

Friday, July 15, 2016

Ringkasan Utama

- Snapshot Global:** Sentimen pasar kembali terasa membaik. Indeks saham Wall Street yang melambung dijangka akan ikut mendorong pergerakan positif indeks Asia hari ini. Sementara itu, pasar juga mencermati adanya keputusan Bank of England untuk menahan suku bunga di level yang sama, bertentangan dengan ekspektasi pasar bahwa bank sentral Inggris tersebut akan menurunkan suku bunga untuk membantu ekonomi post-Brexit tersebut.
- Indonesia:** Cadangan devisa Indonesia mencapai USD109,79bn di bulan Juni, yang merupakan level tertinggi sejak Mei 2015. Bank Indonesia menyatakan bahwa kenaikan devisa tersebut dikarenakan adanya penerimaan dolar dari global bond pemerintah maupun pendapatan migas yang melampaui pengeluaran untuk pembayaran bunga.

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Analisa Sekilas

- FX:** Japanese Yen kembali melemah, dengan masih adanya antisipasi stimulus fiskal dari pemerintah Shinzo Abe maupun berkurangnya permintaan untuk aset safe haven. Juga tersebar antisipasi pasar bahwa BOJ mungkin saja melakukan penambahan stimulus moneter.

Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13073	EUR-USD	1,1120	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14521,66	GBP-USD	1,3343	DJIA	18506,41	134,29
GBP-IDR	17285,37	USD-JPY	105,35	Nasdaq	5034,06	28,33
JPY-IDR	123,82	AUD-USD	0,7632	Nikkei 225	16385,89	154,46
AUD-IDR	9983,59	NZD-USD	0,7199	STI	2906,92	-3,73
CAD-IDR	10114,78	USD-CAD	1,2892	KLCI	1654,78	-5,61
SGD-IDR	9713,46	USD-CHF	0,9809	JCI	5083,54	-50,39
MYR-IDR	3312,56	USD-NOK	8,3644	Baltic Dry	738,00	12,00
JIBOR (Rupiah)				Obligasi Pemerintah (Govt Bonds)		
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)			
O/N	4,68	1Y	6,68			
1 Minggu	5,39	2Y	6,95			
1 Bulan	6,32	5Y	7,04			
3 Bulan	7,19	10Y	7,17			
6 Bulan	7,45	15Y	7,38			
12 Bulan	7,73	20Y	7,49			

