Ringkasan Harian Pasar Finansial

Wednesday, July 20, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar terasa agak menglemah dengan adanya pemangkasan ekspektasi pertumbuhan ekonomi global maupun Asia oleh IMF. Organisasi tersebut menyatakan bahwa ekonomi dunia mungkin akan mengalami faktor negatif jikalau negosiasi antara UK dan EU dalam rangka Brexit tidak berjalan dengan mulus.

- **Indonesia:** Data penjualan menunjukkan adanya gejala pemulihan pembelian konsumen. Penjualan sepeda motor, contohnya, naik dari 461rb unit di bulan Mei menjadi hampir 519rb unit di bulan Juni. Sementara itu, data penjualan mobil juga menunjukkan pemulihan, dari 88537 unit di bulan Mei menjadi hampir 92rb unit di bulan Juni.

Analisa Sekilas

- **FX:** USD menguat ke level terbaik dalam 6 minggu belakangan terhadap mata uang major lainnya, dengan adanya indikasi bahwa perekonomian AS semakin memulih.

Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13089	**EUR-USD**	1,1021	**Index**	**Nilai Indeks/Harga**	**Nett**
EUR-IDR	14474,68	**GBP-USD**	1,3111	**DJIA**	18559,01	25,96
GBP-IDR	17268,68	**USD-JPY**	106,12	**Nasdaq**	5036,37	-19,41
JPY-IDR	123,45	**AUD-USD**	0,7504	**Nikkei 225**	16723,31	225,46
AUD-IDR	9822,98	**NZD-USD**	0,7053	**STI**	2919,54	-9,22
CAD-IDR	10070,29	**USD-CAD**	1,3020	**KLCI**	1670,55	-0,29
SGD-IDR	9687,27	**USD-CHF**	0,9856	**JCI**	5172,83	45,33
MYR-IDR	3262,95	**USD-NOK**	8,5121	**Baltic Dry**	746,00	-2,00

JIBOR (Rupiah)		Obligasi Pemerintah (Govt Bonds)	
Tenor	**Suku Bunga (%)**	**Tenor**	**Imbal Hasil (%)**
O/N	4,65	1Y	6,61
1 Minggu	5,37	2Y	6,78
1 Bulan	6,26	5Y	6,87
3 Bulan	7,19	10Y	7,05
6 Bulan	7,45	15Y	7,31
12 Bulan	7,72	20Y	7,41

