

Thursday, October 06, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar terasa agak membaik dengan indeks saham AS utama naik rata-rata 0,5% kemarin. Hal ini terbawa oleh data ekonomi AS yang pada umumnya masih baik. Walaupun data lapangan kerja pribadi ADP agak lemah dibandingkan ekspektasi pasar, adanya data ISM bulan September untuk sektor non-manufaktur, atau services, yang naik ke 57,1 yakni terkuat dalam 11 bulan belakangan, lebih menjadi perhatian pasar.
- **Indonesia:** Pemerintah diberitakan sedang menyiapkan rights issue untuk dua BUMN, termasuk Jasa Marga. Sementara itu, Presiden Jokowi dijadwalkan akan kembali berangkat ke Kepulauan Natuna, yang menjadi fokus geopolitik Laut China Selatan belakangan ini.

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Analisa Sekilas

- **FX:** Dolar AS kembali bertahan di level terkuat terhadap mata uang major lainnya dalam rally terpanjang sejak bulan Maret, dengan adanya data ekonomi AS yang suportif yang membawakan antisipasi pasar terhadap kenaikan suku bunga Federal Reserve.

Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	12998	EUR-USD	1,1205	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14609,92	GBP-USD	1,2749	DJIA	18281,03	112,58
GBP-IDR	16565,85	USD-JPY	103,50	Nasdaq	5316,02	26,36
JPY-IDR	126,42	AUD-USD	0,7622	Nikkei 225	16819,24	83,59
AUD-IDR	9908,70	NZD-USD	0,7173	STI	2881,79	-2,85
CAD-IDR	9852,61	USD-CAD	1,3176	KLCI	1662,92	1,67
SGD-IDR	9489,16	USD-CHF	0,9743	JCI	5420,65	-51,67
MYR-IDR	3136,65	USD-NOK	8,0200	Baltic Dry	869,00	9,00
JIBOR (Rupiah)				Obligasi Pemerintah (Govt Bonds)		
Tenor	Suku Bunga (%)			Tenor	Imbal Hasil (%)	
O/N	4,71			1Y	6,14	
1 Minggu	5,24			2Y	6,60	
1 Bulan	6,19			5Y	6,84	
3 Bulan	7,03			10Y	7,02	
6 Bulan	7,26			15Y	7,26	
12 Bulan	7,48			20Y	7,37	

