

Wednesday, June 29, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar terasa agak relatif stabil kemarin. Walaupun pasar masih mengalami gejolak volatilitas akibat referendum Brexit hari Jumat kemarin, adanya antisipasi bahwa bank sentral dunia akan menambahkan stimulus mulai memberikan sedikit pegangan untuk sentimen pasar.
- **Indonesia:** DPR akhirnya mengesahkan UU Pengampunan Pajak kemarin. Tarif pajak tebusan ditetapkan di antara 2% sampai 10%, dan amnesti tersebut akan berlaku dari tanggal 1 Juli tahun ini sampai akhir Maret tahun depan. Sementara itu, perusahaan kecil dengan peredaran usaha sampai dengan IDR4,8 miliar dapat mengikuti skema ini dengan tarif tebusan 0,5% (untuk nilai harta sampai dengan IDR 10 miliar) atau 2,0% (untuk nilai harta melampaui IDR 10 miliar).

OCBC NISP

Treasury Advisory

Jakarta

Tel: 021-25547288 / 252 / 255

Bandung

Tel: 022-7159888

Surabaya

Tel: 031-5358385 / 87

Medan

Tel: 061-4518328

Tel: 061-4518330

Tel: 061-4552356

Analisa Sekilas

- **FX:** Rupiah cenderung menguat terhadap USD kemarin, dengan relatif stabilnya pasar mata uang dan juga adanya berita tentang UU Pengampunan Pajak yang disambut baik oleh pasar.

Financial Market Indicators (Indonesia)

Nilai Mata Uang			Bursa Saham dan Komoditas			
USD-IDR	13188	EUR-USD	1,1065	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14580,90	GBP-USD	1,3344	DJIA	17409,72	8,97
GBP-IDR	17539,76	USD-JPY	102,75	Nasdaq	4691,87	-16,11
JPY-IDR	129,16	AUD-USD	0,7386	Nikkei 225	15323,14	371,12
AUD-IDR	9757,51	NZD-USD	0,7047	STI	2756,53	21,14
CAD-IDR	10157,26	USD-CAD	1,3025	KLCI	1634,04	-0,01
SGD-IDR	9725,07	USD-CHF	0,9819	JCI	4882,17	47,60
MYR-IDR	3234,53	USD-NOK	8,4764	Baltic Dry	627,00	18,00
JIBOR (Rupiah)			Obligasi Pemerintah (Govt Bonds)			
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)			
O/N	5,26	1Y	6,89			
1 Minggu	5,93	2Y	7,21			
1 Bulan	6,56	5Y	7,45			
3 Bulan	7,17	10Y	7,59			
6 Bulan	7,48	15Y	7,80			
12 Bulan	7,77	20Y	7,86			

For reference only. Source: Bloomberg, OCBC Bank

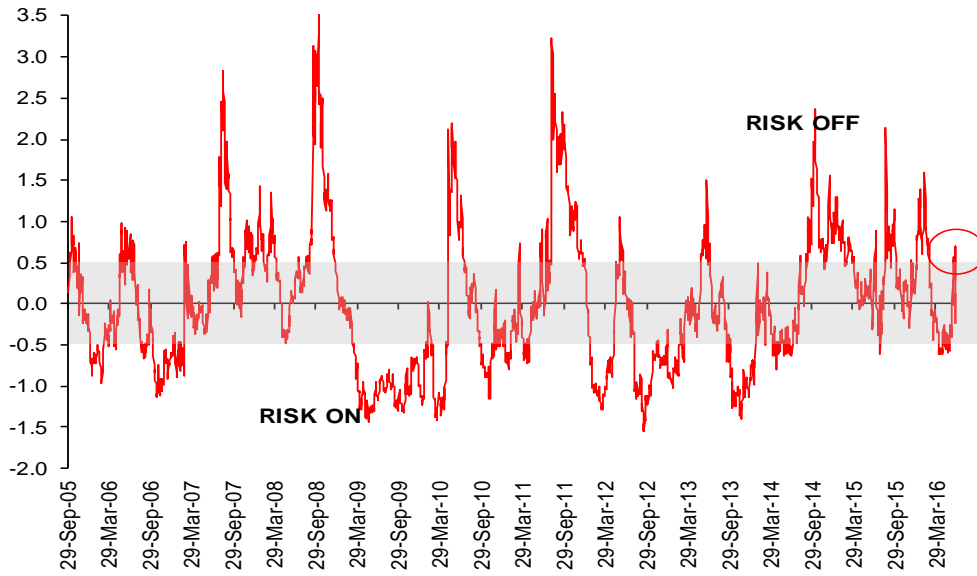
OCBC Treasury Research &
Strategy
OCBC Bank, Singapore

