

Thursday, June 30, 2016

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar terasa masih relatif stabil. Pasar Inggris yang sebelumnya mengalami gejolak setelah referendum Brexit minggu lalu juga mulai mengalami pemulihan. Sementara itu, pasar juga mencermati adanya berita bahwa Federal Reserve telah melakukan stress test untuk sektor perbankan mereka, yang menunjukkan bahwa mayoritas bank-bank telah lulus.
- **Indonesia:** Deputi Gubernur Perry Warjiyo dari Bank Indonesia menyatakan bahwa bank sentral Indonesia tersebut melihat bahwa masih ada ruangan untuk melonggarkan kebijakan moneter dan makroprudensial kedepan. Hal ini dikarenakan adanya program pengampunan pajak yang diperkirakan dapat membawakan pertumbuhan ekonomi yang lebih baik, inflasi yang lebih terjaga dan Rupiah yang lebih kuat.

Analisa Sekilas

- **FX:** Rupiah masih cenderung menguat dengan adanya stabilisasi sentimen pasar global, dan juga adanya sambutan baik pasar tentang tax amnesty.

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Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13157	EUR-USD	1,1125	Index	Nilai Indeks/Harga	Nett
EUR-IDR	14554,99	GBP-USD	1,3429	DJIA	17694,68	293,93
GBP-IDR	17621,15	USD-JPY	102,83	Nasdaq	4779,25	71,27
JPY-IDR	128,28	AUD-USD	0,7451	Nikkei 225	15566,83	614,81
AUD-IDR	9748,57	NZD-USD	0,7113	STI	2792,73	57,34
CAD-IDR	10132,67	USD-CAD	1,2935	KLCI	1642,21	8,16
SGD-IDR	9752,85	USD-CHF	0,9797	JCI	4980,11	145,54
MYR-IDR	3256,28	USD-NOK	8,3935	Baltic Dry	640,00	31,00
JIBOR (Rupiah)				Obligasi Pemerintah (Govt Bonds)		
Tenor	Suku Bunga (%)			Tenor	Imbal Hasil (%)	
O/N	5,20			1Y	6,84	
1 Minggu	6,05			2Y	7,22	
1 Bulan	6,70			5Y	7,35	
3 Bulan	7,21			10Y	7,49	
6 Bulan	7,50			15Y	7,69	
12 Bulan	7,77			20Y	7,75	

