



Sumber : Yahoo Finance, PT Erdikha Elit Sekuritas

Sectoral	Last	Change %
AGRI	1.387,66	↓ -1,78%
BASIC-IND	953,66	↓ -2,76%
CONSUMER	1.693,62	↓ -0,06%
FINANCE	1.372,51	↓ -2,28%
INFRASTRUC	1.039,61	↑ 0,28%
MANUFACTUR	1.276,01	↓ -1,35%
MINING	1.765,43	↓ -1,11%
MISC-IND	992,78	↓ -1,82%
PROPERTY	363,22	↓ -0,60%
TRADE	836,44	↓ -0,71%

*Data Update Pukul 15.30 WIB

Commodities	Last	Change %
Palm Oil RM	-	↑ 0,11%
Crude Oil \$	59,59	↑ 0,73%
Nickel \$	16.115,00	↑ 0,29%
Gold \$	1.706,70	↓ -0,05%
Coal \$	89,00	↓ -2,73%

*Data Update Terakhir Pukul 07.42 WIB

Indeks	Close	Change %
Dow Jones Industrial	32.982	↓ -0,26%
S&P 500	3.973	↑ 0,36%
Nasdaq Composite	13.247	↑ 1,54%
FTSE 100 London	6.714	↓ -0,86%
DAX Xetra Frankfurt	15.008	↓ 0,00%
Shanghai Composite	3.442	↓ -0,43%
Hangseng Index	28.395	↓ -0,64%
Nikkei 225 Osaka	29.269	↓ -0,56%

*Data Update Terakhir Pukul 07.42 WIB

Corporate Action	Code	Event

Indikator	Tingkat
Pertumbuhan ekonomi (2020 YoY)	-2,07%
Inflasi (Januari 2021, %YoY)	1,38%
BI 7 Day Reverse Repo Rate (Feb 2021)	4%
Defisit anggaran (APBN 2021)	-5,17% PDB
Transaksi berjalan 2020	-0,40% PDB
Cadangan devisa (Feb 2020)	US\$ 138 miliar
Neraca Pembayaran Indonesia 2020	US\$ 2,6 miliar

IHSG	5.985,5	Net F *Sell*	-1110M
Change %	-1,42%	F Buy	3740,M
Net Foreign Buy (YTD)	8,77 T	D Buy	8424,M
Resistance	6.060	F Sell	4851,M
Support	5.855	D Sell	7313,M

Highlight

- Nusantara Infrastructure (META) Klaim Struktur Keuangan Kuat, Siap Garap Proyek Infrastruktur
- JV Mahaka Gandeng The Music Company Perkuat Bisnis Digital Media

IHSG OUTLOOK

Indeks pada perdagangan kemarin ditutup melemah membentuk pola candle three black crows ke level 5985. Ditransaksikan dengan volume yang relatif sepi jika dibandingkan dengan rata-rata volume 5 hari perdagangan. Indeks hari ini ditutup melemah oleh sektor Basic Industry (-2,762%), Finance (-2,281%), Miscellaneous Industry (-1,82%), Agriculture (-1,78%), Manufacture (-1,347%), Mining (-1,107%), Trade (-0,709%), Property (-0,596%), Consumer (-0,057%), kendati ditopang oleh sektor Infrastruktur (0,283%) yang mengalami penguatan walaupun belum signifikan. Indeks pada hari ini diperkirakan akan bergerak konsolidasi pada range pergerakan 5855 - 6060

Global Sentiment

Bursa saham Amerika Serikat (AS) akhirnya kembali ditutup menguat, walaupun untuk indeks Dow Jones masih melemah pada perdagangan kemarin, sehingga hal ini dapat menjadi perhatian pelaku pasar dalam negeri. Penguatan Wall Street tak lain didukung oleh kenaikan saham teknologi yang kembali terjadi pada perdagangan kemarin.

Selain itu, pasar juga patut mencermati peluncuran paket stimulus infrastruktur senilai US\$ 2 triliun lebih, yang berdampak pada kenaikan tarif pajak korporasi AS menjadi 28%. Pelaku pasar juga perlu mencermati pergerakan yield Treasury yang kembali menurun pada perdagangan Rabu waktu AS. Tidak hanya itu, Pelaku pasar juga perlu mencermati data ketenagakerjaan AS, di mana ADP mencatat ada 517.000 penyerapan tenaga kerja baru di sektor swasta, atau menjadi yang terbaik sejak September 2020. Angka tersebut melonjak dari posisi Februari yang berada di angka 176.000 meski sedikit di bawah estimasi Dow Jones sebesar 525.000.