For reference only. Source: Bloomberg, OCBC Bank

OCBC Treasury

Research & Strategy

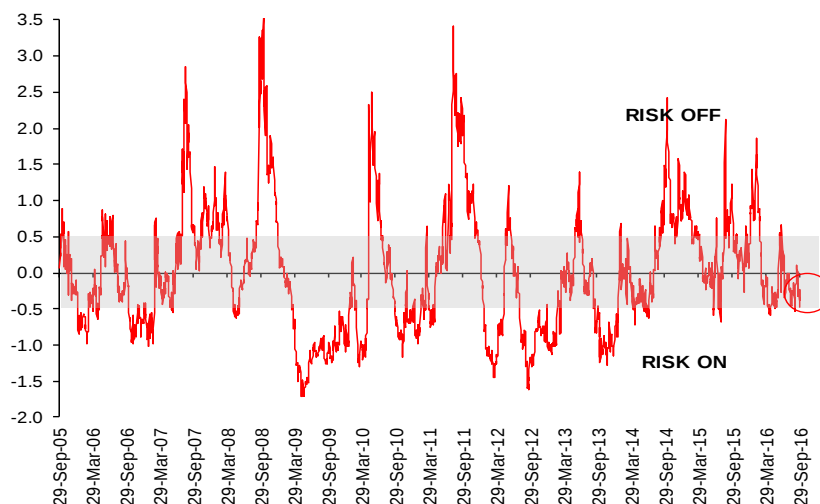
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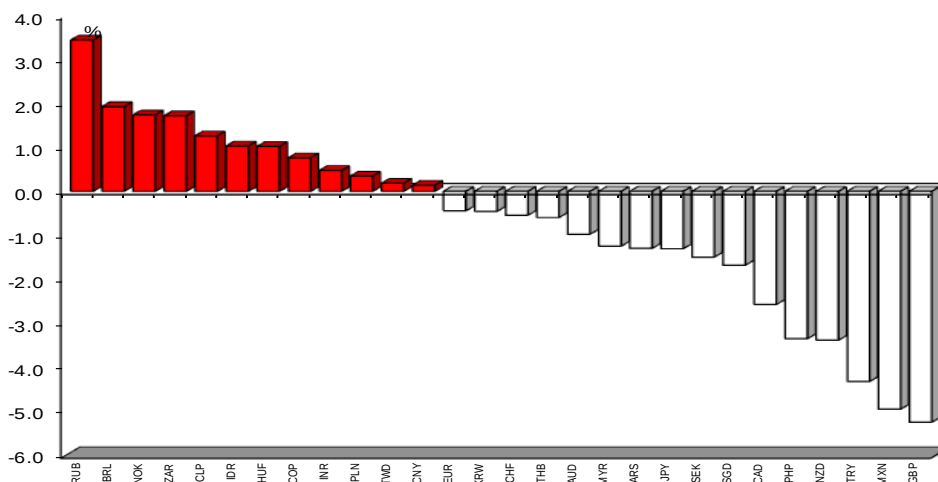
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date	Time	Event		Survey	Actual	Prior	Revised
10/05/2016 07:00	SK	CPI MoM	Sep	0.20%	0.60%	-0.10%	--
10/05/2016 07:00	SK	CPI YoY	Sep	0.70%	1.20%	0.40%	--
10/05/2016 08:00	NZ	ANZ Commodity Price	Sep	--	5.10%	3.20%	--
10/05/2016 08:30	SI	Nikkei Singapore PMI	Sep	--	52.9	52.3	--
10/05/2016 08:30	HK	Nikkei Hong Kong PMI	Sep	--	49.3	49	--
10/05/2016 08:30	JN	Nikkei Japan PMI Services	Sep	--	48.2	49.6	--
10/05/2016 08:30	JN	Nikkei Japan PMI Composite	Sep	--	48.9	49.8	--
10/05/2016 08:30	TA	CPI YoY	Sep	0.40%	0.33%	0.57%	--
10/05/2016 08:30	AU	Retail Sales MoM	Aug	0.20%	0.40%	0.00%	--
10/05/2016 09:00	PH	CPI YoY	Sep	2.10%	2.30%	1.80%	--
10/05/2016 09:00	PH	CPI NSA MoM	Sep	0.00%	0.20%	0.10%	--
10/05/2016 09:00	PH	CPI Core YoY	Sep	2.10%	2.30%	2.00%	--
10/05/2016 13:00	IN	Nikkei India PMI Services	Sep	--	52	54.7	--
10/05/2016 13:00	IN	Nikkei India PMI Composite	Sep	--	52.4	54.6	--
10/05/2016 15:45	IT	Markit/ADACI IT Services PMI	Sep	52	50.7	52.3	--
10/05/2016 15:45	IT	Markit/ADACI IT Composite PMI	Sep	51.5	51.1	51.9	--
10/05/2016 15:50	FR	Markit France Services PMI	Sep F	54.1	53.3	54.1	--
10/05/2016 15:50	FR	Markit France Composite PMI	Sep F	53.3	52.7	53.3	--
10/05/2016 15:55	GE	Markit Germany Services PMI	Sep F	50.6	50.9	50.6	--
10/05/2016 15:55	GE	Markit/BME GE Composite PMI	Sep F	52.7	52.8	52.7	--
10/05/2016 16:00	EC	Markit Eurozone Services PMI	Sep F	52.1	52.2	52.1	--
10/05/2016 16:00	EC	Markit EC Composite PMI	Sep F	52.6	52.6	52.6	--
10/05/2016 16:30	UK	Markit/CIPS UK Services PMI	Sep	52.2	52.6	52.9	--
10/05/2016 16:30	UK	Markit/CIPS UK Composite PMI	Sep	52.3	53.9	53.6	--
10/05/2016 17:00	EC	Retail Sales MoM	Aug	-0.30%	-0.10%	1.10%	0.30%
10/05/2016 17:00	EC	Retail Sales YoY	Aug	1.50%	0.60%	2.90%	1.80%
10/05/2016 19:00	US	MBA Mortgage Applications	Sep-30	--	2.90%	-0.70%	--
10/05/2016 20:15	US	ADP Employment Change	Sep	165k	154k	177k	175k
10/05/2016 20:30	US	Trade Balance	Aug	-\$39.2b	-\$40.7b	-\$39.5b	--
10/05/2016 20:30	CA	Int'l Merchandise Trade	Aug	-2.45b	-1.94b	-2.49b	-2.19b
10/05/2016 21:45	US	Markit US Services PMI	Sep F	51.9	52.3	51.9	--
10/05/2016 21:45	US	Markit US Composite PMI	Sep F	--	52.3	52	--
10/05/2016 22:00	US	ISM Non-Manf. Composite	Sep	53	57.1	51.4	--
10/05/2016 22:00	US	Factory Orders	Aug	-0.20%	0.20%	1.90%	1.40%
10/05/2016 22:00	US	Durable Goods Orders	Aug F	0.00%	0.10%	0.00%	--
10/05/2016 22:00	US	Durables Ex Transportation	Aug F	--	-0.20%	-0.40%	--
10/05/2016 22:00	US	Cap Goods Orders Nondef Ex Air	Aug F	--	0.90%	0.60%	--
10/05/2016 22:00	US	Cap Goods Ship Nondef Ex Air	Aug F	--	-0.10%	-0.40%	--
10/06/2016 05:00	SK	Foreign Reserves	Sep	--	\$377.77b	\$375.46b	--
10/06/2016 07:50	JN	Foreign Buying Japan Bonds	Sep-30	--	--	¥2804.9b	--
10/06/2016 07:50	JN	Foreign Buying Japan Stocks	Sep-30	--	--	¥211.7b	--
10/06/2016 08:30	AU	Trade Balance	Aug	-2300m	--	-2410m	--
10/06/2016 14:00	GE	Factory Orders MoM	Aug	0.30%	--	0.20%	--
10/06/2016 14:00	GE	Factory Orders WDA YoY	Aug	1.60%	--	-0.70%	--
10/06/2016 15:30	GE	Markit GE Construction PMI	Sep	--	--	51.6	--
10/06/2016 16:10	GE	Markit GE Retail PMI	Sep	--	--	54.1	--
10/06/2016 16:10	EC	Markit Eurozone Retail PMI	Sep	--	--	51	--
10/06/2016 16:10	FR	Markit France Retail PMI	Sep	--	--	53	--
10/06/2016 16:10	IT	Markit Italy Retail PMI	Sep	--	--	43.2	--
10/06/2016 20:30	CA	Building Permits MoM	Aug	1.00%	--	0.80%	--
10/06/2016 20:30	US	Initial Jobless Claims	Oct-01	256k	--	254k	--
10/06/2016 20:30	US	Continuing Claims	Sep-24	2081k	--	2062k	--
10/06/2016 21:45	US	Bloomberg Consumer Comfort	Oct-02	--	--	41.6	--
10/06/2016	ID	Consumer Confidence Index	Sep	--	--	113.3	--
10/06/2016 10/13	VN	Domestic Vehicle Sales YoY	Sep	--	--	28.40%	--

Source: Bloomberg

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