

Wednesday, July 20, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar terasa agak melemah dengan adanya pemangkasan ekspektasi pertumbuhan ekonomi global maupun Asia oleh IMF. Organisasi tersebut menyatakan bahwa ekonomi dunia mungkin akan mengalami faktor negatif jika 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.

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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
EUR-IDR	14474,68	GBP-USD	1,3111	DJIA	18559,01
GBP-IDR	17268,68	USD-JPY	106,12	Nasdaq	5036,37
JPY-IDR	123,45	AUD-USD	0,7504	Nikkei 225	16723,31
AUD-IDR	9822,98	NZD-USD	0,7053	STI	2919,54
CAD-IDR	10070,29	USD-CAD	1,3020	KLCI	1670,55
SGD-IDR	9687,27	USD-CHF	0,9856	JCI	5172,83
MYR-IDR	3262,95	USD-NOK	8,5121	Baltic Dry	746,00
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

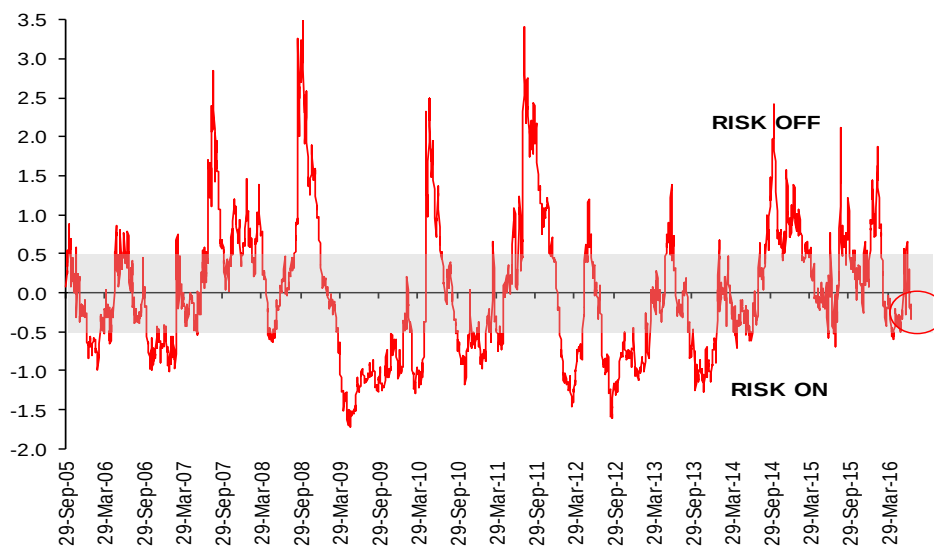
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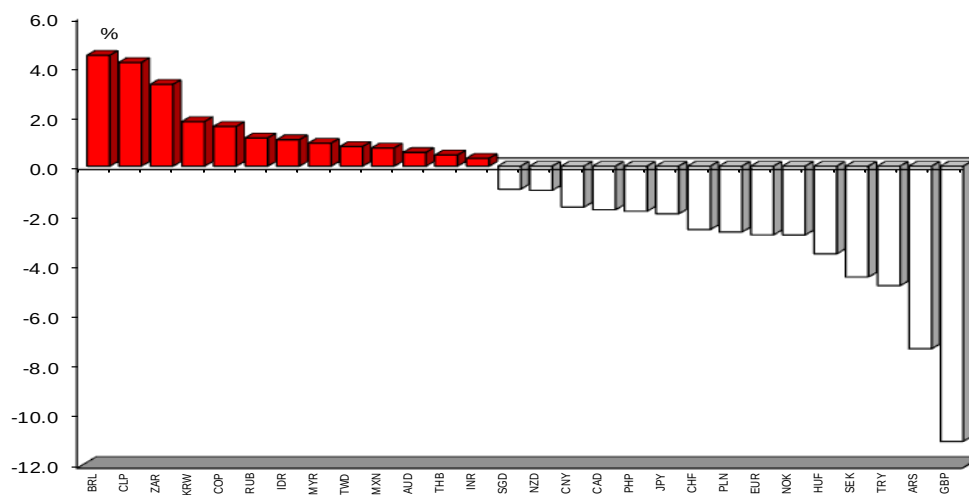
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FX Sentiment Index



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
07/19/2016 04:00	US Net Long-term TIC Flows	May	--	\$41.1b	-\$79.6b
07/19/2016 05:00	SK PPI YoY	Jun	--	-2.70%	-3.10%
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%
07/19/2016 16:30	UK PPI Output NSA YoY	Jun	-0.50%	-0.40%	-0.70%
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
07/19/2016 20:30	US Building Permits	Jun	1150k	1153k	1138k
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

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