Ringkasan Harian Pasar Finansial

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Friday, March 31, 2017

Ringkasan Utama

- **Snapshot Global:** Sentimen pasar global agak pulih sedikit dengan adanya data PDB AS untuk Q4 tahun lalu yang direvisi ke atas. Hal ini membawakan adanya kenaikan harga saham AS maupun harga minyak bumi dunia. Untuk hari ini, pasar akan fokus kepada data dari AS termasuk indeks sentiment konsumen AS dari University of Michigan.

- **Indonesia:** Depkeu mengatakan bahwa ada dana sebesar IDR29tn yang gagal direpatriasi dalam rangka program tax amnesty. Dibandingkan IDR141tn yang telah komitmen untuk repatriasi, hanya IDR112tn yang masuk ke Indonesia untuk sementara waktu. Hal ini seperti yang dikutip oleh harian Kompas hari ini.

Analisa Sekilas

- **FX:** USD menguat ke level terbaik terhadap mata uang major lainnya dalam dua minggu belakangan, dengan adanya dukungan dari data makroekonomi AS.

Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
				Index	**Nilai Indeks/Harga**	**Nett**
USD-IDR	13316	**EUR-USD**	1,0674	**DJIA**	20728,49	69,17
EUR-IDR	14295,95	**GBP-USD**	1,2468	**Nasdaq**	5914,34	16,80
GBP-IDR	16527,89	**USD-JPY**	111,92	**Nikkei 225**	19063,22	-154,26
JPY-IDR	119,94	**AUD-USD**	0,7641	**STI**	3173,24	-11,33
AUD-IDR	10197,72	**NZD-USD**	0,6996	**KLCI**	1749,25	-1,16
CAD-IDR	9981,60	**USD-CAD**	1,3341	**JCI**	5592,95	0,44
SGD-IDR	9547,67	**USD-CHF**	1,0012	**Baltic Dry**	1324,00	-14,00
MYR-IDR	3012,67	**USD-NOK**	8,5626			

JIBOR (Rupiah)		Obligasi Pemerintah (Govt Bonds)	
Tenor	**Suku Bunga (%)**	**Tenor**	**Imbal Hasil (%)**
O/N	4,37	1Y	6,35
1 Minggu	4,87	2Y	6,62
1 Bulan	5,87	5Y	6,85
3 Bulan	6,87	10Y	7,04
6 Bulan	7,14	15Y	7,43
12 Bulan	7,32	20Y	7,69

