

Tuesday, June 20, 2017

Ringkasan Utama

- Snapshot Global:** Sentimen pasar terasa agak terbantu dengan adanya kenaikan indeks saham AS S&P 500 kemarin sebesar 0,8%. Adanya rebound di saham sektor teknologi membawakan dukungan untuk sentimen tersebut. Pasar juga sedang mencermati adanya komentar yang dianggap dovish oleh kepala Federal Reserve Chicago, Charles Evans. Dia mengatakan bahwa Fed perlu serius mencermati adanya data inflasi yang masih lemah, mengingat masih jauhnya inflasi dari target Fed.
- Indonesia:** Menkeu Sri Mulyani menyatakan bahwa pemerintah sedang dalam proses revisi final untuk APBN 2017, di mana defisit anggaran mungkin akan dilebarkan menjadi 2,6% dari PDB. Pemerintah dikatakan memerlukan dana tambahan sebesar IDR37-40tn, termasuk untuk pembiayaan pengeluaran tambahan seperti persiapan Asian Games.

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Analisa Sekilas

- FX:** USD menguat setelah adanya komentar yang dianggap relatif hawkish oleh petinggi Fed New York, William Dudley kemarin, yang dikontraskan terhadap komentar dovish dari Charles Evans.

Financial Market Indicators (Indonesia)

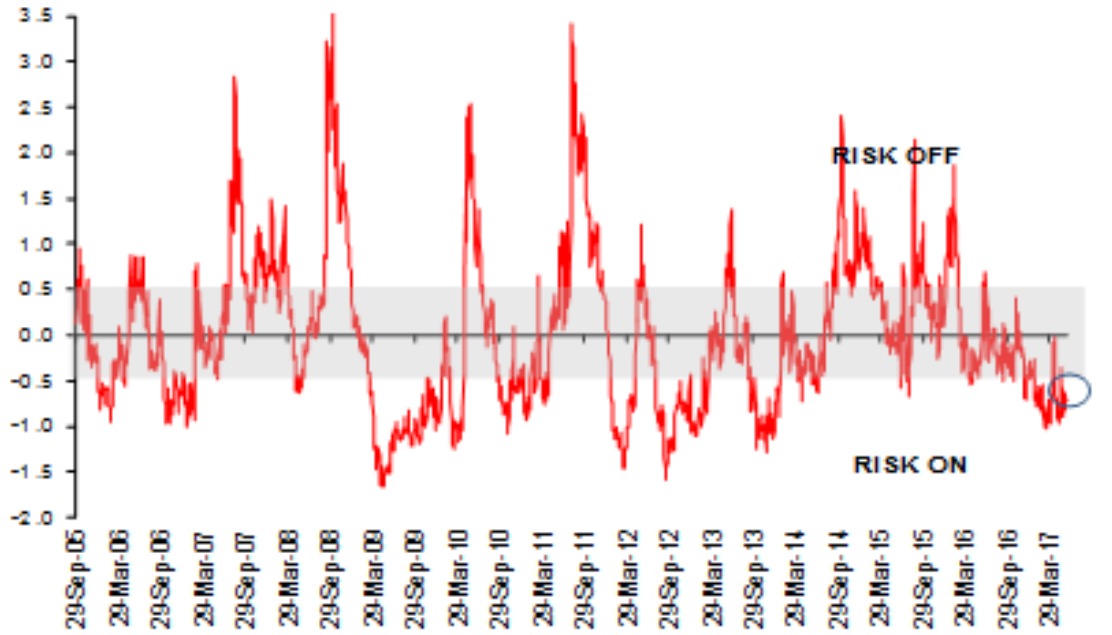
Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13282	EUR-USD	1,1149	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14873,58	GBP-USD	1,2737	DJIA	21528,99	144,71
GBP-IDR	17011,48	USD-JPY	111,53	Nasdaq	6239,01	87,26
JPY-IDR	119,63	AUD-USD	0,7600	Nikkei 225	20067,75	124,49
AUD-IDR	10092,28	NZD-USD	0,7232	STI	3247,18	15,74
CAD-IDR	10033,07	USD-CAD	1,3219	KLCI	1788,90	-2,41
SGD-IDR	9606,10	USD-CHF	0,9757	JCI	5741,91	18,27
MYR-IDR	3105,33	USD-NOK	8,5024	Baltic Dry	851,00	0,00
JIBOR (Rupiah)				Obligasi Pemerintah (Govt Bonds)		
Tenor	Suku Bunga (%)	Tenor		Imbal Hasil (%)		
O/N	4,41	1Y		6,08		
1 Minggu	4,99	2Y		6,43		
1 Bulan	6,19	5Y		6,65		
3 Bulan	6,86	10Y		6,79		
6 Bulan	7,10	15Y		7,34		
12 Bulan	7,27	20Y		7,52		