Dari rilis data ekonomi lainnya, hari ini di beberapa negara akan merilis data indeks manajer pembelian (Purchasing Manager Index/PMI) manufaktur versi Markit pada periode Maret 2021. Adapun negara-negara yang akan merilis data PMI manufakturnya antara lain Australia, Korea Selatan, China (versi Caixin/Markit), Zona Euro, Inggris, dan AS.

Sementara di dalam negeri, rilis data ekonomi pada hari ini adalah data PMI manufaktur Markit periode Maret 2021 dan data inflasi periode Maret 2021. (source : CNBC Indonesia)

Stock News

- PT Nusantara Infrastructure Tbk. mengaku siap untuk menjajaki proyek infrastruktur baru mengingat struktur keuangan perseroan yang kuat. Presiden Direktur Nusantara Infrastructure Ramdani Basri mengatakan saat ini perbandingan utang terhadap ekuitas (debt to equity ratio/DER) perseroan tercatat sebesar 0,6 kali atau jauh dari ambang batas 2,3 kali. Emiten dengan kode saham META ini akan mengerjakan proyek tersebut lewat konsorsium Jakarta Metro Expressway bersama PT Acset Indonusa Tbk. (ACST) dan PT Adhi Karya (Persero) Tbk. Di dalamnya, META memegang porsi kepemilikan terbesar. (source : bisnis.com)

- PT Cepat Untung Agar Nikmat, perusahaan patungan (joint venture/JV) antara PT Mahaka Radio Integra Tbk (MARI) dan PT Nusantara Teknologi Terdepan (NTT), menggandeng The Music Company (TMC) untuk memperkuat pengembangan bisnis konser virtual atau e-Concert. Direktur Utama Mahaka Radio Integra Adrian Syarkawi mengatakan, TMC akan membawa musisi lokal dan internasional. Untuk musisi lokal, perseroan akan fokus pada musisi indie. (source : investor.id)

Daily Recommendation

Stock	Last Price	Recommendation	Target Price	Upside (%)	Stop Loss	Commentary
ADRO	1.175	Speculative Buy	1200 - 1230	2,1% - 4,7%	1150	Doji
PTBA	2.620	Speculative Buy	2660 - 2700	1,5% - 3,1%	2580	Doji
INDY	1.425	Speculative Buy	1470 - 1500	3,2% - 5,3%	750	Three Black Crows
ANTM	2.250	Speculative Buy	2300 - 2350	2,2% - 4,4%	2100	Consolidation

