Ringkasan Harian Pasar Finansial

OCBC Bank

Wednesday, March 23, 2016

Ringkasan Utama

- **Snapshot Global:** Pasar terasa relatif lebih was-wasan setelah adanya berita tentang serangan teroris baru di Belgia kemarin, namun sentimen pasar masih termasuk cukup stabil. Sementara itu, pasar juga kembali mencermati adanya komentar relatif hawkish dari petinggi Fed yang satu lagi. Yakni Gubernur Evans yang menyatakan bahwa keputusan Fed untuk tidak menaikkan suku bunga pedoman mereka pada bulan Maret adalah untuk mencermati situasi hanya untuk sementara waktu.

- **Indonesia:** Menkeu Bambang Brodjonegoro menyatakan bahwa pemerintah akan mengubah asumsi APBN 2016 mengenai harga minyak bumi karena level USD50 per barel dalam asumsi sekarang terlalu ambisius. Sementara itu, Wapres Jusuf Kalla menyatakan bahwa pemerintah mungkin harus menurunkan anggaran belanja tahun ini, untuk menjaga agar defisit anggaran tidak menjadi terlalu lebar.

Analisa Sekilas

- **FX:** GBP menglemah terhadap mata uang lainnya dengan kembali adanya sorotan pasar terhadap kemungkinan Brexit, setelah adanya serangan teroris di Eropa.

Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13184	**EUR-USD**	1,1217	**Index**	**Nilai Indeks/Harga**	**Nett**
EUR-IDR	14763,53	**GBP-USD**	1,4208	**DJIA**	17582,57	-41,30
GBP-IDR	18797,89	**USD-JPY**	112,37	**Nasdaq**	4821,66	12,79
JPY-IDR	118,17	**AUD-USD**	0,7622	**Nikkei 225**	17048,55	323,74
AUD-IDR	9986,35	**NZD-USD**	0,6753	**STI**	2880,65	-0,04
CAD-IDR	10065,43	**USD-CAD**	1,3049	**KLCI**	1724,75	6,39
SGD-IDR	9684,27	**USD-CHF**	0,9727	**JCI**	4856,11	-29,06
MYR-IDR	3287,99	**USD-NOK**	8,4036	**Baltic Dry**	398,00	0,00

JIBOR (Rupiah)		Obligasi Pemerintah (Govt Bonds)	
Tenor	**Suku Bunga (%)**	**Tenor**	**Imbal Hasil (%)**
O/N	4,90	1Y	6,95
1 Minggu	5,52	2Y	7,46
1 Bulan	6,04	5Y	7,46
3 Bulan	6,71	10Y	7,80
6 Bulan	7,50	15Y	8,24
12 Bulan	7,87	20Y	8,28

