

Wednesday, June 22, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar terasa masih relatif stabil. Rasa antisipasi terhadap referendum Brexit masih ada dengan mengingat pelaksanaannya besok. Untuk sementara waktu, pasar cenderung fokus kepada komentar dari Kepala Federal Reserve, Janet Yellen, di Senat AS kemarin. Dia mengatakan bahwa pertumbuhan ekonomi dalam beberapa kuartal belakangan masih belum seimbang, dan Fed akan masih “data-dependent” dalam menentukan perkembangan suku bunga pedoman mereka kedepan.
- **Indonesia:** Pemerintah dikabarkan akan menambahkan alokasi dana di APBN 2016 baru untuk investasi di Perusahaan Listrik Negara (PLN). Dana sebesar IDR13,56tn tersebut akan diarahkan kepada proyek-proyek pembangunan listrik yang dianggap tidak atau kurang feasible dari perhitungan ekonomi.

Analisa Sekilas

- **FX:** GBP agak melemah setelah adanya penguatan kuat kemarin. Hal ini dikarenakan tidak adanya kesimpulan konklusif dari pol-pol opini menjelang Hari-H referendum besok.

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Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13247	EUR-USD	1,1242	Index	Nilai Indeks/Harga	Nett
EUR-IDR	15021,92	GBP-USD	1,4652	DJIA	17829,73	24,86
GBP-IDR	19555,96	USD-JPY	104,75	Nasdaq	4843,76	6,55
JPY-IDR	126,80	AUD-USD	0,7450	Nikkei 225	16169,11	203,81
AUD-IDR	9934,21	NZD-USD	0,7122	STI	2789,45	-11,42
CAD-IDR	10368,29	USD-CAD	1,2817	KLCI	1637,69	3,46
SGD-IDR	9882,07	USD-CHF	0,9622	JCI	4878,71	15,18
MYR-IDR	3285,31	USD-NOK	8,3163	Baltic Dry	580,00	-2,00
JIBOR (Rupiah)				Obligasi Pemerintah (Govt Bonds)		
Tenor	Suku Bunga (%)			Tenor	Imbal Hasil (%)	
O/N	4,64			1Y	6,97	
1 Minggu	5,38			2Y	7,20	
1 Bulan	6,20			5Y	7,50	
3 Bulan	7,05			10Y	7,64	
6 Bulan	7,41			15Y	7,90	
12 Bulan	7,70			20Y	7,93	

