

Wednesday, May 24, 2017

Ringkasan Utama

- **Snapshot Global:** Fokus global bertumpu di sekitar berita aksi teror di Manchester, Inggris namun sentiment pasar masih terasa cukup tertahan. Hal ini terbantu oleh adanya beberapa data ekonomi yang cukup positif, termasuk data PMI manufaktur dari Eropa. Untuk hari kedepan, pasar akan cenderung mencermati data-data seperti consumer confidence Jerman dan data pemukiman dari AS.
- **Indonesia:** Wakil Presiden Jusuf Kalla, seperti dikutip oleh harian Kompas, mengatakan bahwa tidak akan kembali mencalonkan dirinya menjadi Wapres pada pemilihan umum 2019, untuk beristirahat dan memberikan waktu lebih banyak kepada keluarga.

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Analisa Sekilas

- **FX:** AUD melemah terhadap mata uang major lainnya, dengan adanya dampak dari downgrade Moody's terhadap sovereign rating China pagi ini.

Financial Market Indicators (Indonesia)

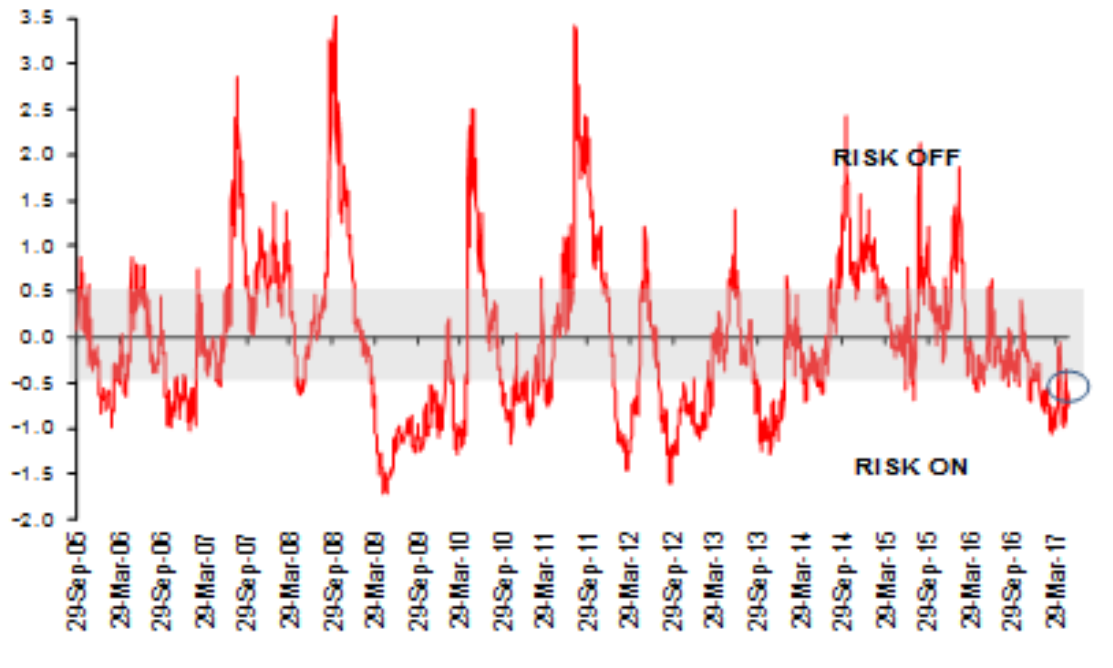
Nilai Mata Uang			Bursa Saham dan Komoditas			
				Nilai Indeks/Harga	Nett	
USD-IDR	13299	EUR-USD	1,1183	DJIA	20937,91	43,08
EUR-IDR	14963,88	GBP-USD	1,2961	Nasdaq	6138,71	5,09
GBP-IDR	17274,20	USD-JPY	111,78	Nikkei 225	19613,28	-65,00
JPY-IDR	119,61	AUD-USD	0,7478	STI	3222,69	9,12
AUD-IDR	9964,67	NZD-USD	0,7012	KLCI	1767,17	-7,78
CAD-IDR	9854,78	USD-CAD	1,3514	JCI	5730,61	-18,83
SGD-IDR	9589,13	USD-CHF	0,9760	Baltic Dry	949,00	-5,00
MYR-IDR	3097,30	USD-NOK	8,3744			
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)		Tenor	Imbal Hasil (%)		
O/N	4,40		1Y	6,29		
1 Minggu	4,86		2Y	6,59		
1 Bulan	5,88		5Y	6,70		
3 Bulan	6,86		10Y	6,97		
6 Bulan	7,10		15Y	7,37		
12 Bulan	7,27		20Y	7,61		

