Ringkasan Harian Pasar Finansial

OCBC Bank

Tuesday, May 31, 2016

Ringkasan Utama

- **Snapshot Global:** Pelaku pasar terasa sedang dalam tahap wait-and-see, karena absennya data major dari ekonomi utama dunia, dengan adanya liburan Memorial Day di AS dan Spring Bank Holiday di Inggris. Pasar juga sedang menunggu beberapa data penting besok, termasuk PMI manufacturing dari China, di mana pasar masih terasa was-wasan terhadap arah pertumbuhan ekonomi negara tersebut.

- **Indonesia:** Gubernur Bank Indonesia, Agus Martowardojo, menyatakan bahwa kelemahan Rupiah belakangan ini dikarenakan oleh faktor musiman, yakni permintaan valas yang agak tinggi dari perusahaan pada kuartal ke-2. Gubernur BI menyatakan bahwa Rupiah akan menguat pada kuartal ke-3 nanti, dengan menurunnya permintaan valas.

Analisa Sekilas

- **FX:** Kebanyakan mata uang emerging markets mengalami kelemahan bulan Mei, dengan adanya penguatan USD setelah adanya indikasi bahwa Fed sedang mempersiapkan pasar tentang kenaikan suku bunga di bulan-bulan mendatang.

Financial Market Indicators (Indonesia)

Nilai Mata Uang				Bursa Saham dan Komoditas		
USD-IDR	13640	EUR-USD	1,1138	Index	Nilai Indeks/Harga	Nett
EUR-IDR	15186,90	GBP-USD	1,4640	DJIA	17873,22	0,00
GBP-IDR	19907,70	USD-JPY	111,12	Nasdaq	4933,51	0,00
JPY-IDR	122,76	AUD-USD	0,7183	Nikkei 225	17068,02	233,18
AUD-IDR	9792,63	NZD-USD	0,6694	STI	2796,75	-5,76
CAD-IDR	10443,15	USD-CAD	1,3049	KLCI	1629,87	-7,32
SGD-IDR	9876,97	USD-CHF	0,9922	JCI	4836,03	21,30
MYR-IDR	3313,50	USD-NOK	8,3457	Baltic Dry	606,00	0,00

JIBOR (Rupiah)		Obligasi Pemerintah (Govt Bonds)	
Tenor	Suku Bunga (%)	Tenor	Imbal Hasil (%)
O/N	4,90	1Y	7,00
1 Minggu	5,55	2Y	7,23
1 Bulan	6,07	5Y	7,61
3 Bulan	6,77	10Y	7,89
6 Bulan	7,45	15Y	8,07
12 Bulan	7,79	20Y	8,07

