

Friday, January 08, 2016

Ringkasan Utama

- Snapshot Global:** China masih terus-menerus menjadi fokus pasar, di mana gejolak dari pasar saham dan mata uang mereka menjadi sumber pergerakan sentimen pasar global. Keputusan otoritas China untuk meniadakan circuit-breaker hari ini, setelah pasar saham mereka terpaksa ditutup setelah setengah jam pembukaan, akan menjadi sorotan pasar hari ini. Sementara itu, pasar juga akan mencermati data nonfarm payrolls dari AS malam ini, di mana ekspektasi pasar adalah untuk penciptaan lapangan kerja sebesar 200rb.
- Indonesia:** Cadangan devisa Indonesia naik tajam dari USD100,24bn di bulan November menjadi USD105,93bn di bulan Desember. Hal ini dapat menjadi sumber dukungan pergerakan mata uang Rupiah dalam waktu dekat, walaupun gejolak pasar karena perkembangan di China dapat menjadi faktor yang lebih penting.

Analisa Sekilas

- FX:** JPY menjadi best-performer dalam mata uang major minggu ini, dengan adanya permintaan safe haven karena gejolak di China.
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Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	13927	EUR-USD	1,0932	Index	Nilai Indeks/Harga	Nett
EUR-IDR	15044,64	GBP-USD	1,4618	DJIA	16514,10	-392,41
GBP-IDR	20275,33	USD-JPY	117,67	Nasdaq	4689,43	-146,34
JPY-IDR	118,45	AUD-USD	0,7012	Nikkei 225	17767,34	-423,98
AUD-IDR	9779,54	NZD-USD	0,6627	STI	2729,91	-74,36
CAD-IDR	9848,25	USD-CAD	1,4115	KLCI	1655,13	-12,84
SGD-IDR	9694,58	USD-CHF	0,9933	JCI	4530,45	-78,53
MYR-IDR	3168,73	USD-NOK	8,8843	Baltic Dry	445,00	-22,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)		Tenor	Imbal Hasil (%)		
O/N	5,78		1Y	7,85		
1 Minggu	6,49		2Y	8,59		
1 Bulan	8,20		5Y	8,88		
3 Bulan	8,69		10Y	8,82		
6 Bulan	8,83		15Y	8,98		
12 Bulan	8,94		20Y	9,03		

For reference only. Source: Bloomberg, OCBC Bank

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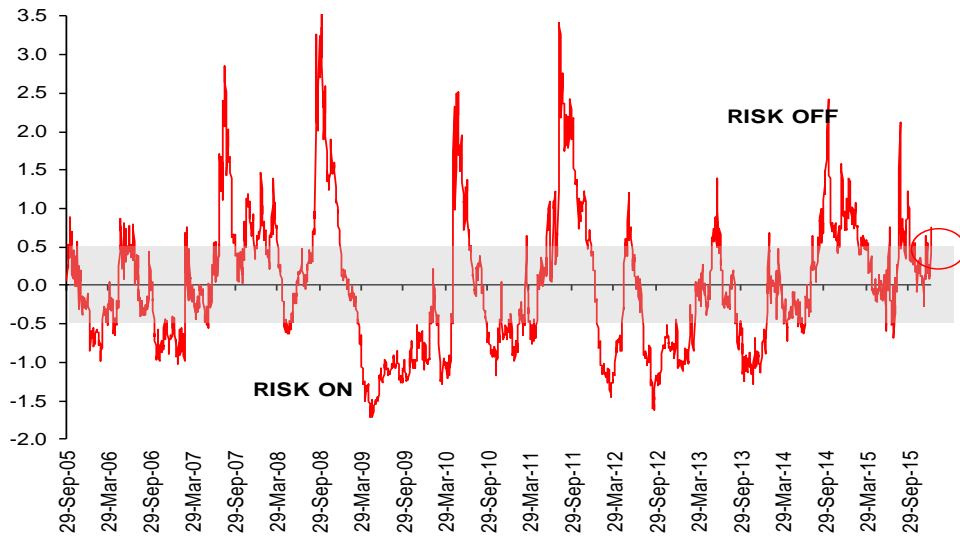
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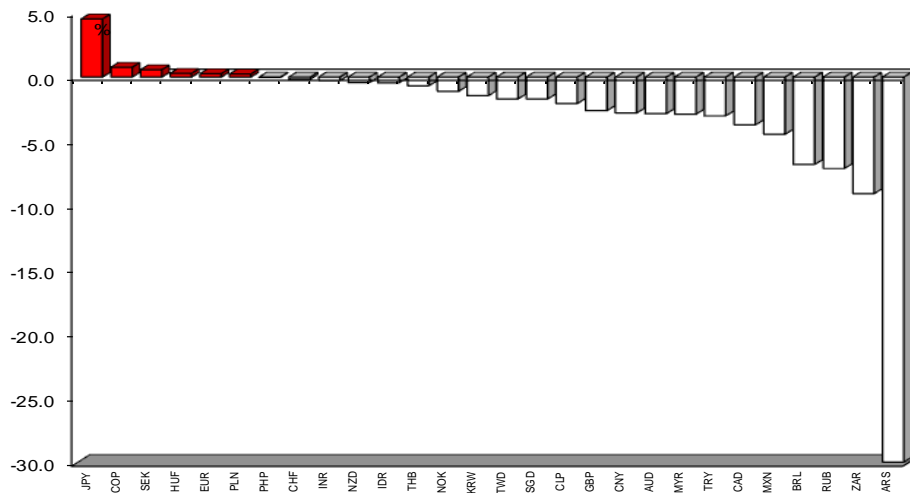
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source:

