Eurozone Composite PMI	Nov F	54.1	--	54.1	--
12/05/2016	17:30	UK	Markit/CIPS UK Services PMI	Nov	54	--	54.5	--
12/05/2016	17:30	UK	Markit/CIPS UK Composite PMI	Nov	54.6	--	54.8	--
12/05/2016	18:00	EC	Retail Sales MoM	Oct	0.80%	--	-0.20%	--
12/05/2016	22:45	US	Markit US Services PMI	Nov F	54.8	--	54.7	--
12/05/2016	22:45	US	Markit US Composite PMI	Nov F	--	--	54.9	--
12/05/2016	23:00	US	ISM Non-Manf. Composite	Nov	55.5	--	54.8	--

Source: Bloomberg

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