For reference only. Source: Bloomberg, OCBC Bank

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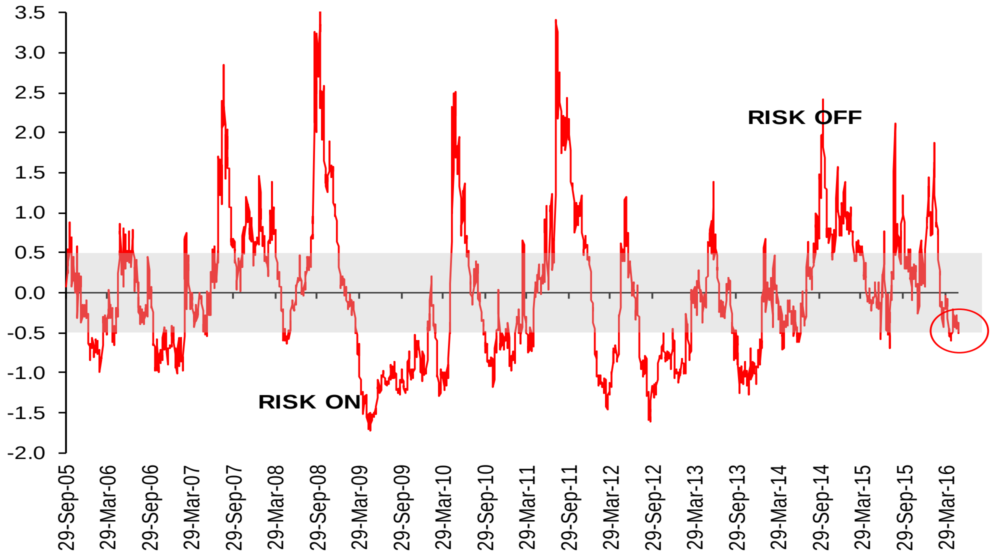
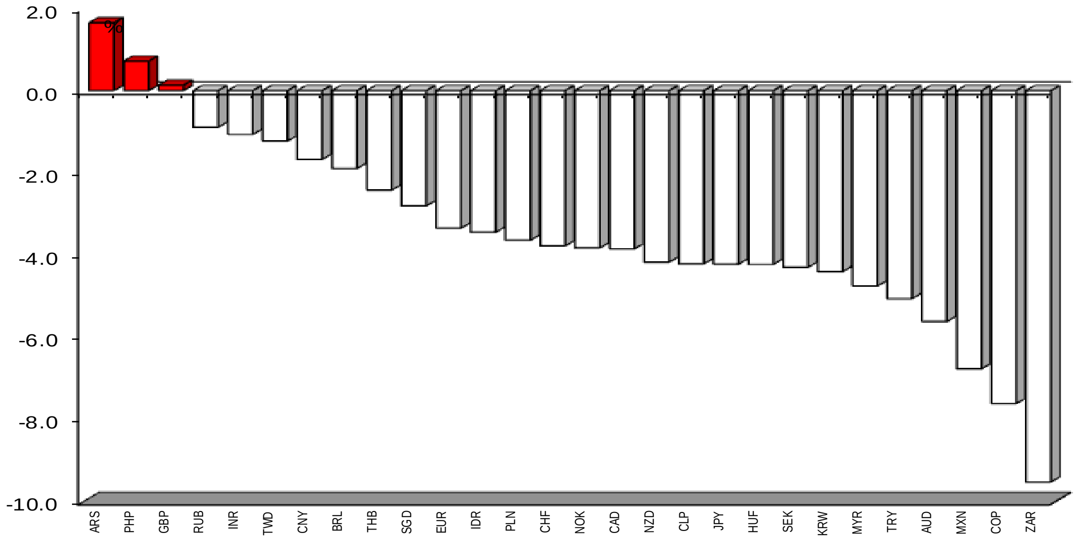
FX Sentiment Index



