

Monday, May 09, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar masih terasa relatif stabil walaupun adanya data lapangan kerja yang kurang mendukung dari AS. Seperti yang diumumkan pada hari Jumat malam, ekonomi AS menciptakan lapangan kerja sebanyak 160rb di bulan April, jauh lebih rendah dari ekspektasi pasar 202rb. Sementara itu, pasar juga sedang mencermati adanya beberapa data dari China, di mana cadangan devisa naik untuk bulan kedua menjadi USD3,23tn. Namun, data neraca perdagangan yang menunjukkan penurunan ekspor maupun impor untuk ekonomi tersebut.
- **Indonesia:** SKK Migas menyatakan bahwa pemerintah telah menyetujui rencana investasi 18 proyek sektor migas yang berjumlah 19,5tn untuk empat bulan pertama tahun ini. Proyek tersebut diperkirakan akan menghasilkan minyak bumi dan kondensat dengan total 45jt barel.

Analisa Sekilas

- **FX:** JPY melemah terhadap 16 mata uang major lainnya, dengan adanya perkiraan bahwa data lapangan kerja AS masih mendukung adanya kemungkinan kenaikan suku bunga sekurang-kurangnya satu kali dalam tahun ini.

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Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas		
USD-IDR	13348	EUR-USD	1,1404	Index	Nilai Indeks/Harga
EUR-IDR	15248,51	GBP-USD	1,4427	DJIA	17740,63
GBP-IDR	19338,34	USD-JPY	107,12	Nasdaq	4736,16
JPY-IDR	124,86	AUD-USD	0,7366	Nikkei 225	16106,72
AUD-IDR	9845,00	NZD-USD	0,6831	STI	2730,80
CAD-IDR	10395,07	USD-CAD	1,2909	KLCI	1649,36
SGD-IDR	9825,07	USD-CHF	0,9725	JCI	4822,60
MYR-IDR	3333,34	USD-NOK	8,2055	Baltic Dry	631,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)		
Tenor	Suku Bunga (%)		Tenor	Imbal Hasil (%)	
O/N	5,00		1Y	6,82	
1 Minggu	5,54		2Y	7,04	
1 Bulan	6,04		5Y	7,48	
3 Bulan	6,54		10Y	7,78	
6 Bulan	7,44		15Y	7,92	
12 Bulan	7,81		20Y	7,92	

For reference only. Source: Bloomberg, OCBC Bank

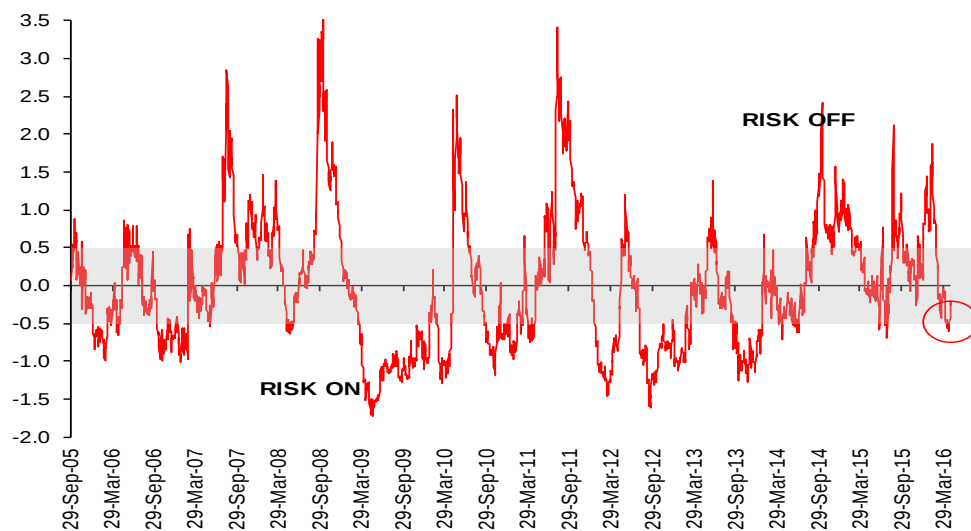
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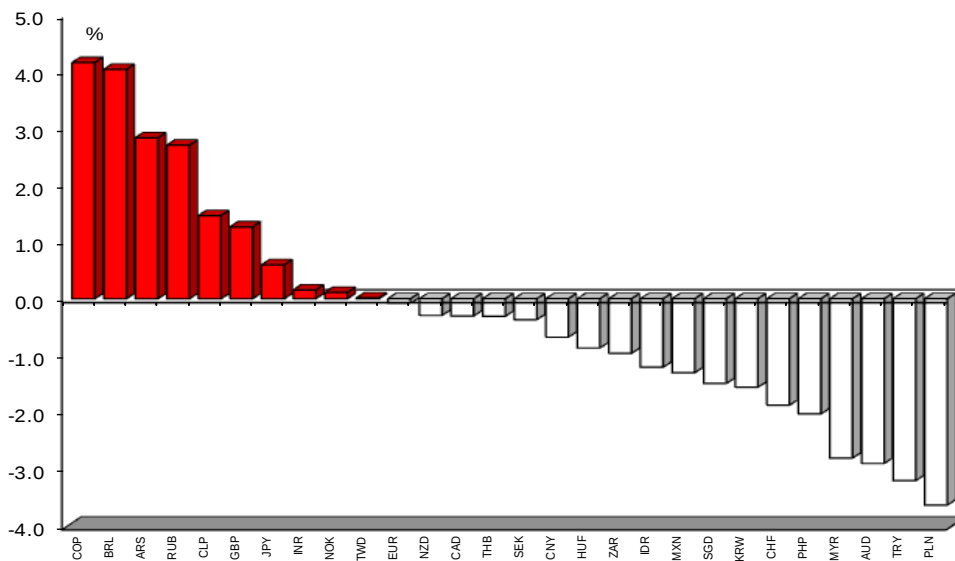
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Key Economic Indicators