Wellian Wiranto

Tel: +65 6530-5949

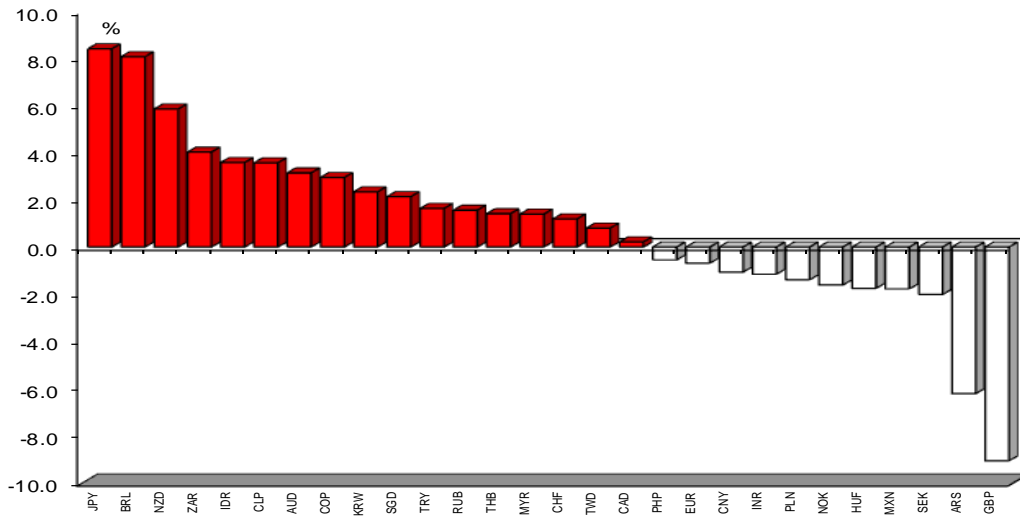
WellianWiranto@ocbc.com

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	
06/28/2016 09:55	VN GDP YTD YoY	2Q	5.83%	5.52%	5.46%	--
06/28/2016 10:00	VN Exports YTD YoY	Jun	6.50%	5.90%	6.60%	--
06/28/2016 14:00	GE Import Price Index MoM	May	0.60%	0.90%	-0.10%	--
06/28/2016 14:00	GE Import Price Index YoY	May	-5.80%	-5.50%	-6.60%	--
06/28/2016 14:45	FR Consumer Confidence	Jun	97	97	98	--
06/28/2016 16:00	IT Consumer Confidence Index	Jun	112.5	110.2	112.7	112.5
06/28/2016 16:00	IT Manufacturing Confidence	Jun	102.1	102.8	102.1	--
06/28/2016 16:00	IT Economic Sentiment	Jun	--	101.2	103.4	103
06/28/2016 20:30	US GDP Annualized QoQ	1Q T	1.00%	1.10%	0.80%	--
06/28/2016 20:30	US Personal Consumption	1Q T	2.00%	1.50%	1.90%	--
06/28/2016 20:30	US GDP Price Index	1Q T	0.60%	0.40%	0.60%	--
06/28/2016 20:30	US Core PCE QoQ	1Q T	2.10%	2.00%	2.10%	--
06/28/2016 22:00	US Consumer Confidence Index	Jun	93.5	98	92.6	92.4
06/28/2016 22:00	US Richmond Fed Manufact. Index	Jun	3	-7	-1	--
06/29/2016 05:00	SK Business Survey Manufacturing	Jul	--	72	74	--
06/29/2016 07:50	JN Retail Trade YoY	May	-1.60%	-1.90%	-0.80%	-0.90%
06/29/2016 07:50	JN Retail Sales MoM	May	0.00%	0.00%	0.00%	-0.10%
06/29/2016 09:00	AU HIA New Home Sales MoM	May	--	--	-4.70%	--
06/29/2016 10:00	SK Discount Store Sales YoY	May	--	--	1.70%	--
06/29/2016 10:00	SK Department Store Sales YoY	May	--	--	4.30%	--
06/29/2016 11:00	PH Budget Balance PHP	Apr	--	--	-74.4b	--
06/29/2016 13:00	JN Small Business Confidence	Jun	46	--	45.6	--
06/29/2016 14:00	GE GfK Consumer Confidence	Jul	9.8	--	9.8	--
06/29/2016 14:00	UK Nationwide House PX MoM	Jun	0.00%	--	0.20%	--
06/29/2016 15:00	GE CPI Saxony MoM	Jun	--	--	0.40%	--
06/29/2016 16:30	UK Mortgage Approvals	May	65.3k	--	66.3k	--
06/29/2016 16:30	UK Money Supply M4 MoM	May	--	--	-0.10%	--
06/29/2016 16:30	UK M4 Money Supply YoY	May	--	--	1.00%	--
06/29/2016 17:00	EC Economic Confidence	Jun	104.7	--	104.7	--
06/29/2016 17:00	EC Consumer Confidence	Jun F	-7.3	--	-7.3	--
06/29/2016 19:00	US MBA Mortgage Applications	Jun-24	--	--	2.90%	--
06/29/2016 20:00	GE CPI MoM	Jun P	0.20%	--	0.30%	--
06/29/2016 20:00	GE CPI YoY	Jun P	0.30%	--	0.10%	--
06/29/2016 20:00	GE CPI EU Harmonized MoM	Jun P	0.10%	--	0.40%	--
06/29/2016 20:00	GE CPI EU Harmonized YoY	Jun P	0.20%	--	0.00%	--
06/29/2016 20:30	US Personal Income	May	0.30%	--	0.40%	--
06/29/2016 20:30	US Personal Spending	May	0.40%	--	1.00%	--
06/29/2016 20:30	US PCE Core MoM	May	0.20%	--	0.20%	--
06/29/2016 22:00	US Pending Home Sales MoM	May	-1.10%	--	5.10%	--
06/29/2016	MU Hotel Occupancy Rate	May	--	--	79	--

Source: Bloomberg

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