For reference only. Source: Bloomberg, OCBC Bank

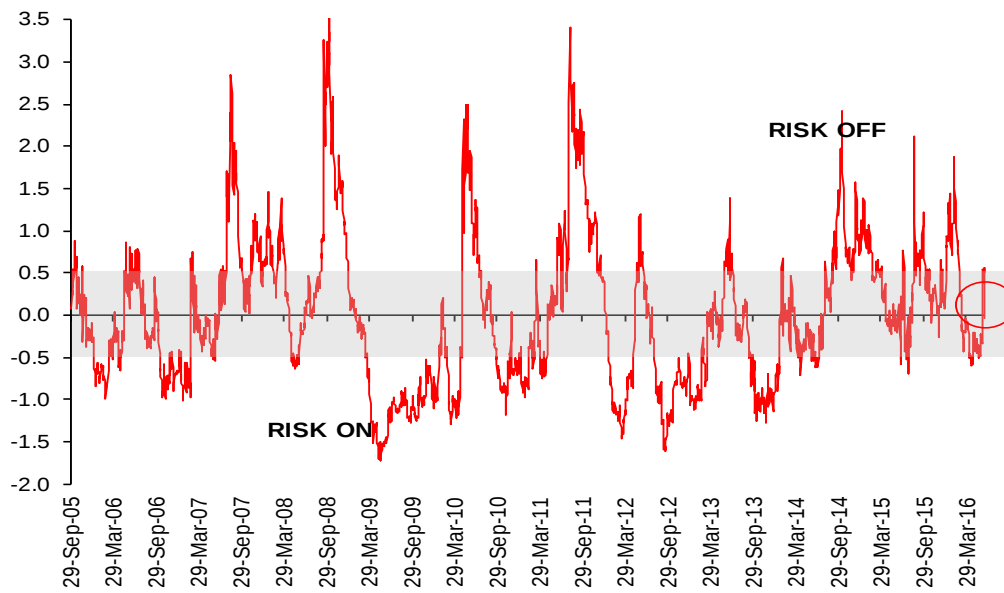
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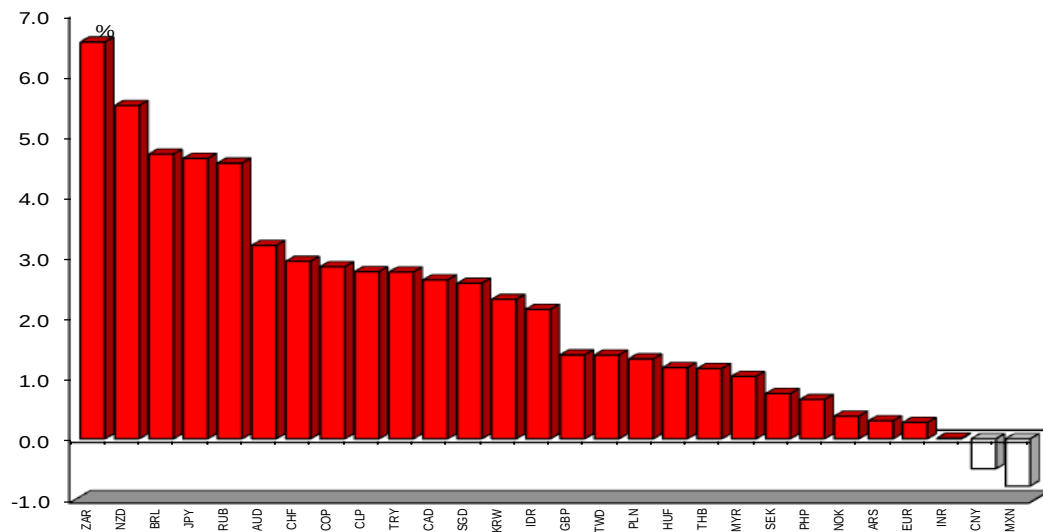
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time		Event		Survey	Actual	Prior	Revised
06/21/2016 12:30	JN	All Indust Activity Index MoM	Apr	1.20%	1.30%	0.10%	0.20%
06/21/2016 16:30	UK	Public Finances (PSNCR)	May	--	3.4b	-2.4b	-2.0b
06/21/2016 16:30	UK	Public Sector Net Borrowing	May	9.4b	9.1b	6.6b	7.6b
06/21/2016 16:30	UK	PSNB ex Banking Groups	May	9.5b	9.7b	7.2b	8.2b
06/21/2016 16:30	HK	CPI Composite YoY	May	2.60%	2.60%	2.70%	--
06/21/2016 17:00	GE	ZEW Survey Current Situation	Jun	53	54.5	53.1	--
06/21/2016 17:00	GE	ZEW Survey Expectations	Jun	4.8	19.2	6.4	--
06/21/2016 17:00	EC	ZEW Survey Expectations	Jun	--	20.2	16.8	--
06/21/2016 17:40	MU	CPI Composite YoY	May	--	2.64%	3.02%	--
06/21/2016 18:00	MA	Foreign Reserves	Jun-15	--	\$97.4b	\$97.3b	--
06/22/2016 08:30	TA	Unemployment Rate	May	3.95%	--	3.97%	--
06/22/2016 08:30	AU	Westpac Leading Index MoM	May	--	--	0.24%	--
06/22/2016 11:00	NZ	Credit Card Spending YoY	May	--	--	9.10%	--
06/22/2016 15:30	TH	BoT Benchmark Interest Rate	Jun-22	1.50%	--	1.50%	--
06/22/2016 16:00	SI	COE Open Bid Cat A	Jun-22	--	--	53694	--
06/22/2016 16:00	SI	COE Open Bid Cat B	Jun-22	--	--	56000	--
06/22/2016 19:00	US	MBA Mortgage Applications	Jun-17	--	--	-2.40%	--
06/22/2016 20:30	CA	Retail Sales MoM	Apr	0.80%	--	-1.00%	--
06/22/2016 20:30	CA	Retail Sales Ex Auto MoM	Apr	0.70%	--	-0.30%	--
06/22/2016 21:00	US	FHFA House Price Index MoM	Apr	0.60%	--	0.70%	--
06/22/2016 22:00	EC	Consumer Confidence	Jun A	-7	--	-7	--
06/22/2016 22:00	US	Existing Home Sales	May	5.55m	--	5.45m	--
06/22/2016 22:00	US	Existing Home Sales MoM	May	1.80%	--	1.70%	--
06/22/2016 06/24	PH	Budget Balance PHP	Apr	--	--	-74.4b	--

Source: Bloomberg

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