

Tuesday, April 25, 2017

Ringkasan Utama

- Snapshot Global:** Sentimen pasar terasa masih cukup suportif, dengan adanya pandangan pasar bahwa Emmanuel Macron kemungkinan besar akan mengungguli Marine Le Pen dalam pemilu presiden ronde ke-2 untuk Perancis pada tanggal 7 Mei. Sementara itu, pasar juga sedang mengantisipasi adanya kemungkinan pengumuman penurunan pajak oleh pemerintah Trump besok. Untuk Asia, fokus mungkin akan tersorot kepada pasar saham China yang sedang mengalami penurunan karena adanya aksi deleveraging.
- Indonesia:** Menteri Energi Ignasius Jonan, seperti yang dikutip dalam interview dengan Bloomberg, menyatakan bahwa idealnya harga minyak bumi berkisar di antara level USD50 sampai dengan USD60 per barel. Menteri tersebut juga menambahkan bahwa Indonesia belum ada rencana untuk kembali masuk ke dalam OPEC dalam waktu dekat.

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Analisa Sekilas

- FX:** EUR bertahan di level kuat terhadap mata uang major lainnya dengan adanya prestasi Emmanuel Macron yang cukup mendukung di pemilu presiden Perancis ronde pertama.

Financial Market Indicators (Indonesia)

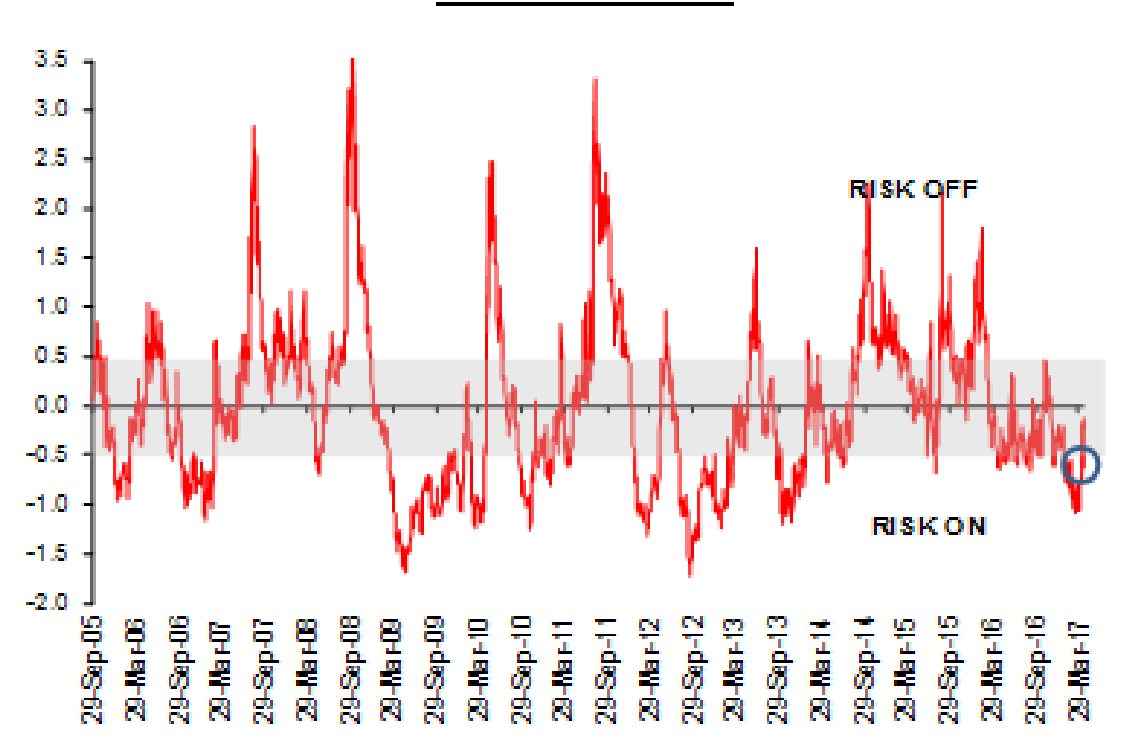
Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13310	EUR-USD	1,0868	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14352,64	GBP-USD	1,2796	DJIA	20763,89	216,13
GBP-IDR	16950,36	USD-JPY	109,77	Nasdaq	5983,82	73,30
JPY-IDR	120,69	AUD-USD	0,7571	Nikkei 225	18875,88	255,13
AUD-IDR	10076,13	NZD-USD	0,7017	STI	3144,03	4,20
CAD-IDR	9897,21	USD-CAD	1,3501	KLCI	1756,05	-
SGD-IDR	9539,46	USD-CHF	0,9958	JCI	5664,48	-
MYR-IDR	3025,40	USD-NOK	8,5485	Baltic Dry	1170,00	-25,00
JIBOR (Rupiah)				Obligasi Pemerintah (Govt Bonds)		
Tenor	Suku Bunga (%)		Tenor	Imbal Hasil (%)		
O/N	4,36		1Y	6,15		
1 Minggu	4,84		2Y	6,60		
1 Bulan	5,88		5Y	6,75		
3 Bulan	6,85		10Y	7,11		
6 Bulan	7,10		15Y	7,49		
12 Bulan	7,28		20Y	7,76		

