

Monday, September 26, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar agak melemah dengan adanya penurunan harga minyak bumi setelah harapan bahwa rapat OPEC akan membuahkan hasil pembekuan kadar produksi minyak terkendal oleh komentar Saudi Arabia. Sementara itu, pasar juga sedang menunggu beberapa data dari ekonomi AS, termasuk data penjualan pemukiman baru.
- **Indonesia:** Gubernur Bank Indonesia, Agus Martowardojo, menyatakan bahwa BI melihat kemungkinan inflasi bulan September akan berkisar di sekitar level 3,05%yoy atau 0,2%mom. Gubernur BI juga menambahkan bahwa bank sentral akan terus mewaspadai perkembangan non-performing loans di sektor perbankan Indonesia.

OCBC NISP

Treasury Advisory

Jakarta

021-25547288 / 252 / 255

Bandung

022-7159888

Surabaya

031-5358385 / 87

Medan

061-4518328

061-4518330

061-4552356

Analisa Sekilas

- **FX:** Dolar Kanada melemah setelah adanya data inflasi bulan Agustus yang menunjukkan penurunan.

Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	12459	EUR-USD	1,1204	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14044,31	GBP-USD	1,4989	DJIA	17672,60	-141,38
GBP-IDR	18665,08	USD-JPY	117,77	Nasdaq	4757,88	7,48
JPY-IDR	105,31	AUD-USD	0,7912	Nikkei 225	17511,75	182,73
AUD-IDR	9938,77	NZD-USD	0,7450	STI	3411,50	41,21
CAD-IDR	10064,33	USD-CAD	1,2420	KLCI	1803,08	21,33
SGD-IDR	9298,82	USD-CHF	0,8801	JCI	5323,89	70,70
MYR-IDR	3460,35	USD-NOK	7,7657	Baltic Dry	720,00	-31,00
JIBOR (Rupiah)				Obligasi Pemerintah (Govt Bonds)		
Tenor	Suku Bunga (%)		Tenor	Imbal Hasil (%)		
O/N	5,84		1Y	6,68		
1 Minggu	5,95		2Y	6,89		
1 Bulan	6,53		5Y	7,06		
3 Bulan	7,11		10Y	7,28		
6 Bulan	8,00		15Y	7,49		
12 Bulan	8,17		20Y	7,54		

