

IHSG	6,150.3
Change %	0.09%
Net Foreign Buy (YTD)	19.01 T
Resistance	6180
Support	6110
Net F *Buy*	545.4M
F Buy	4127.M
D Buy	8707.M
F Sell	3582.M
D Sell	9252.M



Sumber : Tradingview, PT Erdikha Elit Sekuritas

Sectoral	Last		Change %
Basic Materials	1,175.54	⬆️	1.01%
Consumer Cyclicals	806.54	⬆️	0.50%
Energy	752.72	⬇️	-0.02%
Financials	1,397.67	⬇️	-0.13%
Healthcare	1,339.70	⬇️	-0.51%
Industrials	994.98	⬇️	-0.26%
Infrastructures	936.76	⬆️	0.41%
Consumer Non-Cyclical	661.87	⬇️	-0.63%
Properties & Real Estate	805.91	⬇️	-0.45%
Technology	10,990.88	⬆️	1.67%
Transportation & Logistic	1,061.94	⬇️	-1.09%
*Data Update Pukul 15.30 WIB			

Commodities		Last		Change %
Palm Oil	RM	4,254.00	➡️	0.00%
Crude Oil	\$	68.57	⬆️	0.10%
Nickel	\$	19,550.00	⬇️	-0.20%
Gold	\$	1,813.30	⬇️	-0.01%
Coal	\$	172.00	⬆️	0.38%
*Data Update Terakhir Pukul 07.42 WIB				

Indeks	Close		Change %
Dow Jones Industrial	35,361	⬇️	-0.11%
S&P 500	4,523	⬇️	-0.14%
Nasdaq Composite	15,259	⬇️	-0.04%
FTSE 100 London	7,120	⬇️	-0.40%
DAX Xetra Frankfurt	15,835	⬇️	-0.33%
Shanghai Composite	3,544	⬆️	0.45%
Hangseng Index	25,879	⬆️	1.33%
Nikkei 225 Osaka	28,090	⬆️	1.08%
*Data Update Terakhir Pukul 07.42 WIB			

Indikator	Tingkat
Pertumbuhan ekonomi (Q-2021)	7.07%
Inflasi (Juli 2021)	1.52%
BI 7 Day Reverse Repo Rate (Juli 2021)	4%
Defisit anggaran (APBN 2021)	-5.17% PDB
Transaksi berjalan 2020	-0,40% PDB
Cadangan devisa (Juli 2020)	US\$ 137.3 miliar
Neraca Pembayaran Indonesia 2020	US\$ 4.1 miliar

IHSG OUTLOOK
Indeks pada perdagangan kemarin ditutup menguat pada level 6150. Ditransaksikan dengan volume yang cukup ramai jika dibandingkan dengan rata-rata volume 5 hari perdagangan. Indeks ditopang oleh sektor Technology (1.672%), Basic Materials (1.011%), Consumer Cyclicals (0.502%), Infrastructures (0.412%), kendati dibebani oleh sektor Energy (-0.021%), Financials (-0.129%), Industrials (-0.255%), Properties & Real Estate (-0.447%), Healthcare (-0.509%), Consumer Non-Cyclical (-0.633%), Transportation & Logistic (-1.089%) yang mengalami pelemahan walaupun belum signifikan. Indeks pada hari ini diperkirakan akan bergerak pada range level support 6110 dan level resistance 6180.