For reference only. Source: Bloomberg, OCBC Bank

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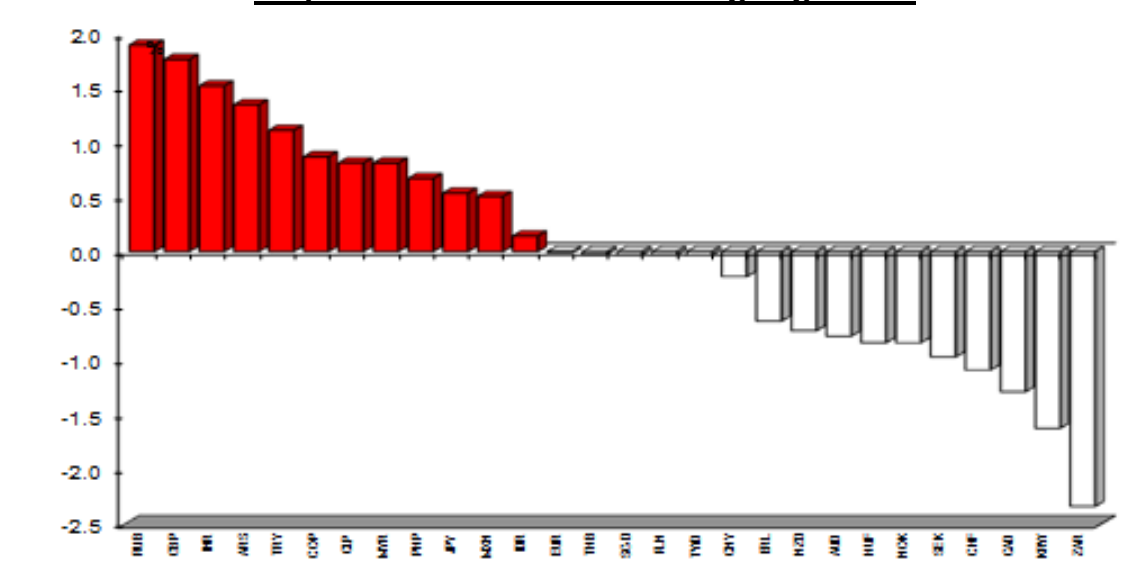
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date	Time	Event		Survey	Actual	Prior	Revised	
04/24/2017	07:01	UK	Rightmove House Prices MoM	Apr	--	1.10%	1.30%	--
04/24/2017	07:01	UK	Rightmove House Prices YoY	Apr	--	2.20%	2.30%	--
04/24/2017	08:30	TA	Unemployment Rate	Mar	3.80%	3.84%	3.83%	--
04/24/2017	11:30	TH	Customs Exports YoY	Mar	1.70%	9.22%	-2.80%	-2.76%
04/24/2017	11:30	TH	Customs Imports YoY	Mar	9.55%	19.26%	20.40%	20.36%
04/24/2017	11:30	TH	Customs Trade Balance	Mar	\$1715m	\$1617m	\$1610m	--
04/24/2017	12:09	MU	Visitor Arrivals	Mar	--	2501t	2495t	--
04/24/2017	13:00	SI	CPI YoY	Mar	0.70%	0.70%	0.70%	--
04/24/2017	13:00	SI	CPI NSA MoM	Mar	0.00%	0.00%	0.00%	--
04/24/2017	13:00	JN	Leading Index CI	Feb F	--	104.8	104.4	--
04/24/2017	16:00	TA	Industrial Production YoY	Mar	6.00%	3.22%	10.64%	10.71%
04/24/2017	16:00	GE	IFO Business Climate	Apr	112.4	112.9	112.3	112.4
04/24/2017	16:00	GE	IFO Expectations	Apr	105.9	105.2	105.7	--
04/24/2017	16:00	GE	IFO Current Assessment	Apr	119.2	121.1	119.3	119.5
04/24/2017	20:30	CA	Wholesale Trade Sales MoM	Feb	-1.00%	-0.20%	3.30%	3.00%
04/24/2017	20:30	US	Chicago Fed Nat Activity Index	Mar	0.5	0.08	0.34	0.27
04/24/2017	22:30	US	Dallas Fed Manf. Activity	Apr	17	16.8	16.9	--