For reference only. Source: Bloomberg, OCBC Bank

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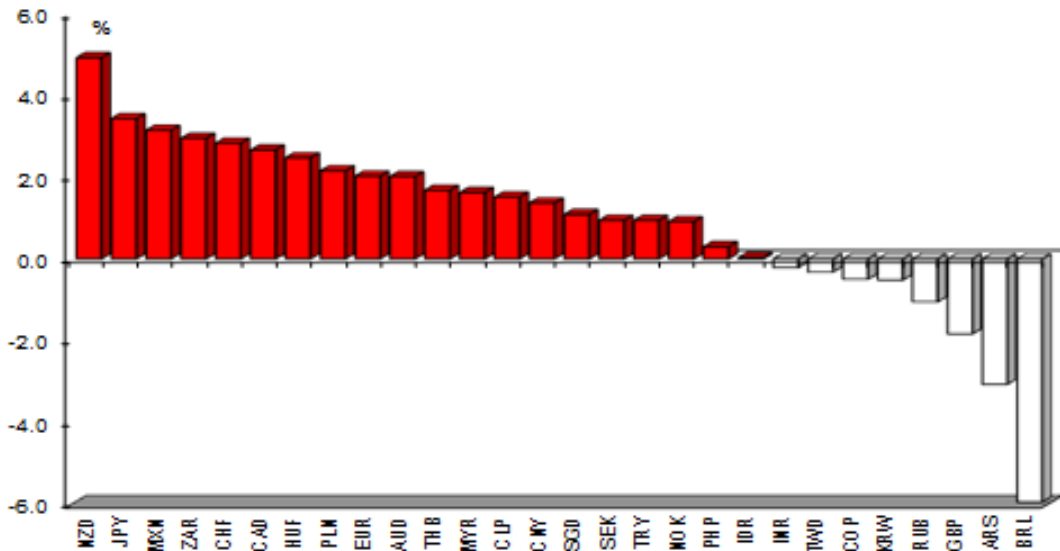
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date	Time	Event		Survey	Actual	Prior	Revised	
06/19/2017	05:00	SK	PPI YoY	May	--	3.50%	4.00%	3.80%
06/19/2017	06:00	NZ	Westpac Consumer Confidence	2Q	--	113.4	111.9	--
06/19/2017	06:30	NZ	Performance Services Index	May	--	58.8	52.8	53.2
06/19/2017	07:01	UK	Rightmove House Prices MoM	Jun	--	-0.40%	1.20%	--
06/19/2017	07:01	UK	Rightmove House Prices YoY	Jun	2.80%	1.80%	3.00%	--
06/19/2017	07:50	JN	Trade Balance	May	¥43.3b	-¥203.4b	¥481.7b	¥481.1b
06/19/2017	07:50	JN	Trade Balance Adjusted	May	¥345.5b	¥133.8b	¥97.6b	¥157.6b
06/19/2017	07:50	JN	Exports YoY	May	16.00%	14.90%	7.50%	--
06/19/2017	07:50	JN	Imports YoY	May	14.50%	17.80%	15.10%	15.20%
06/19/2017	09:30	AU	New Motor Vehicle Sales MoM	May	--	2.90%	0.30%	0.60%
06/19/2017	09:30	AU	New Motor Vehicle Sales YoY	May	--	4.90%	0.10%	0.40%
06/19/2017	09:30	CH	China May Property Prices					
06/19/2017	14:33	PH	BoP Overall	May	--	-\$59m	\$917m	--
06/19/2017	17:00	EC	Construction Output MoM	Apr	--	0.30%	-1.10%	--
06/19/2017	17:00	EC	Construction Output YoY	Apr	--	3.20%	3.60%	3.80%
06/19/2017	18:43	HK	Composite Interest Rate	May	--	0.31%	0.32%	--
06/19/2017	22:00	CA	Bloomberg Nanos Confidence	Jun-16	--	58	57.8	--
06/20/2017	09:00	NZ	ANZ Consumer Confidence Index	Jun	--	--	123.9	--
06/20/2017	09:00	NZ	ANZ Consumer Confidence MoM	Jun	--	--	1.80%	--
06/20/2017	09:30	AU	House Price Index QoQ	1Q	2.20%	--	4.10%	--
06/20/2017	09:30	AU	House Price Index YoY	1Q	8.90%	--	7.70%	--
06/20/2017	09:30	AU	RBA June Rate Meeting Minutes					
06/20/2017	13:30	JN	Nationwide Dept Sales YoY	May	--	--	0.70%	--
06/20/2017	13:30	JN	Tokyo Dept Store Sales YoY	May	--	--	-0.80%	--
06/20/2017	14:00	GE	PPI MoM	May	-0.10%	--	0.40%	--
06/20/2017	14:00	GE	PPI YoY	May	2.90%	--	3.40%	--
06/20/2017	15:00	JN	Convenience Store Sales YoY	May	--	--	0.30%	--
06/20/2017 16:00		TA	Export Orders YoY	May	7.50%	--	7.40%	--
06/20/2017	16:00	EC	ECB Current Account SA	Apr	--	--	34.1b	--
06/20/2017	16:00	EC	Current Account NSA	Apr	--	--	44.8b	--
06/20/2017	16:00	IT	Current Account Balance	Apr	--	--	3121m	--
06/20/2017 16:30		HK	CPI Composite YoY	May	2.10%	--	2.00%	--
06/20/2017 16:30		HK	Unemployment Rate SA	May	3.20%	--	3.20%	--
06/20/2017	20:30	CA	Wholesale Trade Sales MoM	Apr	0.50%	--	0.90%	--
06/20/2017	20:30	US	Revisions: Current Account					
06/20/2017	20:30	US	Current Account Balance	1Q	-\$123.6b	--	-\$112.4b	--
06/19/2017	06/30	PH	Budget Balance PHP	May	--	--	52.8b	--
06/19/2017	06/21	ID	Local Auto Sales	May	--	--	89588	--
06/19/2017	06/21	ID	Motorcycle Sales	May	--	--	388045	--

Source: Bloomberg

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