For reference only. Source: Bloomberg, OCBC Bank

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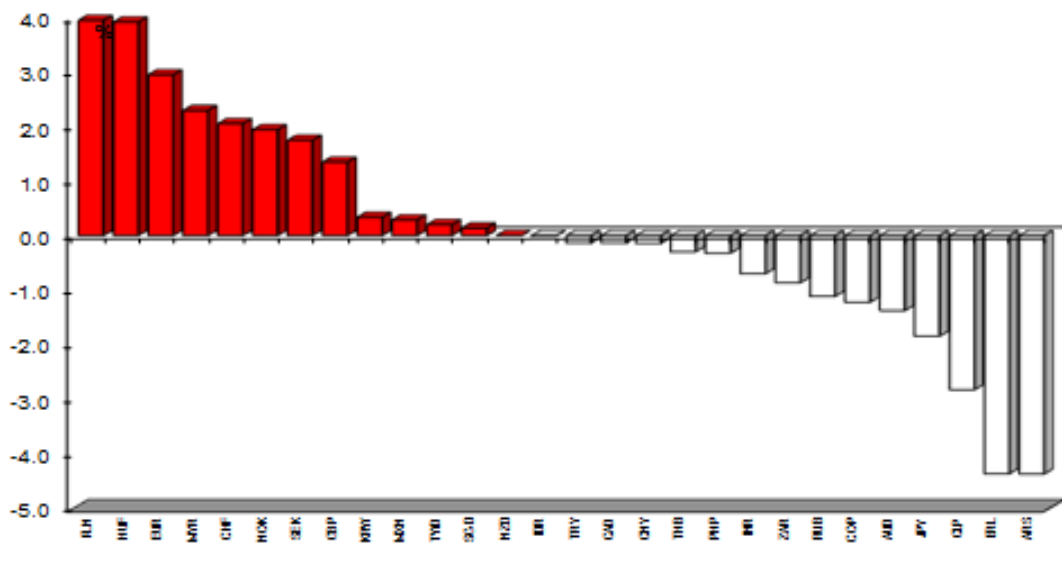
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date	Time	Event		Survey	Actual	Prior	Revised
05/23/2017	08:30	JN Nikkei Japan PMI Mfg	May P	--	52	52.7	--
05/23/2017	11:28	MU Visitor Arrivals	Apr	--	2743t	2501t	--
05/23/2017	11:28	MU CPI Composite YoY	Apr	--	0.80%	0.72%	--
05/23/2017	12:30	JN All Industry Activity Index MoM	Mar	-0.50%	-0.60%	0.70%	--
05/23/2017	13:00	JN Supermarket Sales YoY	Apr	--	0.60%	-1.80%	--
05/23/2017	13:00	SI CPI YoY	Apr	0.50%	0.40%	0.70%	--
05/23/2017	13:00	SI CPI NSA MoM	Apr	-0.10%	-0.30%	0.00%	--
05/23/2017	14:00	JN Nationwide Dept Sales YoY	Apr	--	0.70%	-0.90%	--
05/23/2017	14:00	JN Tokyo Dept Store Sales YoY	Apr	--	-0.80%	-0.20%	--
05/23/2017	14:00	JN Machine Tool Orders YoY	Apr F	--	34.70%	34.70%	--
05/23/2017	14:00	GE GDP SA QoQ	1Q F	0.60%	0.60%	0.60%	--
05/23/2017	14:00	GE GDP WDA YoY	1Q F	1.70%	1.70%	1.70%	--
05/23/2017	14:00	GE GDP NSA YoY	1Q F	2.90%	2.90%	2.90%	--
05/23/2017	14:45	FR Manufacturing Confidence	May	108	109	108	109
05/23/2017	14:45	FR Production Outlook Indicator	May	--	7	1	--
05/23/2017	15:00	FR Markit France Mfg PMI	May P	55.2	54	55.1	--
05/23/2017	15:00	FR Markit France Services PMI	May P	56.7	58	56.7	--
05/23/2017	15:00	FR Markit France Composite PMI	May P	56.6	57.6	56.6	--
05/23/2017	15:30	GE Markit/BME Germany Mfg PMI	May P	58	59.4	58.2	--
05/23/2017	15:30	GE Markit Germany Services PMI	May P	55.5	55.2	55.4	--
05/23/2017	15:30	GE Markit/BME Germany Comp PMI	May P	56.6	57.3	56.7	--
05/23/2017	16:00	TA Industrial Production YoY	Apr	4.15%	-0.59%	3.22%	3.68%
05/23/2017	16:00	EC Markit Eurozone Mfg PMI	May P	56.5	57	56.7	--
05/23/2017	16:00	EC Markit Eurozone Services PMI	May P	56.4	56.2	56.4	--
05/23/2017	16:00	EC Markit Eurozone Composite PMI	May P	56.7	56.8	56.8	--
05/23/2017	16:00	GE IFO Business Climate	May	113.1	114.6	112.9	113
05/23/2017	16:00	GE IFO Expectations	May	105.4	106.5	105.2	--
05/23/2017	16:00	GE IFO Current Assessment	May	121	123.2	121.1	121.4
05/23/2017	16:30	HK CPI Composite YoY	Apr	1.50%	2.00%	0.50%	--