Stock Watchlist



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ECONOMIC CALENDAR

Thursday, 01 April 2021

Sources: Trading Economics, Erdikha Research

Monday March 29 2021			Actual	Previous	Consensus	Forecast
3:30 PM	GB	BoE Consumer Credit FEB	£-1.246B	£-2.65B ®	£-1.25B	£-1.6B
3:30 PM	GB	Mortgage Lending FEB	£6.2B	£5.3B ®	£5B	£5.0B
3:30 PM	GB	Mortgage Approvals FEB	87.7K	97.35K ®	95K	94.9K
3:30 PM	GB	Net Lending to Individuals MoM FEB	£4.9B	£2.6B ®		£2.7B
9:30 PM	US	Dallas Fed Manufacturing Index MAR	28.9	17.2		18
10:00 PM	US	Fed Waller Speech				
10:30 PM	US	3-Month Bill Auction	0.020%	0.015%		
10:30 PM	US	6-Month Bill Auction	0.040%	0.040%		
Tuesday March 30 2021			Actual	Previous	Consensus	Forecast
4:00 PM	EA	Economic Sentiment MAR	101	93.4	96	96.3
4:00 PM	EA	Consumer Confidence Final MAR	-10.8	-14.8	-10.8	-10.8
4:00 PM	EA	Consumer Inflation Expectations MAR	18.6	15.7		17
4:00 PM	EA	Industrial Sentiment MAR	2	-3.1 ®	0	-0.6
4:00 PM	EA	Services Sentiment MAR	-9.3	-17 ®	-14.4	-14
7:55 PM	US	Redbook MoM 27/MAR	-17.4%	-17.6%		
7:55 PM	US	Redbook YoY 27/MAR	9.8%	9.4%		
8:00 PM	US	S&P/Case-Shiller Home Price YoY JAN	11.1%	10.2% ®	11%	10.4%
8:00 PM	US	S&P/Case-Shiller Home Price MoM JAN	0.9%	0.9% ®		0.6%
8:00 PM	US	Fed Quarles Speech				
8:00 PM	US	House Price Index YoY JAN	12%	11.4%		11.7%
8:00 PM	US	House Price Index MoM JAN	1%	1.2% ®		1.2%
9:00 PM	US	CB Consumer Confidence MAR	109.7	90.4	96.9	96.5
10:30 PM	US	42-Day Bill Auction	0.015%	0.010%		
11:00 PM	US	Fed Bostic Speech				
Wednesday March 31 2021			Actual	Previous	Consensus	Forecast
1:00 AM	US	Fed Williams Speech				
3:30 AM	US	API Crude Oil Stock Change 26/MAR	3.91M	2.927M	0.400M	
	CN	NBS Manufacturing PMI MAR	51.9	50.6	51	51.1
8:00 AM	CN	Non Manufacturing PMI MAR	56.3	51.4		51.9
1:00 PM	GB	Current Account Q4	£-26.3B	£-14.3B ®	£-33B	£-32B
1:00 PM	GB	GDP Growth Rate QoQ Final Q4	1.3%	16.9% ®	1%	1%
1:00 PM	GB	GDP Growth Rate YoY Final Q4	-7.3%	-8.5% ®	-7.8%	-7.8%
1:00 PM	GB	Nationwide Housing Prices YoY MAR	5.7%	6.9%	6.4%	6.2%
1:00 PM	GB	Nationwide Housing Prices MoM MAR	-0.2%	0.7%	0.4%	0.4%
1:00 PM	GB	Business Investment YoY Final Q4	-7.4%	-12.8% ®		-10.3%
1:00 PM	GB	Business Investment QoQ Final Q4	5.9%	13.2% ®		1.3%
4:00 PM	EA	Core Inflation Rate YoY Flash MAR	0.9%	1.1%	1.1%	1.1%
4:00 PM	EA	Inflation Rate YoY Flash MAR	1.3%	0.9%	1.3%	1.2%
4:00 PM	EA	Inflation Rate MoM Flash MAR	0.9%	0.2%		0.8%
6:00 PM	US	MBA Mortgage Applications 26/MAR	-2.2%	-2.5%		
6:00 PM	US	MBA 30-Year Mortgage Rate 26/MAR	3.33%	3.36%		
7:15 PM	US	ADP Employment Change MAR	517K	176K ®	550K	495K
8:45 PM	US	Chicago PMI MAR	66.3	59.5	60.7	59.8
9:00 PM	US	Pending Home Sales YoY FEB	-0.5%	13.5% ®		9.5%
9:00 PM	US	Pending Home Sales MoM FEB	-10.6%	-2.4% ®	-2.6%	-3.1%
9:30 PM	US	EIA Crude Oil Stocks Change 26/MAR	-0.876M	1.912M	0.107M	
9:30 PM	US	EIA Gasoline Stocks Change 26/MAR	-1.735M	0.203M	0.73M	
9:30 PM	US	EIA Cushing Crude Oil Stocks Change 26/MAR	0.782M	-1.935M		
9:30 PM	US	EIA Crude Oil Imports Change 26/MAR	-0.17M	0.338M		
9:30 PM	US	EIA Refinery Crude Runs Change 26/MAR	0.552M	0.956M		
9:30 PM	US	EIA Heating Oil Stocks Change 26/MAR	0.024M	0.011M		
9:30 PM	US	EIA Distillate Stocks Change 26/MAR	2.542M	3.806M	0.171M	
9:30 PM	US	EIA Gasoline Production Change 26/MAR	0.762M	-0.3M		
9:30 PM	US	EIA Distillate Fuel Production Change 26/MAR	0.137M	0.373M		
9:45 PM	US	Fed Bostic Speech				
11:00 PM	US	Quarterly Grain Stocks - Wheat MAR	1.314B	1.674B	1.272B	
11:00 PM	US	Quarterly Grain Stocks - Corn MAR	7.701B	11.322B	7.767B	
11:00 PM	US	Quarterly Grain Stocks - Soy MAR	1.564B	2.933B	1.534B	
11:00 PM	US	Prospective Plantings - Soy 2021	87.6M	83.51M	89.996M	
11:00 PM	US	Prospective Plantings - Corn 2021	91.144M	96.99M	93.208M	
11:00 PM	US	Prospective Plantings - Wheat 2021	46.358M	44.655M	44.971M	
11:00 PM	US	Prospective Plantings - Cotton 2021	12.036M	13.703M	11.905M	
11:00 PM	US	USDA Prospective Plantings Report				
	US	President Biden Speech on Recovery Package				
Thursday April 01 2021			Actual	Previous	Consensus	Forecast
7:30 AM	ID	Markit Manufacturing PMI MAR		50.9		52
	CN	Caixin Manufacturing PMI MAR		50.9	51.3	51.2
11:00 AM	ID	Inflation Rate YoY MAR		1.38%	1.4%	1.4%
11:00 AM	ID	Inflation Rate MoM MAR		0.1%	0.14%	0.1%
11:00 AM	ID	Tourist Arrivals YoY FEB		-89.05%		-90%
11:00 AM	ID	Core Inflation Rate YoY MAR		1.53%	1.44%	1.5%
3:00 PM	EA	Markit Manufacturing PMI Final MAR		57.9	62.4	62.4
3:30 PM	GB	Markit/CIPS Manufacturing PMI Final MAR		55.1	57.9	57.9
6:30 PM	US	Challenger Job Cuts MAR		34.531K		30K