For reference only. Source: Bloomberg, OCBC Bank

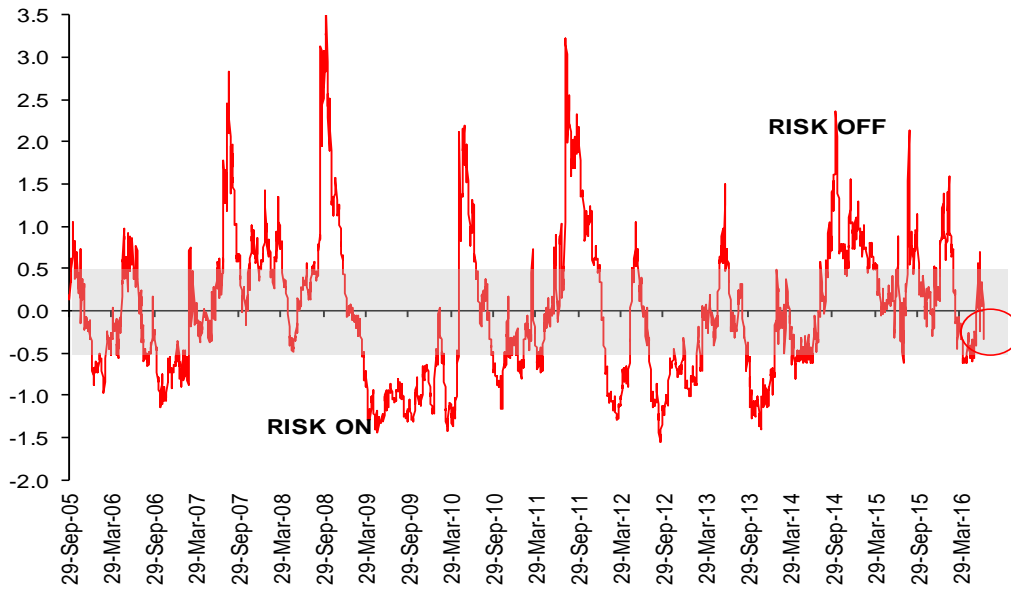
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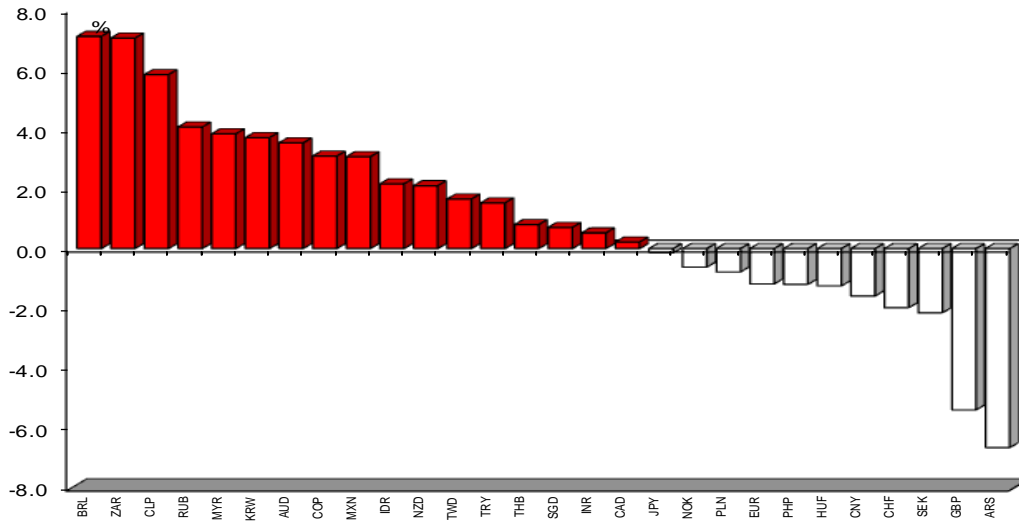
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time	Event	Survey	Actual	Prior	Revised	
07/14/2016 02:00	US Monthly Budget Statement	Jun	\$19.0b	\$6.3b	\$50.5b	--
07/14/2016 06:30	NZ BusinessNZ Mfg PMI	Jun	--	57.7	57.1	57.2
07/14/2016 07:01	UK RICS House Price Balance	Jun	10%	16%	19%	--
07/14/2016 07:50	JN Foreign Buying Japan Stocks	Jul-08	--	¥306.8b	¥113.9b	¥113.6b
07/14/2016 08:00	SI GDP YoY	2Q A	2.20%	2.20%	1.80%	2.10%
07/14/2016 08:00	SI GDP SAAR QoQ	2Q A	0.90%	0.80%	0.20%	--
07/14/2016 08:58	SK BoK 7-Day Repo Rate	Jul-14	1.25%	1.25%	1.25%	--
07/14/2016 09:30	AU Employment Change	Jun	10.0k	7.9k	17.9k	19.2k
07/14/2016 09:30	AU Unemployment Rate	Jun	5.80%	5.80%	5.70%	--
07/14/2016 09:30	AU Full Time Employment Change	Jun	--	38.4k	0.0k	2.5k
07/14/2016 09:30	AU Participation Rate	Jun	64.80%	64.90%	64.80%	--
07/14/2016 09:30	AU New Motor Vehicle Sales MoM	Jun	--	3.10%	-1.10%	-1.00%
07/14/2016 09:30	AU New Motor Vehicle Sales YoY	Jun	--	2.10%	1.70%	1.80%
07/14/2016 11:00	NZ Non Resident Bond Holdings	Jun	--	67.40%	68.50%	--
07/14/2016 12:00	JN Tokyo Condominium Sales YoY	Jun	--	-12.90%	-14.10%	--
07/14/2016 14:30	IN Wholesale Prices YoY	Jun	1.20%	1.62%	0.79%	--
07/14/2016 17:41	ID Foreign Reserves	Jun	--	\$109.79b	\$103.60b	--
07/14/2016 19:00	UK Bank of England Bank Rate	Jul-14	0.25%	0.50%	0.50%	--
07/14/2016 19:00	UK BOE Asset Purchase Target	Jul	375b	375b	375b	--
07/14/2016 20:30	US Initial Jobless Claims	Jul-09	265k	254k	254k	--
07/14/2016 20:30	CA New Housing Price Index MoM	May	0.20%	0.70%	0.30%	--
07/14/2016 20:30	US Continuing Claims	Jul-02	2130k	2149k	2124k	2117k
07/14/2016 20:30	US PPI Final Demand MoM	Jun	0.30%	0.50%	0.40%	--
07/15/2016 05:30	NZ REINZ House Sales YoY	Jun	--	6.00%	13.60%	--
07/15/2016 10:00	CH Industrial Production YoY	Jun	5.90%	--	6.00%	--