Global Sentiment
Indeks pada perdagangan kemarin ditutup menguat pada level 6150. Penguatan diakhir sesi 2 yang terjadi pada hari Selasa salah satu faktornya yakni karena para pelaku pasar menunggu hasil dari rilisnya data indikator ekonomi domestik meliputi data manufacturing PMI yang diproyeksikan akan masih berada dilevel kontraksi atau dibawah acuan manufacturing PMI 50 yakni 41, cenderung lebih baik dibandingkan dengan pada bulan Juli yang berada dilevel 40,1 akibat dari adanya PPKM mikro darurat yang berlaku pada periode tersebut. Proyeksi yang cenderung membaik tersebut disesuaikan dengan kondisi saat ini yang mana kurva statistik tingkat kasus harian juga cenderung melandai, sehingga membuat kebijakan PPKM juga lebih longgar dibandingkan dengan periode Juli 2021. Dengan adanya pelonggaran tersebut tentu dampak yang ditimbulkan juga cenderung lebih berkurang. Oleh karenanya proyeksi untuk data manufaktur bulan Agustus juga cenderung membaik meskipun masih dibawah level ekspansi.
Kemudian selain data manufacturing PMI akan rilis juga data terkait tingkat inflasi bulan Agustus secara tahunan (YoY) yang diproyeksikan tumbuh 1,6% dari sebelumnya 1,52%, meningkat namun cenderung melambat atau tidak signifikan dan secara bulanan (MoM) yang diproyeksikan tumbuh 0,03% dari sebelumnya 0,08% cenderung melambat dan lebih turun dari sebelumnya. Jika kita kaitkan dengan kondisi yang ada pada bulan Agustus ini, tingkat inflasi yang tidak jauh berbeda dengan Juli cenderung wajar, karena lagi-lagi pada periode ini masih ada kebijakan PPKM yang diberlakukan oleh pemerintah, kemudian aktivitas ekonomi masih cenderung terbatas, meskipun pelonggaran untuk beberapa sektor usaha sudah diberlakukan namun masih belum ada dampak yang signifikan terhadap konsumsi masyarakatnya pada bulan Agustus ini, sehingga didapatkan proyeksi tersebut.
Namun, karena kondisi pada bulan Agustus ini yang kian membaik, sehingga para pelaku pasar terlihat cukup optimis dengan result dari indikator ekonomi terkait data manufaktur dan tingkat inflasi di bulan Agustus yang akan rilis pada hari Rabu pagi, sehingga responnya diakhir sesi 2 yang sebelumnya dipertengahan sesi sempat melemah namun kembali menguat pada akhir penutupan sesi 2 karena optimisme tersebut.
Lalu, selain dari domestik ada beberapa indikator ekonomi eksternal yang perlu diperhatikan para pelaku pasar juga pada hari Rabu (1/9/2021) yakni rilisny data cadangan minyak mentah US secara mingguan yang diproyeksikan berdasarkan survei API cenderung menurun, kemudian rilisny dtaa manufaktur US pada bulan Agustus yang diproyeksikan akan cenderung melambat menjadi 61,2 dari sebelumnya 63,4. Selain US, dari Jerman dan juga China juga sama akan rilis juga data terkiat manufacturing PMI Final nya pada bulan Agustus yang diproyeksikan ekspansi cenderung melambat juga yakni untuk Jerman 62,7 dari sebelumnya 65,9 dan Caixi Manufacturing China 50,2 dari sebelumnya 50,3.

Daily Recommendation						
Stock	Last Price	Recommendation	Target Price	Upside (%)	Stop Loss	Commentary
SAME	575	Speculative Buy	590 - 625	2.6% - 8.7%	540	Huge volume accumulation
MPPA	990	Speculative Buy	1020 - 1055	3% - 6.6%	905	Huge volume accumulation
ERAA	605	Speculative Buy	625 - 640	3.3% - 5.8%	580	Consolidation
EMTK	2,170	Speculative Buy	2250 - 2340	3.7% - 7.8%	2020	Huge volume accumulation
BBNI	5,400	Trading Buy	5500 - 5650	1.9% - 4.6%	5300	Doji
			-			
			-			
			-			
			-			
			-			