For reference only. Source: Bloomberg, OCBC Bank

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Key Economic Indicators

Date	Time		Event		Survey	Actual	Prior	Revised
03/30/2017	07:50	JN	Japan Buying Foreign Bonds	Mar-24	--	-¥151.6b	¥149.4b	¥150.9b
03/30/2017	07:50	JN	Foreign Buying Japan Bonds	Mar-24	--	-¥1923.7b	-¥586.8b	-¥596.3b
03/30/2017	08:00	AU	HIA New Home Sales MoM	Feb	--	0.20%	-2.20%	--
03/30/2017	10:00	SK	Department Store Sales YoY	Feb	--	-1.30%	4.60%	--
03/30/2017	10:03	MU	Hotel Occupancy Rate	Feb	--	84.9	81.6	--
03/30/2017	**16:30**	**HK**	**Retail Sales Value YoY**	**Feb**	**-0.60%**	**-5.70%**	**-0.90%**	**-1.00%**
03/30/2017	16:30	HK	Retail Sales Volume YoY	Feb	-1.10%	-6.10%	-1.40%	--
03/30/2017	17:00	EC	Economic Confidence	Mar	108.3	107.9	108	--
03/30/2017	**17:00**	**EC**	**Consumer Confidence**	**Mar F**	**-5**	**-5**	**-5**	**--**
03/30/2017	**20:00**	**GE**	**CPI YoY**	**Mar P**	**1.80%**	**1.60%**	**2.20%**	**--**
03/30/2017	**20:00**	**GE**	**CPI EU Harmonized YoY**	**Mar P**	**1.90%**	**1.50%**	**2.20%**	**--**
03/30/2017	**20:30**	**US**	**GDP Annualized QoQ**	**4Q T**	**2.00%**	**2.10%**	**1.90%**	**--**
03/30/2017	20:30	US	Personal Consumption	4Q T	3.00%	3.50%	3.00%	--
03/30/2017	**20:30**	**US**	**GDP Price Index**	**4Q T**	**2.00%**	**2.10%**	**2.00%**	**--**
03/30/2017	20:30	CA	Industrial Product Price MoM	Feb	0.40%	0.10%	0.40%	0.60%
03/30/2017	20:30	US	Core PCE QoQ	4Q T	1.20%	1.30%	1.20%	--
03/30/2017	20:30	CA	Raw Materials Price Index MoM	Feb	0.90%	1.20%	1.70%	--
03/30/2017	**20:30**	**US**	**Initial Jobless Claims**	**Mar-25**	**247k**	**258k**	**261k**	**--**
03/30/2017	20:30	US	Continuing Claims	Mar-18	2031k	2052k	1990k	1987k
03/30/2017	21:45	US	Bloomberg Consumer Comfort	Mar-26	--	49.7	51.3	--
03/31/2017	**05:45**	**NZ**	**Building Permits MoM**	**Feb**	**--**	**14.00%**	**0.80%**	**2.10%**
03/31/2017	**07:00**	**SK**	**Industrial Production YoY**	**Feb**	**7.20%**	**6.60%**	**1.70%**	**1.40%**
03/31/2017	07:01	UK	GfK Consumer Confidence	Mar	-7	-6	-6	--
03/31/2017	**07:30**	**JN**	**Jobless Rate**	**Feb**	**3.00%**	**2.80%**	**3.00%**	**--**
03/31/2017	**07:30**	**JN**	**Job-To-Applicant Ratio**	**Feb**	**1.44**	**1.43**	**1.43**	**--**
03/31/2017	07:30	JN	Overall Household Spending YoY	Feb	-1.70%	-3.80%	-1.20%	--
03/31/2017	**07:30**	**JN**	**Natl CPI YoY**	**Feb**	**0.20%**	**0.30%**	**0.40%**	**--**
03/31/2017	**07:30**	**JN**	**Natl CPI Ex Fresh Food YoY**	**Feb**	**0.20%**	**0.20%**	**0.10%**	**--**
03/31/2017	07:30	JN	Tokyo CPI YoY	Mar	-0.20%	-0.40%	-0.30%	--
03/31/2017	**07:30**	**JN**	**Tokyo CPI Ex-Fresh Food YoY**	**Mar**	**-0.20%**	**-0.40%**	**-0.30%**	**--**
03/31/2017	**07:50**	**JN**	**Industrial Production YoY**	**Feb P**	**3.90%**	**4.80%**	**3.70%**	**--**
03/31/2017	**08:00**	**NZ**	**ANZ Business Confidence**	**Mar**	**--**	**--**	**16.6**	**--**
03/31/2017	08:30	AU	Private Sector Credit YoY	Feb	5.30%	--	5.40%	--
03/31/2017	**09:00**	**CH**	**Manufacturing PMI**	**Mar**	**51.7**	**--**	**51.6**	**--**
03/31/2017	09:00	CH	Non-manufacturing PMI	Mar	--	--	54.2	--
03/31/2017	10:00	SI	Bank Loans and Advances YoY	Feb	--	--	2.80%	--
03/31/2017	13:00	JN	Housing Starts YoY	Feb	-1.40%	--	12.80%	--
03/31/2017	13:00	JN	Annualized Housing Starts	Feb	0.953m	--	1.001m	--
03/31/2017	13:00	JN	Construction Orders YoY	Feb	--	--	1.10%	--
03/31/2017	14:00	GE	Retail Sales YoY	Feb	0.40%	--	2.30%	--
03/31/2017	**14:00**	**UK**	**Nationwide House Px NSA YoY**	**Mar**	**4.00%**	**--**	**4.50%**	**--**
03/31/2017	**14:45**	**FR**	**CPI EU Harmonized YoY**	**Mar P**	**1.40%**	**--**	**1.40%**	**--**
03/31/2017	**14:45**	**FR**	**CPI YoY**	**Mar P**	**1.20%**	**--**	**1.20%**	**--**
03/31/2017	14:45	FR	PPI YoY	Feb	--	--	3.30%	--
03/31/2017	**15:30**	**TH**	**Foreign Reserves**	**Mar-24**	**--**	**--**	**$180.4b**	**--**
03/31/2017	15:30	TH	Exports YoY	Feb	--	--	8.50%	--
03/31/2017	15:30	TH	Imports YoY	Feb	--	--	11.30%	--
03/31/2017	15:30	TH	Trade Balance	Feb	--	--	$1891m	--
03/31/2017	**15:30**	**TH**	**BoP Current Account Balance**	**Feb**	**$4605m**	**--**	**$5008m**	**--**
03/31/2017	**15:55**	**GE**	**Unemployment Change (000's)**	**Mar**	**-10k**	**--**	**-14k**	**-15k**
03/31/2017	15:55	GE	Unemployment Claims Rate SA	Mar	5.90%	--	5.90%	--
03/31/2017	16:30	UK	Current Account Balance	4Q	-16.0b	--	-25.5b	--
03/31/2017	**16:30**	**UK**	**GDP YoY**	**4Q F**	**2.00%**	**--**	**2.00%**	**--**
03/31/2017	16:30	UK	Total Business Investment QoQ	4Q F	-1.00%	--	-1.00%	--
03/31/2017	17:00	IT	CPI NIC incl. tobacco YoY	Mar P	1.50%	--	1.50%	1.60%
03/31/2017	**17:00**	**IT**	**CPI EU Harmonized YoY**	**Mar P**	**1.60%**	**--**	**1.60%**	**--**
03/31/2017	**17:00**	**EC**	**CPI Estimate YoY**	**Mar**	**1.80%**	**--**	**2.00%**	**--**
03/31/2017	17:00	EC	CPI Core YoY	Mar A	0.80%	--	0.90%	--
03/31/2017	18:00	IT	PPI YoY	Feb	--	--	2.80%	--
03/31/2017	**20:30**	**US**	**Personal Income**	**Feb**	**0.40%**	**--**	**0.40%**	**--**
03/31/2017	20:30	CA	GDP YoY	Jan	1.90%	--	2.00%	--
03/31/2017	**20:30**	**US**	**Personal Spending**	**Feb**	**0.20%**	**--**	**0.20%**	**--**
03/31/2017	20:30	US	PCE Deflator YoY	Feb	2.10%	--	1.90%	--
03/31/2017	20:30	US	PCE Core YoY	Feb	1.70%	--	1.70%	--
03/31/2017	**21:45**	**US**	**Chicago Purchasing Manager**	**Mar**	**56.9**	**--**	**57.4**	**--**
03/31/2017	**22:00**	**US**	**U. of Mich. Sentiment**	**Mar F**	**97.6**	**--**	**97.6**	**--**
03/31/2017		PH	Bank Lending YoY	Feb	--	--	16.20%	--

Source: Bloomberg