Ringkasan Harian Pasar Finansial

OCBC Bank

Monday, August 08, 2016

Ringkasan Utama

- **Snapshot Global:** Pasar sedang mencermati data Nonfarm Payrolls dari AS yang ternyata jauh lebih bagus dari ekspektasi pasar. Data 255rb untuk bulan Juli tersebut juga merupakan kedua kali berturut-turutnya, setelah data 287rb bulan lalu. Sementara itu, cukup kuatnya data gaji karyawan, yang naik 0,3% mom, juga ikut mendorong sentimen positif terhadap ekonomi AS. Dengan begitu, ekspektasi pasar terhadap kemungkinan kenaikan suku bunga Federal Reserve tahun ini juga naik, dengan kemungkinan terjadi kenaikan 25bps di bulan Desember menjadi 47% setelah data suportif tersebut.

- **Indonesia:** Data PDB untuk kuartal II menunjukkan pembaikan pertumbuhan ekonomi Indonesia. Data 5,18%yoy tersebut lebih tinggi dari antisipasi pasar 5,0% maupun 4,92% dari kuartal pertama tahun ini. Kadar pertumbuhan tersebut juga merupakan yang tertinggi sejak zaman pemerintahan Presiden Jokowi.

Analisa Sekilas

- **FX:** USD menguat terhadap mata uang major lainnya, setelah adanya data nonfarm payrolls yang tinggi.

Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13117	**EUR-USD**	1.1086	**Index**	**Nilai Indeks/Harga**	**Nett**
EUR-IDR	14630.21	**GBP-USD**	1.3073	**DJIA**	18543.53	191.48
GBP-IDR	17237.59	**USD-JPY**	101.82	**Nasdaq**	5221.12	54.87
JPY-IDR	129.97	**AUD-USD**	0.7619	**Nikkei 225**	16254.45	-0.44
AUD-IDR	10051.2	**NZD-USD**	0.7144	**STI**	2828.17	-3.79
CAD-IDR	10081.06	**USD-CAD**	1.3172	**KLCI**	1664.04	8.75
SGD-IDR	9785.11	**USD-CHF**	0.9807	**JCI**	5420.25	46.38
MYR-IDR	3255.24	**USD-NOK**	8.5076	**Baltic Dry**	636.00	0.00

JIBOR (Rupiah)		Obligasi Pemerintah (Govt Bonds)	
Tenor	**Suku Bunga (%)**	**Tenor**	**Imbal Hasil (%)**
O/N	4.63	1Y	6.50
1 Minggu	5.35	2Y	6.52
1 Bulan	6.17	5Y	6.69
3 Bulan	7.13	10Y	6.86
6 Bulan	7.40	15Y	7.24
12 Bulan	7.66	20Y	7.33