Stock Watchlist

ECONOMIC CALENDAR

Sources: Trading Economics, Erdikha Research

Monday August 30 2021			Actual	Previous	Consensus	Forecast
4:00 PM	EA	<u>Consumer Confidence Final AUG</u>	-5.3	-4.4	-5.3	-5.3
4:00 PM	EA	<u>Economic Sentiment AUG</u>	117.5	119	117.9	118.1
4:00 PM	EA	<u>Industrial Sentiment AUG</u>	13.7	14.5 ®	13.4	13.6
4:00 PM	EA	<u>Services Sentiment AUG</u>	16.8	18.9 ®	18.8	18.8
4:00 PM	EA	<u>Consumer Inflation Expectations AUG</u>	31.1	30		28
9:00 PM	US	<u>Pending Home Sales YoY JUL</u>	-8.50%	-2% ®		-2%
9:00 PM	US	<u>Pending Home Sales MoM JUL</u>	-1.80%	-2% ®	0.40%	1%
9:30 PM	US	<u>Dallas Fed Manufacturing Index AUG</u>	9	27.3		25
9:30 PM	US	NY Fed Treasury Purchases 7.5 to 30 yrs			\$1.225B	
10:30 PM	US	<u>3-Month Bill Auction</u>	0.05%	0.06%		
10:30 PM	US	<u>6-Month Bill Auction</u>	0.06%	0.05%		
Tuesday August 31 2021			Actual	Previous	Consensus	Forecast
	CN	<u>NBS Manufacturing PMI AUG</u>	50.1	50.4	50.2	50.3
8:00 AM	CN	<u>Non Manufacturing PMI AUG</u>	47.5	53.3		53
3:30 PM	GB	<u>BoE Consumer Credit JUL</u>	£-0.042B	£0.308B ®	£0.441B	£0.5B
3:30 PM	GB	<u>Mortgage Lending JUL</u>	£-1.4B	£17.868B ®	£3.1B	£3B
3:30 PM	GB	<u>Mortgage Approvals JUL</u>	75.2K	81.338K ®	78.6K	79.1K
3:30 PM	GB	<u>Net Lending to Individuals MoM JUL</u>	£-1.4B	£-18B ®		£3.2B
4:00 PM	EA	<u>Core Inflation Rate YoY Flash AUG</u>		0.70%	1.50%	1.40%
4:00 PM	EA	<u>Inflation Rate YoY Flash AUG</u>		2.20%	2.70%	2.70%
4:00 PM	EA	<u>Inflation Rate MoM Flash AUG</u>		-0.10%		0.10%
7:55 PM	US	<u>Redbook YoY 28/AUG</u>		16.60%		
8:00 PM	US	<u>S&P/Case-Shiller Home Price MoM JUN</u>		2.10%		1.90%
8:00 PM	US	<u>S&P/Case-Shiller Home Price YoY JUN</u>		17%	18.50%	18%
8:00 PM	US	<u>House Price Index MoM JUN</u>		1.70%		1.60%
8:00 PM	US	<u>House Price Index YoY JUN</u>		18%		19%
8:45 PM	US	<u>Chicago PMI AUG</u>		73.4	68	69
9:00 PM	US	<u>CB Consumer Confidence AUG</u>		129.1	124	123
9:30 PM	US	NY Fed Treasury Purchases 10 to 22.5 yrs			\$1.425B	
10:30 PM	US	21-Day Bill Auction				
Wednesday September 01 2021			Actual	Previous	Consensus	Forecast
3:30 AM	US	<u>API Crude Oil Stock Change 27/AUG</u>		-1.622M	-2.833M	
7:30 AM	ID	<u>Markit Manufacturing PMI AUG</u>		40.1		41
	CN	<u>Caixin Manufacturing PMI AUG</u>		50.3	50.2	50.2
11:00 AM	ID	<u>Inflation Rate YoY AUG</u>		1.52%	1.60%	1.60%
11:00 AM	ID	<u>Inflation Rate MoM AUG</u>		0.08%	0.03%	0.10%
11:00 AM	ID	<u>Tourist Arrivals YoY JUL</u>		-10.04%		-5%
11:00 AM	ID	<u>Core Inflation Rate YoY AUG</u>		1.40%	1.30%	1.30%
1:00 PM	GB	<u>Nationwide Housing Prices YoY AUG</u>		10.50%	8.60%	8.90%
1:00 PM	GB	<u>Nationwide Housing Prices MoM AUG</u>		-0.50%	0.20%	0.30%
3:00 PM	EA	<u>Markit Manufacturing PMI Final AUG</u>		62.8	61.5	61.5
3:30 PM	GB	<u>Markit/CIPS Manufacturing PMI Final AUG</u>		60.4	60.1	60.1
4:00 PM	EA	<u>Unemployment Rate JUL</u>		7.70%	7.60%	7.60%
6:00 PM	US	<u>MBA 30-Year Mortgage Rate 27/AUG</u>		3.03%		
6:00 PM	US	<u>MBA Mortgage Applications 27/AUG</u>		1.60%		
7:15 PM	US	<u>ADP Employment Change AUG</u>		330K	625K	500K
8:45 PM	US	<u>Markit Manufacturing PMI Final AUG</u>		63.4	61.2	61.2
9:00 PM	US	<u>Construction Spending MoM JUL</u>		0.10%	0.20%	0.30%
9:00 PM	US	<u>ISM Manufacturing PMI AUG</u>		59.5	58.7	59
9:00 PM	US	<u>ISM Manufacturing Employment AUG</u>		52.9		52.3
9:00 PM	US	<u>ISM Manufacturing New Orders AUG</u>		64.9		64
9:00 PM	US	<u>ISM Manufacturing Prices AUG</u>		85.7	83.8	85
9:30 PM	US	<u>EIA Gasoline Stocks Change 27/AUG</u>		-2.242M	-1.7M	
9:30 PM	US	<u>EIA Crude Oil Stocks Change 27/AUG</u>		-2.979M	-2.833M	