Date Time	Event	Survey	Actual	Prior	Revised
05/06/2016 07:50	JN Monetary Base YoY	Apr	--	26.80%	28.50%
05/06/2016 10:00	JN Nikkei Japan PMI Services	Apr	--	49.3	50
05/06/2016 10:00	JN Nikkei Japan PMI Composite	Apr	--	48.9	49.9
05/06/2016 12:00	MA Exports YoY	Mar	-1.00%	0.20%	6.70%
05/06/2016 12:00	MA Trade Balance MYR	Mar	7.10b	11.19b	7.35b
05/06/2016 12:24	PH Foreign Reserves	Apr	--	\$83.5b	\$82.6b
05/06/2016 15:03	HK Foreign Reserves	Apr	--	\$360.8b	\$361.9b
05/06/2016 15:30	GE Markit GE Construction PMI	Apr	--	53.4	55.8
05/06/2016 16:10	GE Markit Germany Retail PMI	Apr	--	51	54.1
05/06/2016 16:10	EC Markit Eurozone Retail PMI	Apr	--	47.9	49.2
05/06/2016 16:10	FR Markit France Retail PMI	Apr	--	48.2	45.5
05/06/2016 16:10	IT Markit Italy Retail PMI	Apr	--	42.6	46.6
05/06/2016 18:00	MA Foreign Reserves	Apr-29	--	\$97.0b	\$97.2b
05/06/2016 20:30	CA Net Change in Employment	Apr	1.0k	-2.1k	40.6k
05/06/2016 20:30	US Change in Nonfarm Payrolls	Apr	200k	160k	215k
05/06/2016 20:30	CA Unemployment Rate	Apr	7.20%	7.10%	7.10%
05/06/2016 20:30	US Change in Manufact. Payrolls	Apr	-5k	4k	-29k
05/06/2016 20:30	US Unemployment Rate	Apr	4.90%	5.00%	5.00%
05/08/2016	CH Trade Balance	Apr	\$40.00b	\$45.56b	\$29.86b
05/08/2016	CH Exports YoY	Apr	0.00%	-1.80%	11.50%
05/08/2016	CH Imports YoY	Apr	-4.00%	-10.90%	-7.60%
05/09/2016 08:00	JN Labor Cash Earnings YoY	Mar	0.60%	--	0.90%
05/09/2016 09:30	AU ANZ Job Advertisements MoM	Apr	--	--	0.20%
05/09/2016 14:00	GE Factory Orders MoM	Mar	0.60%	--	-1.20%
05/09/2016 14:00	GE Factory Orders WDA YoY	Mar	0.10%	--	0.50%
05/09/2016 15:30	UK Halifax House Prices MoM	Apr	-0.30%	--	2.60%
05/09/2016 15:30	TH Foreign Reserves	Apr-29	--	--	\$176.9b
05/09/2016 16:00	TA Trade Balance	Apr	\$4.50b	--	\$4.50b
05/09/2016 16:00	TA Exports YoY	Apr	-8.00%	--	-11.40%
05/09/2016 16:00	TA Imports YoY	Apr	-8.80%	--	-17.00%
05/09/2016 17:00	SI Foreign Reserves	Apr	--	--	\$246.54b
05/09/2016 20:15	CA Housing Starts	Apr	193.0k	--	204.3k
05/06/2016 05/13	VN Domestic Vehicle Sales YoY	Apr	--	--	52.50%
05/09/2016 05/13	PH Budget Balance PHP	Feb	--	--	-3.5b
05/09/2016 05/12	IN Local Car Sales	Apr	--	--	175730

Source: Bloomberg

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