04/25/2017	05:00	SK	Consumer Confidence	Apr	--	101.2	96.7	--
04/25/2017	07:50	JN	PPI Services YoY	Mar	0.70%	--	0.80%	--
04/25/2017	14:45	FR	Manufacturing Confidence	Apr	105	--	104	--
04/25/2017	16:30	HK	Exports YoY	Mar	10.00%	--	18.20%	--
04/25/2017	16:30	HK	Imports YoY	Mar	11.00%	--	25.40%	--
04/25/2017	16:30	HK	Trade Balance HKD	Mar	-53.0b	--	-56.3b	--
04/25/2017	16:30	UK	Public Finances (PSNCR)	Mar	--	--	12.9b	--
04/25/2017	16:30	UK	Public Sector Net Borrowing	Mar	1.5b	--	1.1b	--
04/25/2017	16:30	UK	PSNB ex Banking Groups	Mar	3.1b	--	1.8b	--
04/25/2017	21:00	US	FHFA House Price Index MoM	Feb	0.40%	--	0.00%	--
04/25/2017	21:00	US	S&P CL CS 20-City YoY NSA	Feb	5.77%	--	5.73%	--
04/25/2017	21:00	US	S&P CL CS 20-City NSA Index	Feb	--	--	192.81	--
04/25/2017	21:00	US	S&P CL CS US HPI YoY NSA	Feb	--	--	5.87%	--
04/25/2017	21:00	US	S&P CL CS US HPI NSA Index	Feb	--	--	185.51	--
04/25/2017	22:00	US	New Home Sales	Mar	584k	--	592k	--
04/25/2017	22:00	US	New Home Sales MoM	Mar	-1.40%	--	6.10%	--
04/25/2017	22:00	US	Conf. Board ConsConfidence	Apr	122.5	--	125.6	--
04/25/2017	22:00	US	Richmond Fed Manufact. Index	Apr	16	--	22	--
04/25/2017	04/28	TH	Car Sales	Mar	--	--	68435	--
04/25/2017	04/30	VN	Exports YTD YoY	Apr	--	--	12.80%	--
04/25/2017	04/30	VN	Imports YTD YoY	Apr	--	--	22.40%	--

Source: Bloomberg

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