07/15/2016 10:00	CH Industrial Production YTD YoY	Jun	5.90%	--	5.90%	--
07/15/2016 10:00	CH Retail Sales YoY	Jun	9.90%	--	10.00%	--
07/15/2016 10:00	CH Retail Sales YTD YoY	Jun	10.20%	--	10.20%	--
07/15/2016 10:00	CH GDP YTD YoY	2Q	6.60%	--	6.70%	--
07/15/2016 10:00	CH GDP YoY	2Q	6.60%	--	6.70%	--
07/15/2016 13:00	SI Retail Sales SA MoM	May	1.30%	--	1.10%	--
07/15/2016 13:00	SI Retail Sales YoY	May	1.90%	--	3.80%	--
07/15/2016 14:00	EC EU27 New Car Registrations	Jun	--	--	16.00%	--
07/15/2016 15:30	TH Foreign Reserves	Jul-08	--	--	\$178.7b	--
07/15/2016 16:00	IT Trade Balance Total	May	--	--	4520m	--
07/15/2016 17:00	EC CPI MoM	Jun	0.20%	--	0.40%	--
07/15/2016 17:00	EC CPI YoY	Jun F	0.10%	--	0.10%	--
07/15/2016 17:00	EC CPI Core YoY	Jun F	0.90%	--	0.90%	--
07/15/2016 20:30	CA Manufacturing Sales MoM	May	-0.80%	--	1.00%	--
07/15/2016 20:30	US Retail Sales Advance MoM	Jun	0.10%	--	0.50%	--
07/15/2016 20:30	US CPI MoM	Jun	0.30%	--	0.20%	--
07/15/2016 20:30	US CPI YoY	Jun	1.10%	--	1.00%	--
07/15/2016 20:30	US CPI Ex Food and Energy YoY	Jun	2.20%	--	2.20%	--
07/15/2016 20:30	US Empire Manufacturing	Jul	5	--	6.01	--
07/15/2016 21:15	US Industrial Production MoM	Jun	0.30%	--	-0.40%	--
07/15/2016 21:15	US Capacity Utilization	Jun	75.10%	--	74.90%	--
07/15/2016 22:00	US U. of Mich. Sentiment	Jul P	93.5	--	93.5	--
07/15/2016	ID Trade Balance	Jun	\$212m	--	\$376m	--
07/15/2016	ID Exports YoY	Jun	-12.65%	--	-9.75%	--
07/15/2016	ID Imports YoY	Jun	-10.91%	--	-4.12%	--
07/15/2016	PH Overseas Remittances YoY	May	4.80%	--	4.10%	--
07/15/2016	PH Overseas Workers Remittances	May	\$2250m	--	\$2213m	--
07/14/2016 07/15	CH New Yuan Loans CNY	Jun	1000.0b	--	985.5b	--
07/14/2016 07/15	CH Money Supply M1 YoY	Jun	22.60%	--	23.70%	--
07/14/2016 07/15	CH Money Supply M2 YoY	Jun	11.40%	--	11.80%	--
07/13/2016 07/15	IN Exports YoY	Jun	--	--	-0.80%	--

Source: Bloomberg

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