Bloomberg

Key Economic Indicators

Date Time	Event	Survey	Actual	Prior	Revised	
01/07/2016 03:00	US U.S. Fed Fed Minutes					
01/07/2016 07:50	JN Foreign Buying Japan Stocks	Jan-01	--	¥135.7b	-¥88.4b	--
01/07/2016 08:30	AU Trade Balance	Nov	-2985m	-2906m	-3305m	-3247m
01/07/2016 08:30	AU Building Approvals MoM	Nov	-3.00%	-12.70%	3.90%	3.30%
01/07/2016 11:00	PH Budget Balance PHP	Nov	--	6.0b	-27.0b	--
01/07/2016 12:00	MA Exports YoY	Nov	12.00%	6.30%	16.70%	--
01/07/2016 12:00	MA Trade Balance MYR	Nov	12.00b	10.24b	12.16b	12.17b
01/07/2016 15:00	GE Retail Sales MoM	Nov	0.50%	0.20%	-0.40%	-0.10%
01/07/2016 15:00	GE Retail Sales YoY	Nov	3.70%	2.30%	2.10%	2.50%
01/07/2016 15:00	GE Factory Orders MoM	Nov	0.10%	1.50%	1.80%	1.70%
01/07/2016 16:00	UK Halifax House Prices MoM	Dec	0.50%	1.70%	-0.20%	0.00%
01/07/2016 16:00	PH Foreign Reserves	Dec	--	\$80.6b	\$80.6b	--
01/07/2016 16:27	HK Foreign Reserves	Dec	--	\$358.8b	\$355.8b	--
01/07/2016 16:30	GE Markit Germany Construction PMI	Dec	--	55.5	52.5	--
01/07/2016 16:42	CH Foreign Reserves	Dec	\$3415.0b	\$3330.4b	\$3438.3b	--
01/07/2016 17:00	SI Foreign Reserves	Dec	--	\$247.75b	\$247.09b	--
01/07/2016 17:10	GE Markit Germany Retail PMI	Dec	--	50.5	49.6	--
01/07/2016 17:10	EC Markit Eurozone Retail PMI	Dec	--	49	48.5	--
01/07/2016 17:10	FR Markit France Retail PMI	Dec	--	46.6	47.8	--
01/07/2016 17:10	IT Markit Italy Retail PMI	Dec	--	50.2	47.7	--
01/07/2016 18:00	EC Economic Confidence	Dec	106	106.8	106.1	--
01/07/2016 18:00	EC Consumer Confidence	Dec F	-5.7	-5.7	-5.7	--
01/07/2016 18:00	EC Unemployment Rate	Nov	10.70%	10.50%	10.70%	10.60%
01/07/2016 18:00	EC Retail Sales MoM	Nov	0.20%	-0.30%	-0.10%	-0.20%
01/07/2016 18:00	EC Retail Sales YoY	Nov	2.00%	1.40%	2.50%	2.40%
01/07/2016 18:00	MA Foreign Reserves	Dec-31	--	\$95.3b	\$94.9b	--
01/07/2016 21:30	US Initial Jobless Claims	Jan-02	275k	277k	287k	--
01/07/2016 21:30	US Continuing Claims	Dec-26	2200k	2230k	2198k	2205k
