

Monday, November 28, 2016

Ringkasan Utama

- Snapshot Global:** Pasar Asia sedang mencermati berita dari OPEC yang menyebabkan harga minyak bumi kembali melemah pagi ini. Antisipasi terhadap kemungkinan pemangkasan produksi minyak bumi semakin minim, dengan masih adanya perbedaan pendapat antara anggota kartel tersebut mengenai pembagian penurunan produksi. Sementara itu, untuk minggu kedepan, pasar juga akan fokus kepada data nonfarm payrolls dari AS yang akan keluar akhir minggu ini. Konsensus pasar menganggap bahwa akan ada penciptaan lapangan kerja sebanyak 175rb, dibandingkan 161rb untuk bulan sebelumnya.
- Indonesia:** Bank Indonesia mengatakan bahwa inflasi November mungkin akan bergerak di antara level 3,0 dan 3,2%yoy. Menurut tinjauan BI, inflasi untuk bulan November sampai minggu ke-3 berkisar di sekitar level 0,35% mom. Kenaikan harga tersebut dikarenakan adanya kesulitan panen yang menyebabkan lebih mahalnya harga cabe dan bawang.

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Analisa Sekilas

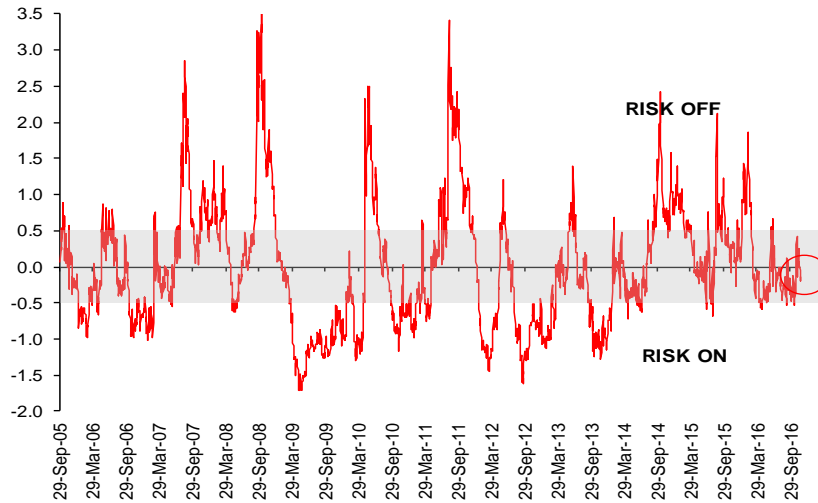
- FX:** USD melemah terhadap JPY dengan kadar terbesar dalam dua bulan belakangan, dengan adanya pandangan pasar bahwa penguatan dolar sebelumnya sudah mencapai batas teknikal tertentu.

Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	13525	EUR-USD	1,0589	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14340,11	GBP-USD	1,2477	DJIA	19152,14	68,96
GBP-IDR	16818,45	USD-JPY	113,22	Nasdaq	5398,92	18,24
JPY-IDR	119,82	AUD-USD	0,7443	Nikkei 225	18381,22	47,81
AUD-IDR	10075,23	NZD-USD	0,7043	STI	2859,33	15,61
CAD-IDR	10028,76	USD-CAD	1,3519	KLCI	1627,26	3,05
SGD-IDR	9469,18	USD-CHF	1,0141	JCI	5122,10	14,48
MYR-IDR	3033,70	USD-NOK	8,5805	Baltic Dry	1181,00	-20,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)			
O/N	4,20	1Y	7,37			
1 Minggu	4,87	2Y	7,96			
1 Bulan	6,11	5Y	8,33			
3 Bulan	7,01	10Y	8,32			
6 Bulan	7,23	15Y	8,45			
12 Bulan	7,40	20Y	8,44			

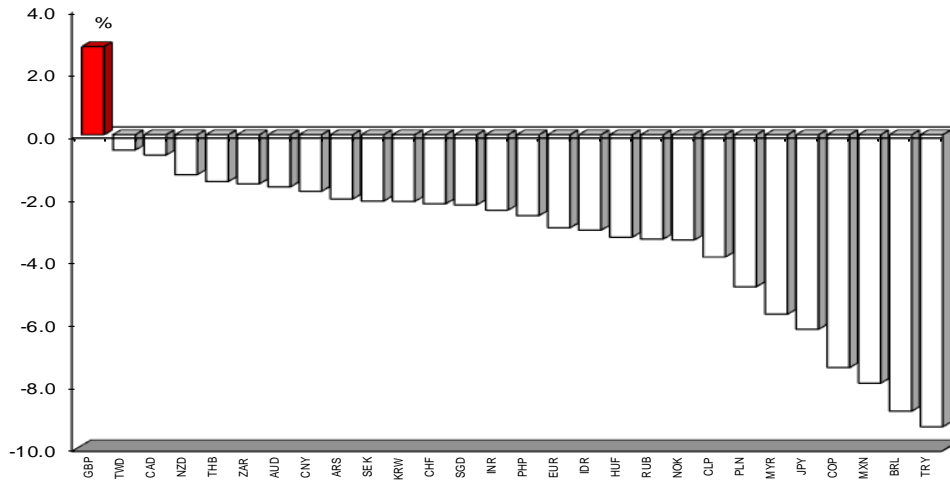
For reference only. Source: Bloomberg, OCBC Bank