For reference only. Source: Bloomberg, OCBC Bank

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Key Economic Indicators

Date Time		Event		Survey	Actual	Prior	Revised
03/22/2016 08:30	TA	Unemployment Rate	Feb	3.93%	3.94%	3.91%	--
03/22/2016 10:00	**JN**	**Nikkei Japan PMI Mfg**	**Mar P**	**50.5**	**49.1**	**50.1**	**--**
03/22/2016 12:30	**JN**	**All Ind. Activity Index MoM**	**Jan**	**1.90%**	**2.00%**	**-0.90%**	**--**
03/22/2016 16:00	**FR**	**Markit FR Manufacturing PMI**	**Mar P**	**50.2**	**49.6**	**50.2**	**--**
03/22/2016 16:00	FR	Markit France Services PMI	Mar P	49.5	51.2	49.2	--
03/22/2016 16:00	FR	Markit France Composite PMI	Mar P	49.7	51.1	49.3	--
03/22/2016 16:30	**GE**	**Markit/BME DE MFG PMI**	**Mar P**	**50.8**	**50.4**	**50.5**	**--**
03/22/2016 16:30	GE	Markit Germany Services PMI	Mar P	55	55.5	55.3	--
03/22/2016 16:30	GE	Markit/BME DE Composite PMI	Mar P	54.1	54.1	54.1	--
03/22/2016 17:00	**GE**	**IFO Business Climate**	**Mar**	**106**	**106.7**	**105.7**	**--**
03/22/2016 17:00	**GE**	**IFO Current Assessment**	**Mar**	**112.7**	**113.8**	**112.9**	**--**
03/22/2016 17:00	**GE**	**IFO Expectations**	**Mar**	**99.5**	**100**	**98.8**	**98.9**
03/22/2016 17:00	**EC**	**Markit EZ Manufacturing PMI**	**Mar P**	**51.4**	**51.4**	**51.2**	**--**
03/22/2016 17:00	EC	Markit Eurozone Services PMI	Mar P	53.3	54	53.3	--
03/22/2016 17:00	**EC**	**Markit EZ Composite PMI**	**Mar P**	**53**	**53.7**	**53**	**--**
03/22/2016 17:30	**UK**	**CPI MoM**	**Feb**	**0.40%**	**0.20%**	**-0.80%**	**--**
03/22/2016 17:30	**UK**	**CPI YoY**	**Feb**	**0.40%**	**0.30%**	**0.30%**	**--**
03/22/2016 17:30	**UK**	**CPI Core YoY**	**Feb**	**1.20%**	**1.20%**	**1.20%**	**--**
03/22/2016 17:30	UK	Retail Price Index	Feb	260.2	260	258.8	--
03/22/2016 17:30	UK	RPI MoM	Feb	0.50%	0.50%	-0.70%	--
03/22/2016 17:30	UK	RPI YoY	Feb	1.30%	1.30%	1.30%	--
03/22/2016 17:30	**UK**	**PPI Output NSA MoM**	**Feb**	**0.00%**	**0.10%**	**-0.10%**	**--**
03/22/2016 17:30	**UK**	**PPI Output NSA YoY**	**Feb**	**-1.20%**	**-1.10%**	**-1.00%**	**--**
03/22/2016 17:30	UK	ONS House Price YoY	Jan	--	7.90%	6.70%	--
03/22/2016 17:30	UK	PSNB ex Banking Groups	Feb	5.9b	7.1b	-11.2b	-13.8b
03/22/2016 18:00	**GE**	**ZEW Survey Current Situation**	**Mar**	**53**	**50.7**	**52.3**	**--**
03/22/2016 18:00	**GE**	**ZEW Survey Expectations**	**Mar**	**5.4**	**4.3**	**1**	**--**
03/22/2016 18:00	EC	ZEW Survey Expectations	Mar	--	10.6	13.6	--
03/22/2016 18:00	MA	Foreign Reserves	Mar-15	--	$96.1b	$95.6b	--
03/22/2016 21:00	US	FHFA House Price Index MoM	Jan	0.50%	0.50%	0.40%	0.50%
03/22/2016 21:45	**US**	**Markit US Manufacturing PMI**	**Mar P**	**51.9**	**51.4**	**51.3**	**--**
03/22/2016 22:00	US	Richmond Fed Manufact. Index	Mar	0	22	-4	--
03/23/2016 09:00	PH	Trade Balance	Jan	-$160m	--	$603m	--
03/23/2016 13:00	SI	CPI NSA MoM	Feb	0.20%	--	-0.20%	--
03/23/2016 13:00	**SI**	**CPI YoY**	**Feb**	**-0.70%**	**--**	**-0.60%**	**--**
03/23/2016 15:15	**TH**	**BoT Benchmark Interest Rate**	**Mar-23**	**1.50%**	**--**	**1.50%**	**--**
03/23/2016 16:00	TA	Industrial Production YoY	Feb	-5.30%	--	-5.65%	--
03/23/2016 16:00	**PH**	**BSP Overnight Rate**	**Mar-23**	**4.00%**	**--**	**4.00%**	**--**
03/23/2016 16:00	SI	COE Open Bid Cat A	Mar-23	--	--	45000	--
03/23/2016 19:00	**US**	**MBA Mortgage Applications**	**Mar-18**	**--**	**--**	**-3.30%**	**--**
03/23/2016 22:00	**US**	**New Home Sales**	**Feb**	**510k**	**--**	**494k**	**--**
03/23/2016	**MU**	**Visitor Arrivals**	**Feb**	**--**	**--**	**2446t**	**--**

Source: Bloomberg