01/07/2016 22:45	US Bloomberg Consumer Comfort	Jan-03	--	44.2	43.6	--
01/08/2016 08:22	ID Foreign Reserves	Dec	--	\$105.93b	\$100.24b	--
01/08/2016 08:30	AU Retail Sales MoM	Nov	0.40%	0.40%	0.50%	0.60%
01/08/2016 09:30	JN Labor Cash Earnings YoY	Nov	0.70%	--	0.70%	--
01/08/2016 13:00	JN Leading Index Cl	Nov P	103.9	--	104.2	--
01/08/2016 13:30	AU Foreign Reserves	Dec	--	--	A\$68.2b	--
01/08/2016 15:00	GE Industrial Production SA MoM	Nov	0.50%	--	0.20%	--
01/08/2016 15:00	GE Trade Balance	Nov	20.2b	--	22.5b	22.3b
01/08/2016 15:00	GE Current Account Balance	Nov	21.0b	--	23.0b	--
01/08/2016 15:00	GE Exports SA MoM	Nov	0.50%	--	-1.20%	-1.30%
01/08/2016 15:00	GE Imports SA MoM	Nov	1.00%	--	-3.40%	-3.30%
01/08/2016 15:30	TH Foreign Reserves	Dec-30	--	--	\$157.4b	--
01/08/2016 15:45	FR Trade Balance	Nov	-3947m	--	-4582m	--
01/08/2016 15:45	FR Industrial Production MoM	Nov	-0.30%	--	0.50%	--
01/08/2016 15:45	FR Manufacturing Production MoM	Nov	0.10%	--	-0.50%	--
01/08/2016 16:00	TA Trade Balance	Dec	\$3.30b	--	\$2.75b	--
01/08/2016 16:00	TA Exports YoY	Dec	-13.00%	--	-16.90%	--
01/08/2016 16:00	TA Imports YoY	Dec	-12.50%	--	-13.70%	--
01/08/2016 17:30	UK Visible Trade Balance GBP/Mn	Nov	-£10,500	--	-£11,827	--
01/08/2016 17:30	UK Trade Balance Non EU GBP/Mn	Nov	-£3,250	--	-£3,729	--
01/08/2016 17:30	UK Trade Balance	Nov	-£2,700	--	-£4,140	--
01/08/2016 21:30	CA Building Permits MoM	Nov	-2.90%	--	9.10%	--
01/08/2016 21:30	CA Unemployment Rate	Dec	7.10%	--	7.10%	--
01/08/2016 21:30	CA Net Change in Employment	Dec	8.0k	--	-35.7k	--
01/08/2016 21:30	US Change in Nonfarm Payrolls	Dec	200k	--	211k	--
01/08/2016 21:30	US Change in Manufact. Payrolls	Dec	-2k	--	-1k	--
01/08/2016 21:30	US Unemployment Rate	Dec	5.00%	--	5.00%	--
01/08/2016 23:00	US Wholesale Inventories MoM	Nov	-0.10%	--	-0.10%	--
01/08/2016 01/12	IN Local Car Sales	Dec	--	--	173111	--
01/08/2016 01/13	VN Domestic Vehicle Sales YoY	Dec	--	--	52.80%	--

Source: Bloomberg

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