For reference only. Source: Bloomberg, OCBC Bank

OCBC Treasury

Research & Strategy

OCBC Bank, Singapore

Wellian Wiranto

+65 6530-5949

WellianWiranto@ocbc.com

Key Economic Indicators

Date Time	Event	Survey	Actual	Prior	Revised	
09/23/2016 08:30	JN Nikkei Japan PMI Mfg	Sep P	--	50.3	49.5	--
09/23/2016 10:58	MU Visitor Arrivals	Aug	--	2883t	2795t	--
09/23/2016 12:30	JN All Ind Activity Index MoM	Jul	0.20%	0.30%	1.00%	--
09/23/2016 13:00	SI CPI YoY	Aug	-0.40%	-0.30%	-0.70%	--
09/23/2016 13:00	SI CPI NSA MoM	Aug	0.40%	0.50%	-0.30%	--
09/23/2016 14:45	FR GDP QoQ	2Q F	0.00%	-0.10%	0.00%	--
09/23/2016 14:45	FR GDP YoY	2Q F	1.40%	1.30%	1.40%	--
09/23/2016 15:00	FR Markit FR Manufacturing PMI	Sep P	48.5	49.5	48.3	--
09/23/2016 15:00	FR Markit France Services PMI	Sep P	52	54.1	52.3	--
09/23/2016 15:00	FR Markit France Composite PMI	Sep P	51.8	53.3	51.9	--
09/23/2016 15:30	TH Foreign Reserves	Sep-16	--	\$180.0b	\$180.7b	--
09/23/2016 15:30	GE Markit/BME GE Mfg PMI	Sep P	53.1	54.3	53.6	--
09/23/2016 15:30	GE Markit Germany Services PMI	Sep P	52.1	50.6	51.7	--
09/23/2016 15:30	GE Markit/BME GE Composite PMI	Sep P	53.6	52.7	53.3	--
09/23/2016 16:00	EC Markit EC Manufacturing PMI	Sep P	51.5	52.6	51.7	--
09/23/2016 16:00	EC Markit Eurozone Services PMI	Sep P	52.8	52.1	52.8	--
09/23/2016 16:00	EC Markit EC Composite PMI	Sep P	52.8	52.6	52.9	--
09/23/2016 20:30	CA Retail Sales MoM	Jul	0.10%	-0.10%	-0.10%	0.00%
09/23/2016 20:30	CA Retail Sales Ex Auto MoM	Jul	0.50%	-0.10%	-0.80%	-0.60%
09/23/2016 20:30	CA CPI NSA MoM	Aug	0.10%	-0.20%	-0.20%	--
09/23/2016 20:30	CA CPI YoY	Aug	1.40%	1.10%	1.30%	--
09/23/2016 20:30	CA CPI Core MoM	Aug	0.20%	0.00%	0.00%	--
09/23/2016 20:30	CA CPI Core YoY	Aug	2.00%	1.80%	2.10%	--
09/23/2016 21:45	US Markit US Manufacturing PMI	Sep P	52	51.4	52	--
09/24/2016	VN CPI YoY	Sep	--	3.34%	2.57%	--
09/26/2016 05:45	NZ Exports	Aug	3.60b	3.39b	3.96b	3.97b
09/26/2016 05:45	NZ Imports	Aug	4.30b	4.65b	4.40b	4.32b
09/26/2016 11:30	TH Customs Imports YoY	Aug	-4.00%	--	-7.20%	-7.16%
09/26/2016 11:30	TH Customs Exports YoY	Aug	-1.00%	--	-6.38%	--
09/26/2016 11:30	TH Customs Trade Balance	Aug	\$1267m	--	\$1213m	\$843m
09/26/2016 13:00	SI Industrial Production YoY	Aug	0.50%	--	-3.60%	--
09/26/2016 13:00	SI Industrial Production SA MoM	Aug	1.80%	--	-4.00%	--
09/26/2016 13:00	JN Leading Index CI	Jul F	--	--	100	--
09/26/2016 16:00	GE IFO Business Climate	Sep	106.3	--	106.2	--
09/26/2016 16:00	GE IFO Current Assessment	Sep	112.9	--	112.8	--
09/26/2016 16:00	GE IFO Expectations	Sep	100.1	--	100.1	--
09/26/2016 16:00	IT Retail Sales MoM	Jul	0.00%	--	0.20%	--
09/26/2016 16:00	IT Retail Sales YoY	Jul	0.30%	--	0.80%	--
09/26/2016 16:30	UK BBA Loans for House Purchase	Aug	37100	--	37662	--
09/26/2016 22:00	US New Home Sales	Aug	600k	--	654k	--
09/26/2016 22:30	US Dallas Fed Manf. Activity	Sep	-3	--	-6.2	--
09/26/2016 09:30	VN Exports YTD YoY	Sep	--	--	5.50%	--
09/26/2016 09:30	VN GDP YTD YoY	3Q	5.86%	--	5.52%	--

Source: Bloomberg

This publication is solely for information purposes only and may not be published, circulated, reproduced or distributed in whole or in part to any other person without our prior written consent. This publication should not be construed as an offer or solicitation for the subscription, purchase or sale of the securities/instruments mentioned herein. Any forecast on the economy, stock market, bond market and economic trends of the markets provided is not necessarily indicative of the future or likely performance of the securities/instruments. Whilst the information contained herein has been compiled from sources believed to be reliable and we have taken all reasonable care to ensure that the information contained in this publication is not untrue or misleading at the time of publication, we cannot guarantee and we make no representation as to its accuracy or completeness, and you should not act on it without first independently verifying its contents. The securities/instruments mentioned in this publication may not be suitable for investment by all investors. Any opinion or estimate contained in this report is subject to change without notice. We have not given any consideration to and we have not made any investigation of the investment objectives, financial situation or particular needs of the recipient or any class of persons, and accordingly, no warranty whatsoever is given and no liability whatsoever is accepted for any loss arising whether directly or indirectly as a result of the recipient or any class of persons acting on such information or opinion or estimate. This publication may cover a wide range of topics and is not intended to be a comprehensive study or to provide any recommendation or advice on personal investing or financial planning. Accordingly, they should not be relied on or treated as a substitute for specific advice concerning individual situations. Please seek advice from a financial adviser regarding the suitability of any investment product taking into account your specific investment objectives, financial situation or particular needs before you make a commitment to purchase the investment product. OCBC and/or its related and affiliated corporations may at any time make markets in the securities/instruments mentioned in this publication and together with their respective directors and officers, may have or take positions in the securities/instruments mentioned in this publication and may be engaged in purchasing or selling the same for themselves or their clients, and may also perform or seek to perform broking and other investment or securities-related services for the corporations whose securities are mentioned in this publication as well as other parties generally.

Co.Reg.no.:193200032W