

Wednesday, July 27, 2016

Ringkasan Utama

- **Snapshot Global:** Pasar masih sedang menunggu arahan dari rapat moneter BOJ dan Federal Reserve minggu ini. Tersebar kabar bahwa pemerintah Jepang akan menambah stimulus fiskal yang akan mengkomplementasi kemungkinan stimulus moneter dari BOJ. Sementara itu, pasar juga mencermati adanya data AS yang menunjukkan perbaikan dalam sektor pemukiman, di mana data penjualan perumahan baru meningkat dengan kadar lebih dari antisipasi.
- **Indonesia:** Kompas melaporkan bahwa Presiden Joko Widodo dijangka akan melakukan reshuffle kabinet pada jam 3 hari ini. Laporan tersebut menyatakan bahwa akan ada 8 menteri baru yang dimasukkan ke dalam kabinet dengan 4 posisi baru. Sementara itu, Golkar dan PAN akan mendapatkan jatah satu kementerian masing-masing.

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Analisa Sekilas

- **FX:** AUD kembali menguat untuk ketiga harinya dengan adanya antisipasi pasar bahwa bank sentral Australia akan menahan suku bunga minggu depan.

Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	13175	EUR-USD	1,0986	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14506,50	GBP-USD	1,3130	DJIA	18473,75	-19,31
GBP-IDR	17285,80	USD-JPY	104,66	Nasdaq	5110,05	12,42
JPY-IDR	126,31	AUD-USD	0,7502	Nikkei 225	16383,04	-237,25
AUD-IDR	9909,71	NZD-USD	0,7054	STI	2933,44	3,59
CAD-IDR	9965,92	USD-CAD	1,3188	KLCI	1661,42	-6,84
SGD-IDR	9705,81	USD-CHF	0,9924	JCI	5224,40	3,59
MYR-IDR	3242,28	USD-NOK	8,5696	Baltic Dry	696,00	-13,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)		Tenor	Imbal Hasil (%)		
O/N	4,65		1Y	6,62		
1 Minggu	5,35		2Y	6,74		
1 Bulan	6,20		5Y	6,93		
3 Bulan	7,17		10Y	7,11		
6 Bulan	7,43		15Y	7,37		
12 Bulan	7,71		20Y	7,51		