05/23/2017	16:30	UK Public Finances (PSNCR)	Apr	--	-15.2b	34.3b	27.7b
05/23/2017	16:30	UK Public Sector Net Borrowing	Apr	8.0b	9.6b	4.4b	2.3b
05/23/2017	16:30	UK PSNB ex Banking Groups	Apr	8.7b	10.4b	5.1b	3.1b
05/23/2017	20:30	CA Wholesale Trade Sales MoM	Mar	0.80%	0.90%	-0.20%	0.30%
05/23/2017	21:45	US Markit US Mfg PMI	May P	53	52.5	52.8	--
05/23/2017	21:45	US Markit US Services PMI	May P	53.3	54	53.1	--
05/23/2017	21:45	US Markit US Composite PMI	May P	--	53.9	53.2	--
05/23/2017	22:00	US New Home Sales	Apr	610k	569k	621k	642k
05/23/2017	22:00	US New Home Sales MoM	Apr	-1.80%	-11.40%	5.80%	--
05/23/2017	22:00	US Richmond Fed Manufact. Index	May	15	1	20	--
05/24/2017	06:45	NZ Trade Balance NZD	Apr	267m	578m	332m	277m
05/24/2017	06:45	NZ Exports NZD	Apr	4.40b	4.75b	4.65b	4.61b
05/24/2017	06:45	NZ Imports NZD	Apr	4.10b	4.17b	4.31b	4.33b
05/24/2017	06:45	NZ Trade Balance 12 Mth YTD NZD	Apr	-3790m	-3481m	-3671m	-3710m
05/24/2017	08:30	AU Westpac Leading Index MoM	Apr	--	--	0.08%	--
05/24/2017	09:30	AU Construction Work Done	1Q	-0.50%	--	-0.20%	--
05/24/2017	13:00	JN Leading Index CI	Mar F	--	--	105.5	--
05/24/2017	13:00	JN Coincident Index	Mar F	--	--	114.6	--
05/24/2017	14:00	GE GfK Consumer Confidence	Jun	10.2	--	10.2	--
05/24/2017	15:00	TH BoT Benchmark Interest Rate	May-24	1.50%	--	1.50%	--
05/24/2017	16:00	SI Automobile COE Open Bid Cat A	May-24	--	--	51106	--
05/24/2017	16:00	SI Automobile COE Open Bid Cat B	May-24	--	--	55414	--
05/24/2017	16:00	SI Automobile COE Open Bid Cat E	May-24	--	--	55000	--
05/24/2017	19:00	US MBA Mortgage Applications	May-19	--	--	-4.10%	--
05/24/2017	21:00	US FHFA House Price Index MoM	Mar	0.50%	--	0.80%	--
05/24/2017	21:00	US House Price Purchase Index QoQ	1Q	--	--	1.50%	--
05/24/2017	22:00	CA Bank of Canada Rate Decision	May-24	0.50%	--	0.50%	--
05/24/2017	22:00	US Existing Home Sales	Apr	5.65m	--	5.71m	--
05/24/2017	22:00	US Existing Home Sales MoM	Apr	-1.10%	--	4.40%	--
05/24/2017		PH Budget Balance PHP	Apr	--	--	-61.5b	--
05/24/2017		VN CPI YoY	May	4.08%	--	4.30%	--

Source: Bloomberg

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