For reference only. Source: Bloomberg, OCBC Bank

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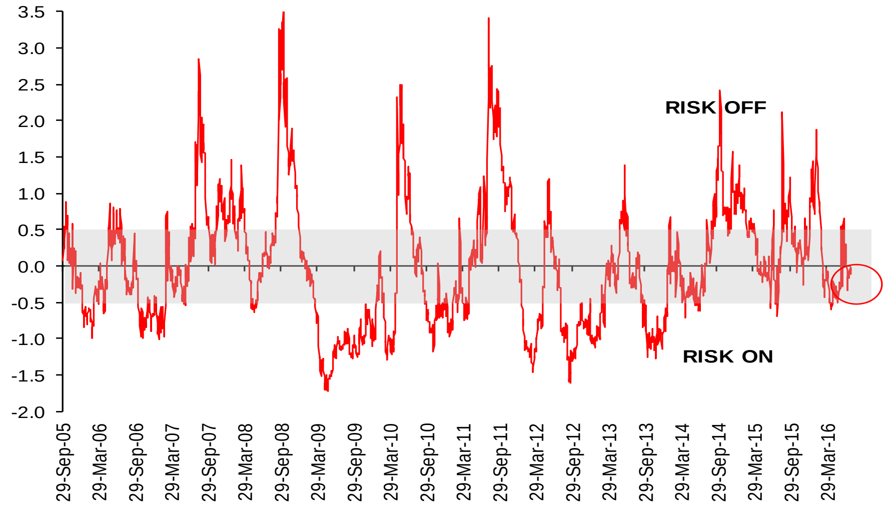
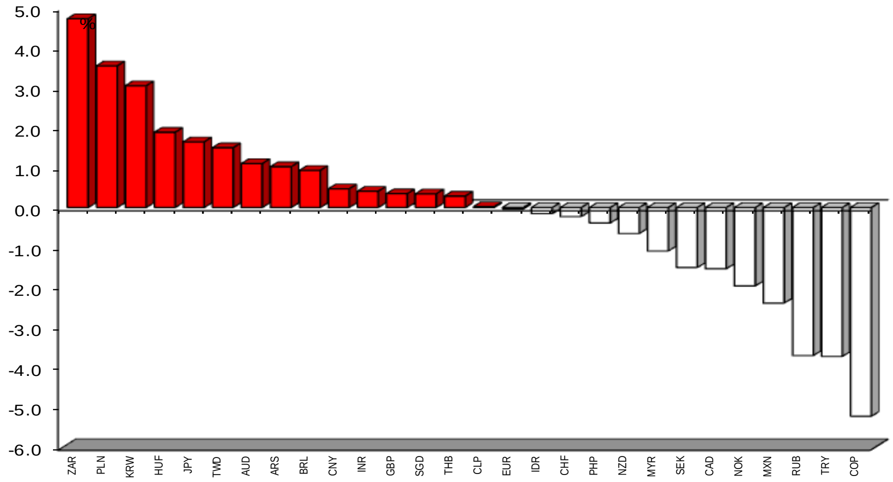
FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time		Event		Survey	Actual	Prior	Revised
08/05/2016 08:00	JN	Labor Cash Earnings YoY	Jun	0.30%	1.30%	-0.20%	-0.10%
08/05/2016 08:30	TA	CPI YoY	Jul	1.01%	1.23%	0.90%	0.91%
08/05/2016 09:00	**PH**	**CPI YoY**	**Jul**	**2.10%**	**1.90%**	**1.90%**	**--**
08/05/2016 10:15	**ID**	**GDP YoY**	**2Q**	**5.00%**	**5.18%**	**4.92%**	**4.91%**
08/05/2016 12:00	MA	Trade Balance MYR	Jun	6.00b	5.52b	3.26b	3.28b
08/05/2016 13:00	JN	Leading Index CI	Jun P	99.7	98.4	99.7	--
08/05/2016 14:00	GE	Factory Orders WDA YoY	Jun	-1.50%	-3.10%	-0.20%	0.00%
08/05/2016 14:04	PH	Foreign Reserves	Jul	--	$85.5b	$84.0b	--
08/05/2016 14:45	FR	Trade Balance	Jun	-3900m	-3440m	-2840m	-2717m
08/05/2016 15:00	MA	Foreign Reserves	Jul-29	--	$97.3b	$97.3b	--
08/05/2016 15:30	**UK**	**Halifax House Prices MoM**	**Jul**	**-0.20%**	**-1.00%**	**1.30%**	**1.20%**
08/05/2016 15:30	**TH**	**Foreign Reserves**	**Jul-29**	**--**	**$180.2b**	**$178.7b**	**--**
08/05/2016 16:00	**IT**	**Industrial Production MoM**	**Jun**	**0.30%**	**-0.40%**	**-0.60%**	**--**
08/05/2016 16:30	HK	Foreign Reserves	Jul	--	$362.9b	$360.6b	$360.7b
08/05/2016 18:10	**ID**	**Foreign Reserves**	**Jul**	**--**	**$111.41b**	**$109.79b**	**--**
08/05/2016 20:30	**US**	**Trade Balance**	**Jun**	**-$43.0b**	**-$44.5b**	**-$41.1b**	**-$41.0b**
08/05/2016 20:30	CA	Int'l Merchandise Trade	Jun	-2.84b	-3.63b	-3.28b	-3.50b
08/05/2016 20:30	**CA**	**Unemployment Rate**	**Jul**	**6.90%**	**6.90%**	**6.80%**	**--**
08/05/2016 20:30	**US**	**Change in Nonfarm Payrolls**	**Jul**	**180k**	**255k**	**287k**	**292k**
08/05/2016 20:30	**CA**	**Net Change in Employment**	**Jul**	**10.0k**	**-31.2k**	**-0.7k**	**--**
08/05/2016 20:30	US	Change in Manufact. Payrolls	Jul	4k	9k	14k	15k
08/05/2016 20:30	**US**	**Unemployment Rate**	**Jul**	**4.80%**	**4.90%**	**4.90%**	**--**
08/07/2016	CH	Foreign Reserves	Jul	$3200.0b	$3201.1b	$3205.2b	--
08/08/2016 07:50	**JN**	**BoP Current Account Balance**	**Jun**	**¥1103.5b**	**--**	**¥1809.1b**	**--**
08/08/2016 07:50	JN	Trade Balance BoP Basis	Jun	¥773.3b	--	¥39.9b	--
08/08/2016 09:30	AU	ANZ Job Advertisements MoM	Jul	--	--	0.50%	--
08/08/2016 13:00	JN	Eco Watchers Survey Current	Jul	42.5	--	41.2	--
08/08/2016 13:00	JN	Eco Watchers Survey Outlook	Jul	42	--	41.5	--
08/08/2016 14:00	**GE**	**Industrial Production SA MoM**	**Jun**	**0.70%**	**--**	**-1.30%**	**--**
08/08/2016 14:00	GE	Industrial Production WDA YoY	Jun	0.50%	--	-0.40%	--
08/08/2016 14:30	FR	Bank of France Bus. Sentiment	Jul	97	--	97	--
08/08/2016 14:30	AU	Foreign Reserves	Jul	--	--	A$69.6b	--
08/08/2016 16:00	TA	Trade Balance	Jul	$3.81b	--	$3.58b	--
08/08/2016 16:00	TA	Imports YoY	Jul	-5.00%	--	-10.00%	--
08/08/2016 16:00	**TA**	**Exports YoY**	**Jul**	**-2.00%**	**--**	**-2.10%**	**--**
08/08/2016 17:00	SI	Foreign Reserves	Jul	--	--	$248.86b	--
08/08/2016 20:30	CA	Building Permits MoM	Jun	1.50%	--	-1.90%	--
08/08/2016	ID	Consumer Confidence Index	Jul	--	--	113.7	--
08/08/2016	**CH**	**Trade Balance**	**Jul**	**$47.30b**	**--**	**$48.11b**	**--**
08/08/2016	**CH**	**Exports YoY**	**Jul**	**-3.50%**	**--**	**-4.80%**	**--**
08/08/2016	CH	Imports YoY	Jul	-7.00%	--	-8.40%	--
08/06/2016 08/13	**VN**	**Domestic Vehicle Sales YoY**	**Jul**	**--**	**--**	**26.50%**	**--**

Source: Bloomberg