For reference only. Source: Bloomberg, OCBC Bank

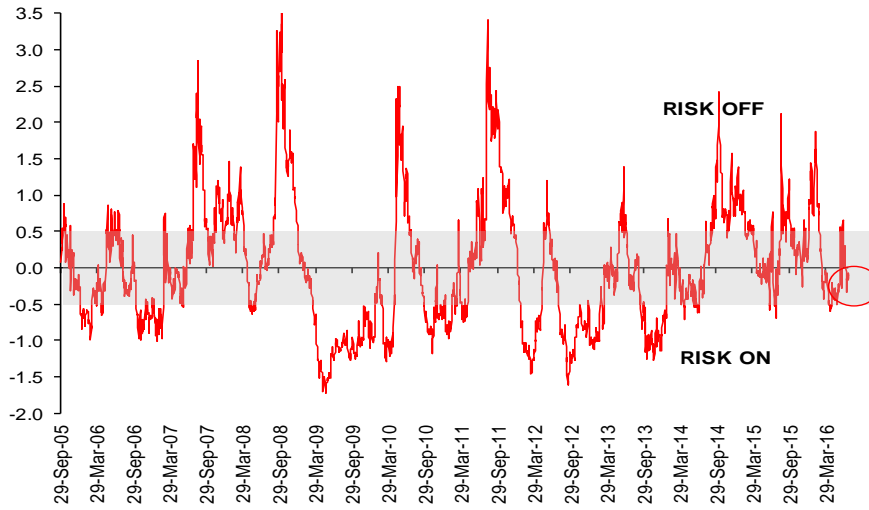
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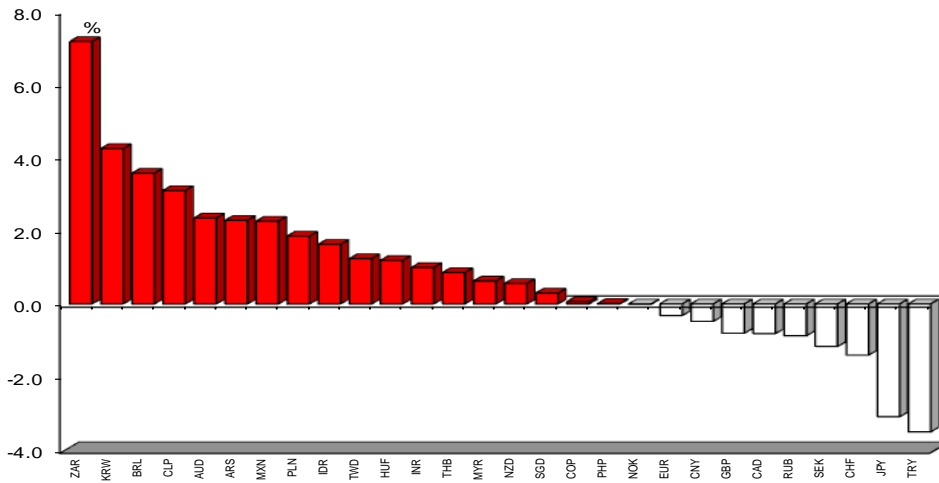
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time	Event	Survey	Actual	Prior	Revised	
07/26/2016 06:45	NZ Trade Balance	Jun	150m	127m	358m	348m
07/26/2016 06:45	NZ Exports	Jun	4.22b	4.26b	4.57b	4.56b
07/26/2016 06:45	NZ Imports	Jun	4.13b	4.13b	4.22b	4.21b
07/26/2016 07:00	SK GDP YoY	2Q P	3.00%	3.20%	2.80%	--
07/26/2016 07:00	SK GDP SA QoQ	2Q P	0.60%	0.70%	0.50%	--
07/26/2016 09:00	PH Imports YoY	May	26.60%	39.30%	29.20%	29.80%
07/26/2016 09:00	PH Trade Balance	May	-\$1500m	-\$2021m	-\$2275m	-\$2306m
07/26/2016 13:00	SI Industrial Production YoY	Jun	0.50%	-0.30%	0.90%	0.80%
07/26/2016 13:00	SI Industrial Production SA MoM	Jun	-1.40%	-2.50%	-0.40%	--
07/26/2016 16:30	UK BBA Loans for House Purchase	Jun	39650	40103	42187	41842
07/26/2016 16:30	HK Exports YoY	Jun	-1.60%	-1.00%	-0.10%	--
07/26/2016 16:30	HK Imports YoY	Jun	-5.00%	-0.90%	-4.30%	--
07/26/2016 16:30	HK Trade Balance	Jun	-34.7b	-45.6b	-26.2b	--
07/26/2016 21:45	US Markit US Services PMI	Jul P	52	50.9	51.4	--
07/26/2016 21:45	US Markit US Composite PMI	Jul P	--	51.5	51.2	--
07/26/2016 22:00	US Consumer Confidence Index	Jul	96	97.3	98	97.4
07/26/2016 22:00	US Richmond Fed Manuf. Index	Jul	-5	10	-7	-10
07/26/2016 22:00	US New Home Sales	Jun	560k	592k	551k	572k
07/26/2016 22:00	US New Home Sales MoM	Jun	1.60%	3.50%	-6.00%	0.00%
07/27/2016 08:30	PH Budget Balance PHP	Jun	--	--	--	--
07/27/2016 09:30	AU CPI QoQ	2Q	0.40%	--	-0.20%	--
07/27/2016 09:30	AU CPI YoY	2Q	1.10%	--	1.30%	--
07/27/2016 09:30	AU CPI Trimmed Mean QoQ	2Q	0.40%	--	0.20%	--
07/27/2016 09:30	AU CPI Trimmed Mean YoY	2Q	1.50%	--	1.70%	--
07/27/2016 12:00	TH Customs Exports YoY	Jun	-2.60%	--	-4.40%	--
07/27/2016 12:00	TH Customs Imports YoY	Jun	-8.90%	--	0.50%	--
07/27/2016 12:00	TH Customs Trade Balance	Jun	\$1499m	--	\$1540m	--
07/27/2016 13:00	JN Small Business Confidence	Jul	--	--	46.5	--
07/27/2016 14:00	GE Import Price Index MoM	Jun	0.60%	--	0.90%	--
07/27/2016 14:00	GE Import Price Index YoY	Jun	-4.60%	--	-5.50%	--
07/27/2016 14:00	GE GfK Consumer Confidence	Aug	9.9	--	10.1	--
07/27/2016 14:45	FR Consumer Confidence	Jul	96	--	97	--
07/27/2016 14:45	FR PPI MoM	Jun	--	--	0.30%	--
07/27/2016 14:45	FR PPI YoY	Jun	--	--	-3.50%	-3.40%
07/27/2016 16:00	EC M3 Money Supply YoY	Jun	5.00%	--	4.90%	--
07/27/2016 16:00	IT Consumer Confidence Index	Jul	109.2	--	110.2	--
07/27/2016 16:00	IT Manufacturing Confidence	Jul	102	--	102.8	--
07/27/2016 16:00	IT Economic Sentiment	Jul	--	--	101.2	--
07/27/2016 16:30	UK GDP QoQ	2Q A	0.50%	--	0.40%	--
07/27/2016 16:30	UK GDP YoY	2Q A	2.10%	--	2.00%	--
07/27/2016 19:00	US MBA Mortgage Applications	Jul-22	--	--	-1.30%	--
07/27/2016 20:30	US Durable Goods Orders	Jun P	-1.40%	--	-2.30%	--
07/27/2016 20:30	US Durables Ex Transportation	Jun P	0.30%	--	-0.30%	--
07/27/2016 20:30	US Cap Goods Ship Nondef Ex Air	Jun P	0.40%	--	-0.50%	--
07/27/2016 22:00	US Pending Home Sales MoM	Jun	1.20%	--	-3.70%	--
07/27/2016	MU Unemployment Rate	Jun	--	--	1.90%	--
07/26/2016 07/31	VN Exports YTD YoY	Jul	5.60%	--	5.90%	--

Source: Bloomberg

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