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
11/25/2016	05:00	SK Consumer Confidence	Nov	--	95.8	101.9	--
11/25/2016	05:45	NZ Trade Balance NZD	Oct	-971m	-846m	-1436m	-1394m
11/25/2016	05:45	NZ Exports NZD	Oct	3.76b	3.90b	3.47b	3.47b
11/25/2016	05:45	NZ Imports NZD	Oct	4.66b	4.74b	4.90b	4.86b
11/25/2016	07:30	JN Natl CPI YoY	Oct	0.00%	0.10%	-0.50%	--
11/25/2016	07:30	JN Natl CPI Ex Fresh Food YoY	Oct	-0.40%	-0.40%	-0.50%	--
11/25/2016	07:30	JN Natl CPI Ex Food, Energy YoY	Oct	0.10%	0.20%	0.00%	--
11/25/2016	07:30	JN Tokyo CPI YoY	Nov	0.20%	0.50%	0.10%	--
11/25/2016	07:30	JN Tokyo CPI Ex-Fresh Food YoY	Nov	-0.40%	-0.40%	-0.40%	--
11/25/2016	07:30	JN Tokyo CPI Ex Food, Energy YoY	Nov	0.00%	0.00%	0.10%	--
11/25/2016	07:50	JN Japan Buying Foreign Bonds	Nov-18	--	¥260.6b	¥466.2b	--
11/25/2016	07:50	JN Foreign Buying Japan Bonds	Nov-18	--	¥1106.8b	¥421.9b	¥420.1b
11/25/2016	07:50	JN Japan Buying Foreign Stocks	Nov-18	--	¥672.4b	¥338.6b	¥339.8b
11/25/2016	07:50	JN Foreign Buying Japan Stocks	Nov-18	--	¥461.7b	¥545.8b	¥546.0b
11/25/2016	12:00	MA CPI YoY	Oct	1.50%	1.40%	1.50%	--
11/25/2016	13:00	SI Industrial Production YoY	Oct	1.00%	1.20%	6.70%	7.70%
11/25/2016	13:00	SI Industrial Production SA MoM	Oct	-2.10%	-0.10%	3.30%	4.10%
11/25/2016	15:30	TH Foreign Reserves	Nov-18	--	\$177.2b	\$179.8b	--
11/25/2016	15:45	FR Consumer Confidence	Nov	98	98	98	--
11/25/2016	16:15	TA GDP YoY	3Q F	2.10%	2.03%	2.06%	--
11/25/2016	17:00	IT Industrial Orders MoM	Sep	--	-6.80%	10.20%	10.70%
11/25/2016	17:00	IT Industrial Orders NSA YoY	Sep	--	2.60%	15.90%	16.50%
11/25/2016	17:30	UK GDP QoQ	3Q P	0.50%	0.50%	0.50%	--
11/25/2016	17:30	UK GDP YoY	3Q P	2.30%	2.30%	2.30%	--
11/25/2016	18:00	IT Retail Sales MoM	Sep	0.20%	-0.60%	-0.10%	-0.20%
11/25/2016	18:00	IT Retail Sales YoY	Sep	-0.10%	-1.40%	-0.20%	-0.50%
11/25/2016	21:30	US Wholesale Inventories MoM	Oct P	0.20%	-0.40%	0.10%	-0.10%
11/25/2016	22:45	US Markit US Services PMI	Nov P	54.8	54.7	54.8	--
11/25/2016	22:45	US Markit US Composite PMI	Nov P	--	54.9	54.9	--
11/28/2016	12:00	TH Customs Imports YoY	Oct	2.00%	--	5.60%	--
11/28/2016	12:00	TH Customs Exports YoY	Oct	1.40%	--	3.40%	--
11/28/2016	12:00	TH Customs Trade Balance	Oct	\$1940m	--	\$2546m	--
11/28/2016	17:00	EC M3 Money Supply YoY	Oct	5.00%	--	5.00%	--
11/28/2016	17:00	IT Consumer Confidence Index	Nov	107.6	--	108	--
11/28/2016	17:00	IT Manufacturing Confidence	Nov	103	--	103	--
11/28/2016	17:00	IT Economic Sentiment	Nov	--	--	102.4	--
11/28/2016	23:30	US Dallas Fed Manf. Activity	Nov	1.5	--	-1.5	--
11/28/2016		MU Unemployment Rate	Oct	--	--	1.90%	--
11/28/2016	11/30	VN Exports YTD YoY	Nov	7.00%	--	7.20%	--
11/28/2016	11/30	VN CPI YoY	Nov	4.30%	--	4.09%	--

Source: Bloomberg

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