For reference only. Source: Bloomberg, OCBC Bank

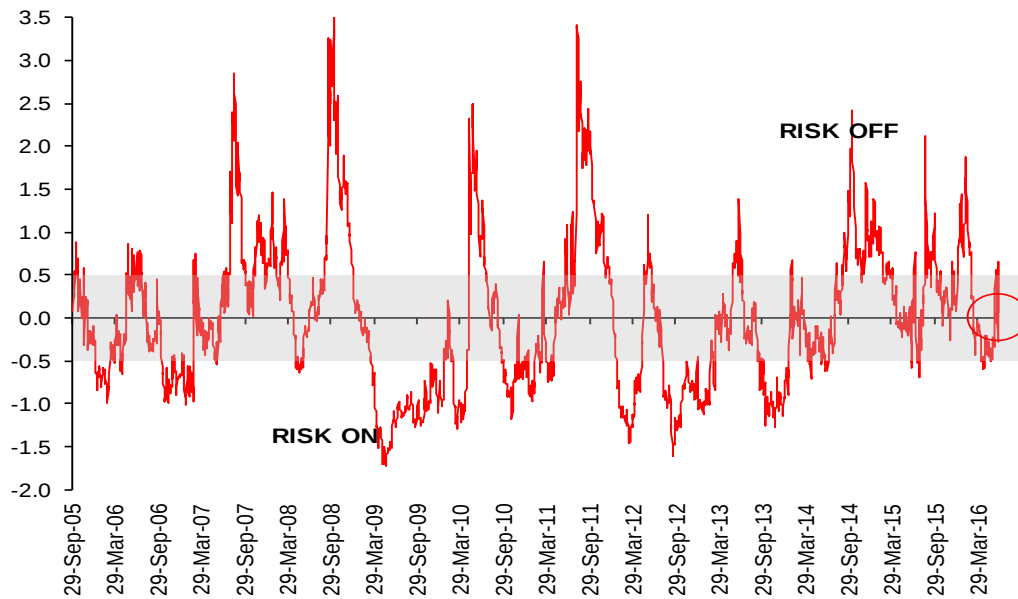
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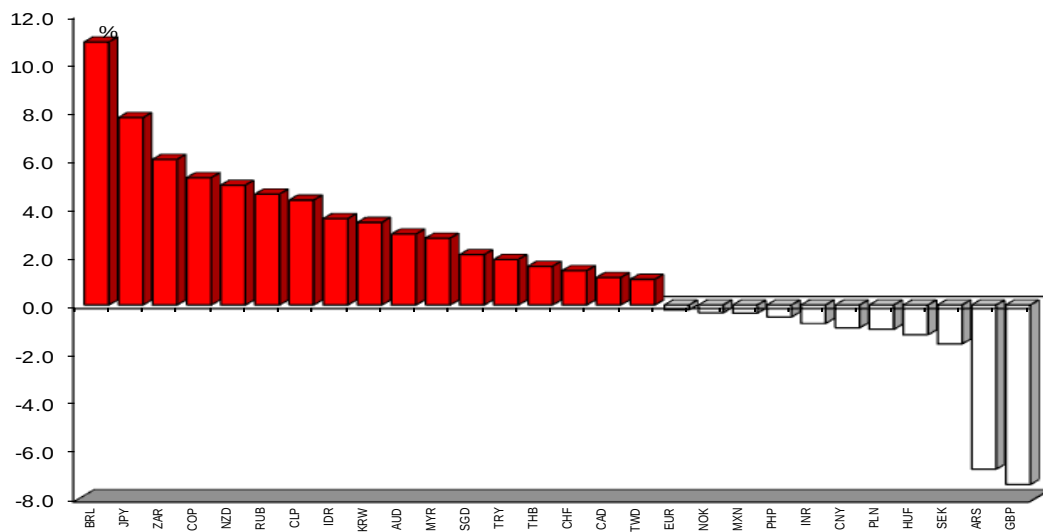
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FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time	Event	Survey	Actual	Prior	Revised
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%
06/29/2016 07:50	JN Retail Sales MoM	May	0.00%	0.00%	0.00%
06/29/2016 09:00	AU HIA New Home Sales MoM	May	--	-4.40%	-4.70%
06/29/2016 10:00	SK Department Store Sales YoY	May	--	-2.70%	4.30%
06/29/2016 11:00	PH Budget Balance PHP	Apr	--	55.0b	-74.4b
06/29/2016 13:00	JN Small Business Confidence	Jun	46.1	46.5	45.6
06/29/2016 14:00	GE GfK Consumer Confidence	Jul	9.8	10.1	9.8
06/29/2016 14:00	UK Nationwide House PX MoM	Jun	0.00%	0.20%	0.20%
06/29/2016 14:40	MU Hotel Occupancy Rate	May	--	79.3	79
06/29/2016 16:30	UK Mortgage Approvals	May	65.3k	67.0k	66.3k
06/29/2016 16:30	UK Money Supply M4 MoM	May	--	1.20%	-0.10%
06/29/2016 17:00	EC Economic Confidence	Jun	104.7	104.4	104.7
06/29/2016 17:00	EC Consumer Confidence	Jun F	-7.3	-7.3	-7.3
06/29/2016 19:00	US MBA Mortgage Applications	Jun-24	--	-2.60%	2.90%
06/29/2016 20:00	GE CPI MoM	Jun P	0.20%	0.10%	0.30%
06/29/2016 20:00	GE CPI YoY	Jun P	0.30%	0.30%	0.10%
06/29/2016 20:00	GE CPI EU Harmonized MoM	Jun P	0.10%	0.10%	0.40%
06/29/2016 20:00	GE CPI EU Harmonized YoY	Jun P	0.20%	0.20%	0.00%
06/29/2016 20:30	US Personal Income	May	0.30%	0.20%	0.40%
06/29/2016 20:30	US Personal Spending	May	0.40%	0.40%	1.00%
06/29/2016 20:30	US PCE Core MoM	May	0.20%	0.20%	0.20%
06/29/2016 22:00	US Pending Home Sales MoM	May	-1.10%	-3.70%	5.10%
06/30/2016 06:45	NZ Building Permits MoM	May	--	-0.90%	6.60%
06/30/2016 07:00	SK Industrial Production SA MoM	May	0.30%	2.50%	-1.30%
06/30/2016 07:00	SK Industrial Production YoY	May	0.30%	4.30%	-2.80%
06/30/2016 07:05	UK GfK Consumer Confidence	Jun	-2	-1	-1
06/30/2016 07:50	JN Industrial Production MoM	May P	-0.20%	-2.30%	0.50%