Source: OCBC Bank

FX performance: 1-month change agst USD



Source: Bloomberg

Key Economic Indicators

Date Time		Event		Survey	Actual	Prior	Revised
05/30/2016 07:50	JN	Retail Trade YoY	Apr	-1.20%	-0.80%	-1.10%	-1.00%
05/30/2016 09:00	AU	HIA New Home Sales MoM	Apr	--	-4.70%	8.90%	--
05/30/2016 10:00	SK	Department Store Sales YoY	Apr	--	4.30%	0.30%	--
05/30/2016 14:45	FR	GDP QoQ	1Q P	0.50%	0.60%	0.50%	--
05/30/2016 14:45	FR	GDP YoY	1Q P	1.30%	1.40%	1.30%	--
05/30/2016 16:00	IT	PPI MoM	Apr	--	-0.90%	0.20%	--
05/30/2016 17:00	EC	Economic Confidence	May	104.4	104.7	103.9	104
05/30/2016 17:00	EC	Consumer Confidence	May F	-7	-7	-7	--
05/30/2016 20:00	GE	CPI MoM	May P	0.30%	0.30%	-0.40%	--
05/30/2016 20:00	GE	CPI YoY	May P	0.10%	0.10%	-0.10%	--
05/30/2016 20:00	GE	CPI EU Harmonized MoM	May P	0.30%	0.40%	-0.50%	--
05/30/2016 20:00	GE	CPI EU Harmonized YoY	May P	-0.10%	0.00%	-0.30%	--
05/30/2016 20:30	CA	Industrial Product Price MoM	Apr	0.40%	-0.50%	-0.60%	--
05/31/2016 06:45	NZ	Building Permits MoM	Apr	--	6.60%	-9.80%	-9.70%
05/31/2016 07:00	SK	Industrial Production SA MoM	Apr	-0.30%	-1.30%	-2.20%	-1.30%
05/31/2016 07:00	SK	Industrial Production YoY	Apr	-1.30%	-2.80%	-1.50%	-0.60%
05/31/2016 07:30	JN	Jobless Rate	Apr	3.20%	3.20%	3.20%	--
05/31/2016 07:30	JN	Job-To-Applicant Ratio	Apr	1.3	1.34	1.3	--
05/31/2016 07:50	JN	Industrial Production MoM	Apr P	-1.50%	0.30%	3.80%	--
05/31/2016 07:50	JN	Industrial Production YoY	Apr P	-5.00%	0.50%	0.20%	--
05/31/2016 09:00	NZ	ANZ Business Confidence	May	--	--	6.2	--
05/31/2016 09:30	AU	BoP Current Account Bal	1Q	-19.5b	--	-21.1b	--
05/31/2016 09:30	AU	Building Approvals MoM	Apr	-3.00%	--	3.70%	--
05/31/2016 09:30	AU	Building Approvals YoY	Apr	-6.70%	--	-6.50%	--
05/31/2016 09:30	AU	Private Sector Credit MoM	Apr	0.50%	--	0.40%	--
05/31/2016 11:00	NZ	Money Supply M3 YoY	Apr	--	--	7.80%	--
05/31/2016 13:00	JN	Housing Starts YoY	Apr	4.10%	--	8.40%	--
05/31/2016 14:00	GE	Retail Sales YoY	Apr	1.70%	--	0.70%	--
05/31/2016 14:45	FR	CPI EU Harmonized YoY	May P	0.00%	--	-0.10%	--
05/31/2016 14:45	FR	CPI YoY	May P	-0.10%	--	-0.20%	--
05/31/2016 15:30	TH	Trade Balance	Apr	--	--	$4687m	--
05/31/2016 15:30	TH	BoP Current Account Bal	Apr	$2350m	--	$4952m	--
05/31/2016 15:55	GE	Unemp Change (000's)	May	-5k	--	-16k	--
05/31/2016 15:55	GE	Unemployment Claims Rate SA	May	6.20%	--	6.20%	--
05/31/2016 16:00	EC	M3 Money Supply YoY	Apr	5.00%	--	5.00%	--
05/31/2016 16:30	HK	Retail Sales Value YoY	Apr	-10.00%	--	-9.80%	--
05/31/2016 17:00	EC	Unemployment Rate	Apr	10.20%	--	10.20%	--
05/31/2016 17:00	EC	CPI Estimate YoY	May	-0.10%	--	-0.20%	--
05/31/2016 17:00	EC	CPI Core YoY	May A	0.80%	--	0.70%	--
05/31/2016 17:00	IT	CPI NIC incl. tobacco MoM	May P	0.20%	--	0.00%	-0.10%
05/31/2016 17:00	IT	CPI NIC incl. tobacco YoY	May P	-0.40%	--	-0.40%	-0.50%
05/31/2016 17:00	IT	CPI EU Harmonized MoM	May P	0.30%	--	0.30%	0.20%
05/31/2016 17:00	IT	CPI EU Harmonized YoY	May P	-0.30%	--	-0.40%	--
05/31/2016 18:00	IT	GDP WDA QoQ	1Q F	0.30%	--	0.30%	--
05/31/2016 18:00	IT	GDP WDA YoY	1Q F	1.00%	--	1.00%	--
05/31/2016 20:30	US	Personal Income	Apr	0.40%	--	0.40%	--
05/31/2016 20:30	CA	GDP MoM	Mar	-0.10%	--	-0.10%	--
05/31/2016 20:30	US	Personal Spending	Apr	0.70%	--	0.10%	--
05/31/2016 20:30	CA	Quarterly GDP Annualized	1Q	2.80%	--	0.80%	--
05/31/2016 20:30	US	PCE Core MoM	Apr	0.20%	--	0.10%	--
05/31/2016 21:45	US	Chicago Purchasing Manager	May	50.5	--	50.4	--
05/31/2016 22:00	US	Consumer Confidence Index	May	96.3	--	94.2	--
05/31/2016 22:30	US	Dallas Fed Manf. Activity	May	-8	--	-13.9	--
05/31/2016	MU	Hotel Occupancy Rate	Apr	--	--	76.5	--

Source: Bloomberg