9:30 PM	US	<u>EIA Crude Oil Imports Change 27/AUG</u>		0.426M		
9:30 PM	US	<u>EIA Cushing Crude Oil Stocks Change 27/AUG</u>		0.07M		
9:30 PM	US	<u>EIA Distillate Fuel Production Change 27/AUG</u>		0.14M		
9:30 PM	US	<u>EIA Distillate Stocks Change 27/AUG</u>		0.645M	-0.6M	
9:30 PM	US	<u>EIA Heating Oil Stocks Change 27/AUG</u>		-0.299M		
9:30 PM	US	<u>EIA Gasoline Production Change 27/AUG</u>		0.249M		
9:30 PM	US	<u>EIA Refinery Crude Runs Change 27/AUG</u>		0.066M		
10:20 PM	US	NY Fed Treasury Purchases 7 to 10 yrs			\$3.225B	
Thursday September 02 2021			Actual	Previous	Consensus	Forecast
7:00 AM	US	<u>Total Vehicle Sales AUG</u>		14.8M		
4:00 PM	EA	<u>PPI MoM JUL</u>		1.40%	1.10%	1.40%
4:00 PM	EA	<u>PPI YoY JUL</u>		10.20%	11%	11%
6:30 PM	US	<u>Challenger Job Cuts AUG</u>		18.942K		19K
	US	<u>Balance of Trade JUL</u>		-\$75.7B	\$-71B	\$-70B
7:30 PM	US	<u>Unit Labour Costs QoQ Final Q2</u>		-2.80%	1%	1%
7:30 PM	US	<u>Nonfarm Productivity QoQ Final Q2</u>		4.30%	2.40%	2.30%
7:30 PM	US	<u>Initial Jobless Claims 28/AUG</u>		353K	345K	340K
7:30 PM	US	<u>Jobless Claims 4-week Average AUG/28</u>		366.5K		354.75K
7:30 PM	US	<u>Continuing Jobless Claims 21/AUG</u>		2862K	2775K	2815K
7:30 PM	US	<u>Exports JUL</u>		\$207.7B		\$210.3B
7:30 PM	US	<u>Imports JUL</u>		\$283.4B		\$280.3B
9:00 PM	US	<u>Factory Orders MoM JUL</u>		1.50%	0.40%	0.20%
9:00 PM	US	<u>Factory Orders ex Transportation JUL</u>		1.40%		0.50%
9:30 PM	US	NY Fed Treasury Purchases 22.5 to 30 yrs			\$2.025B	
9:30 PM	US	<u>EIA Natural Gas Stocks Change 27/AUG</u>		29Bcf		
10:30 PM	US	8-Week Bill Auction		0.06%		
10:30 PM	US	<u>4-Week Bill Auction</u>		0.04%		
	US	<u>LMI Logistics Managers Index Current</u>		74.5		
Friday September 03 2021			Actual	Previous	Consensus	Forecast
8:45 AM	CN	<u>Caixin Services PMI AUG</u>		54.9		54
8:45 AM	CN	<u>Caixin Composite PMI AUG</u>		53.1		52.9
3:00 PM	EA	<u>Markit Services PMI Final AUG</u>		59.8	59.7	59.7
3:00 PM	EA	<u>Markit Composite PMI Final AUG</u>		60.2	59.5	59.5
3:30 PM	GB	<u>Markit/CIPS UK Services PMI Final AUG</u>		59.6	55.5	55.5
3:30 PM	GB	<u>Markit/CIPS Composite PMI Final AUG</u>		59.2	55.3	55.3
4:00 PM	EA	<u>Retail Sales MoM JUL</u>		1.50%	0.10%	0.20%
4:00 PM	EA	<u>Retail Sales YoY JUL</u>		5%	4.80%	5.50%
	US	<u>Non Farm Payrolls AUG</u>		943K	750K	750K
7:30 PM	US	<u>Unemployment Rate AUG</u>		5.40%	5.20%	5.30%
7:30 PM	US	<u>Nonfarm Payrolls Private AUG</u>		703K	700K	690K
7:30 PM	US	<u>Average Hourly Earnings MoM AUG</u>		0.40%	0.30%	0.40%
7:30 PM	US	<u>Average Weekly Hours AUG</u>		34.8	34.8	34.8
7:30 PM	US	<u>Average Hourly Earnings YoY AUG</u>		4%	4%	4%
7:30 PM	US	<u>Participation Rate AUG</u>		61.70%		61.70%
7:30 PM	US	<u>Government Payrolls AUG</u>		240K		60K
7:30 PM	US	<u>Manufacturing Payrolls AUG</u>		27K	28K	25K
8:45 PM	US	<u>Markit Services PMI Final AUG</u>		59.9	55.2	55.2
8:45 PM	US	<u>Markit Composite PMI Final AUG</u>		59.9	55.4	55.4
9:00 PM	US	<u>ISM Non-Manufacturing PMI AUG</u>		64.1	61.8	61.5
9:00 PM	US	<u>ISM Non-Manufacturing Employment AUG</u>		53.8		
9:00 PM	US	<u>ISM Non-Manufacturing Business Activity AUG</u>		67	62.8	
9:00 PM	US	<u>ISM Non-Manufacturing Prices AUG</u>		82.3		
9:00 PM	US	<u>ISM Non-Manufacturing New Orders AUG</u>		63.7		

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