06/30/2016 07:50	JN Industrial Production YoY	May P	1.90%	-0.10%	-3.30%
06/30/2016 09:00	NZ ANZ Business Confidence	Jun	--	--	11.3
06/30/2016 09:30	AU Private Sector Credit MoM	May	0.50%	--	0.50%
06/30/2016 11:00	NZ Money Supply M3 YoY	May	--	--	7.80%
06/30/2016 13:00	JN Housing Starts YoY	May	4.80%	--	9.00%
06/30/2016 14:00	GE Retail Sales MoM	May	0.60%	--	-0.90%
06/30/2016 14:45	FR PPI YoY	May	--	--	-4.10%
06/30/2016 14:45	FR CPI EU Harmonized YoY	Jun P	0.30%	--	0.10%
06/30/2016 14:45	FR CPI MoM	Jun P	0.20%	--	0.40%
06/30/2016 14:45	FR CPI YoY	Jun P	0.20%	--	0.00%
06/30/2016 15:30	TH Foreign Reserves	Jun-24	--	--	\$179.7b
06/30/2016 15:30	TH Exports YoY	May	--	--	-7.60%
06/30/2016 15:30	TH Trade Balance	May	--	--	\$2450m
06/30/2016 15:30	TH BoP Current Account Bal	May	\$3112m	--	\$3164m
06/30/2016 15:55	GE Unemp Change (000's)	Jun	-5k	--	-11k
06/30/2016 15:55	GE Unemployment Claims Rate SA	Jun	6.10%	--	6.10%
06/30/2016 16:30	HK Retail Sales Value YoY	May	-8.80%	--	-7.50%
06/30/2016 16:30	HK Retail Sales Volume YoY	May	-8.00%	--	-7.60%
06/30/2016 16:30	UK GDP QoQ	1Q F	0.40%	--	0.40%
06/30/2016 16:30	UK GDP YoY	1Q F	2.00%	--	2.00%
06/30/2016 17:00	EC CPI Estimate YoY	Jun	0.00%	--	-0.10%
06/30/2016 17:00	EC CPI Core YoY	Jun A	0.80%	--	0.80%
06/30/2016 17:00	IT CPI NIC incl. tobacco MoM	Jun P	0.20%	--	0.30%
06/30/2016 17:00	IT CPI EU Harmonized MoM	Jun P	0.20%	--	0.30%
06/30/2016 17:00	IT CPI EU Harmonized YoY	Jun P	-0.20%	--	-0.30%
06/30/2016 18:00	IT PPI MoM	May	--	--	-0.90%
06/30/2016 20:30	US Initial Jobless Claims	Jun-25	267k	--	259k
06/30/2016 20:30	CA GDP MoM	Apr	0.10%	--	-0.20%
06/30/2016 20:30	US Continuing Claims	Jun-18	2151k	--	2142k
06/30/2016 20:30	CA Industrial Product Price MoM	May	0.30%	--	-0.50%
06/30/2016 21:45	US Bloomberg Consumer Comfort	Jun-26	--	--	44.2
06/30/2016	TA CBC Benchmark Interest Rate	Jun-30	1.38%	--	1.50%

Source: Bloomberg

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