7:30 PM	US	<u>Jobless Claims 4-week Average MAR/27</u>	736K		710K
7:30 PM	US	<u>Initial Jobless Claims 27/MAR</u>	684K	680K	650K
7:30 PM	US	<u>Continuing Jobless Claims 20/MAR</u>	3870K	3775K	3680K
8:45 PM	US	<u>Markit Manufacturing PMI Final MAR</u>	58.6	59	59
9:00 PM	US	<u>Construction Spending MoM FEB</u>	1.7%	-1%	-0.6%
9:00 PM	US	<u>ISM Manufacturing PMI MAR</u>	60.8	61.3	61.2
9:00 PM	US	<u>ISM Manufacturing New Orders MAR</u>	64.8		64
9:00 PM	US	<u>ISM Manufacturing Prices MAR</u>	86	85	84
9:00 PM	US	<u>ISM Manufacturing Employment MAR</u>	54.4		56
9:30 PM	US	<u>EIA Natural Gas Stocks Change 26/MAR</u>	-36Bcf	21Bcf	
10:30 PM	US	8-Week Bill Auction	0.020%		
10:30 PM	US	4-Week Bill Auction	0.015%		
Friday April 02 2021			Actual	Previous	Consensus Forecast
12:00 AM	US	<u>Fed Harker Speech</u>			
12:00 AM	US	<u>Baker Hughes Total Rig Count 01/APR</u>	417		
12:00 AM	US	<u>Baker Hughes Oil Rig Count 01/APR</u>	324		
5:05 AM	US	<u>Fed Kaplan Speech</u>			
7:00 AM	US	<u>Total Vehicle Sales MAR</u>	15.7M		16M
	US	<u>Non Farm Payrolls MAR</u>	379K	647K	680K
7:30 PM	US	<u>Unemployment Rate MAR</u>	6.2%	6%	6%
7:30 PM	US	<u>Manufacturing Payrolls MAR</u>	21K	33K	35K
7:30 PM	US	<u>Participation Rate MAR</u>	61.4%		61.7%
7:30 PM	US	<u>Average Hourly Earnings YoY MAR</u>	5.3%	4.5%	4.7%
7:30 PM	US	<u>Average Weekly Hours MAR</u>	34.6	34.7	34.8
7:30 PM	US	<u>Government Payrolls MAR</u>	-86K		225K
7:30 PM	US	<u>Nonfarm Payrolls Private MAR</u>	465K	575K	455K
7:30 PM	US	<u>Average Hourly Earnings MoM MAR</u>	0.2%	0.1%	0.2%
8:45 PM	US	<u>ISM New York Index MAR</u>	35.5		47
10:00 PM	US	<u>Fed Bostic Speech</u>			
7:00 AM	US	<u>Total Vehicle Sales MAR</u>	15.7M		16M
	US	<u>Non Farm Payrolls MAR</u>	379K	639K	680K
7:30 PM	US	<u>Unemployment Rate MAR</u>	6.20%	6%	6%
7:30 PM	US	<u>Manufacturing Payrolls MAR</u>	21K	33K	35K
7:30 PM	US	<u>Participation Rate MAR</u>	61.40%		61.70%
7:30 PM	US	<u>Average Weekly Hours MAR</u>	34.6	34.7	34.8
7:30 PM	US	<u>Government Payrolls MAR</u>	-86K		225K
7:30 PM	US	<u>Nonfarm Payrolls Private MAR</u>	465K	580K	455K
7:30 PM	US	<u>Average Hourly Earnings YoY MAR</u>	5.30%	4.50%	4.70%
7:30 PM	US	<u>Average Hourly Earnings MoM MAR</u>	0.20%	0.20%	0.20%
8:45 PM	US	<u>ISM New York Index MAR</u>	35.5		47
10:00 PM	US	<u>Fed Bostic Speech</u>			

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