For reference only. Source: Bloomberg, OCBC Bank

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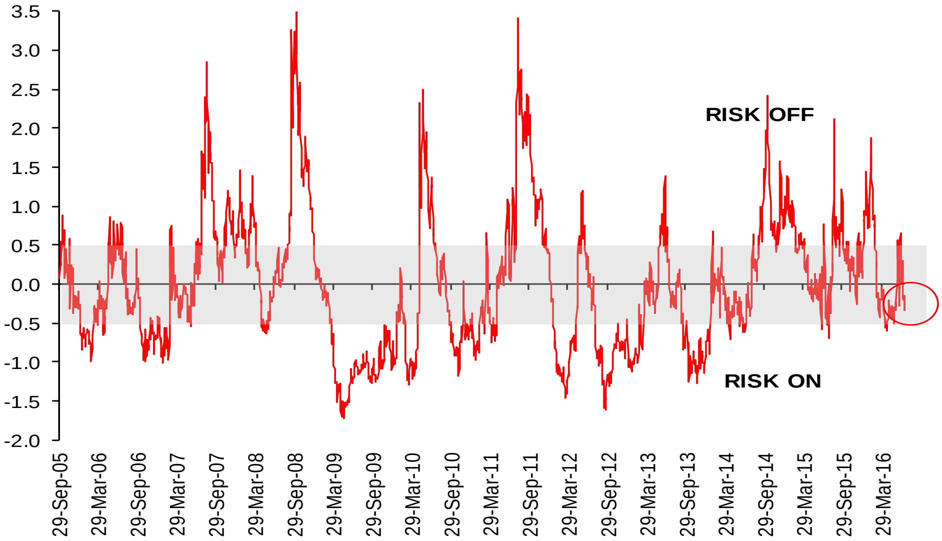
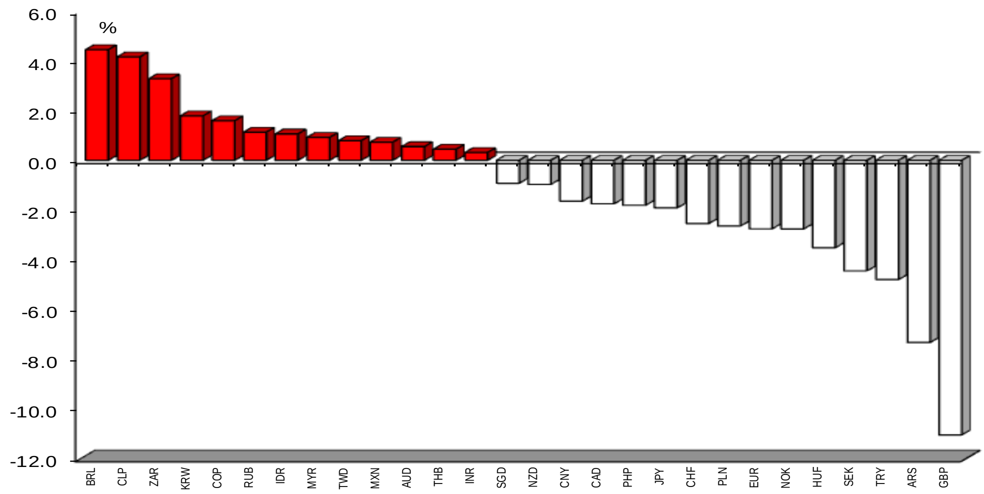
FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time		Event		Survey	Actual	Prior	Revised
07/19/2016 04:00	US	Total Net TIC Flows	May	--	-$11.0b	$80.4b	$93.1b
07/19/2016 04:00	US	Net Long-term TIC Flows	May	--	$41.1b	-$79.6b	-$67.4b
07/19/2016 05:00	SK	PPI YoY	Jun	--	-2.70%	-3.10%	-3.00%
07/19/2016 12:29	**PH**	**BoP Overall**	**Jun**	**--**	**$418m**	**$241m**	**--**
07/19/2016 16:30	**UK**	**CPI MoM**	**Jun**	**0.20%**	**0.20%**	**0.20%**	**--**
07/19/2016 16:30	**UK**	**CPI YoY**	**Jun**	**0.40%**	**0.50%**	**0.30%**	**--**
07/19/2016 16:30	**UK**	**CPI Core YoY**	**Jun**	**1.30%**	**1.40%**	**1.20%**	**--**
07/19/2016 16:30	UK	Retail Price Index	Jun	262.7	263.1	262.1	--
07/19/2016 16:30	UK	RPI MoM	Jun	0.20%	0.40%	0.30%	--
07/19/2016 16:30	UK	RPI YoY	Jun	1.50%	1.60%	1.40%	--
07/19/2016 16:30	UK	RPI Ex Mort Int.Payments (YoY)	Jun	1.50%	1.70%	1.50%	--
07/19/2016 16:30	**UK**	**PPI Output NSA MoM**	**Jun**	**0.20%**	**0.20%**	**0.10%**	**0.20%**
07/19/2016 16:30	**UK**	**PPI Output NSA YoY**	**Jun**	**-0.50%**	**-0.40%**	**-0.70%**	**-0.60%**
07/19/2016 16:30	**HK**	**Unemployment Rate SA**	**Jun**	**3.50%**	**3.40%**	**3.40%**	**--**
07/19/2016 16:31	HK	Composite Interest Rate	Jun	--	0.26%	0.26%	--
07/19/2016 17:00	**GE**	**ZEW Survey Expectations**	**Jul**	**9**	**-6.8**	**19.2**	**--**
07/19/2016 17:00	EC	ZEW Survey Expectations	Jul	--	-14.7	20.2	--
07/19/2016 20:30	**US**	**Housing Starts**	**Jun**	**1165k**	**1189k**	**1164k**	**1135k**
07/19/2016 20:30	US	Building Permits	Jun	1150k	1153k	1138k	1136k
07/20/2016 08:30	**AU**	**Westpac Leading Index MoM**	**Jun**	**--**	**--**	**0.21%**	**--**
07/20/2016 12:00	**MA**	**CPI YoY**	**Jun**	**1.80%**	**--**	**2.00%**	**--**
07/20/2016 13:30	JN	Nationwide Dept Sales YoY	Jun	--	--	-5.10%	--
07/20/2016 14:00	GE	PPI MoM	Jun	0.20%	--	0.40%	--
07/20/2016 14:00	GE	PPI YoY	Jun	-2.40%	--	-2.70%	--
07/20/2016 16:00	**TA**	**Export Orders YoY**	**Jun**	**-5.00%**	**--**	**-5.80%**	**--**
07/20/2016 16:00	SI	COE Open Bid Cat B	Jul-20	--	--	56089	--
07/20/2016 16:00	SI	COE Open Bid Cat A	Jul-20	--	--	52301	--
07/20/2016 16:30	**UK**	**Claimant Count Rate**	**Jun**	**2.20%**	**--**	**2.20%**	**--**
07/20/2016 16:30	**UK**	**Jobless Claims Change**	**Jun**	**3.5k**	**--**	**-0.4k**	**--**
07/20/2016 16:30	**UK**	**ILO Unemp Rate 3Mths**	**May**	**5.00%**	**--**	**5.00%**	**--**
07/20/2016 19:00	**US**	**MBA Mortgage Applications**	**Jul-15**	**--**	**--**	**7.20%**	**--**
07/20/2016 22:00	**EC**	**Consumer Confidence**	**Jul A**	**-8**	**--**	**-7.3**	**--**
07/20/2016 07/22	PH	Budget Balance PHP	May	--	--	55.0b	--

Source: Bloomberg