

IHSG	6,126.9
Change %	0.80%
Net Foreign Buy (YTD)	19.42 T
Resistance	6150
Support	6080
Net F *Buy*	207.7M
F Buy	2009.M
D Buy	8061.M
F Sell	1801.M
D Sell	8269.M



Sumber : Tradingview, PT Erdikha Elit Sekuritas

Sectoral	Last		Change %
Basic Materials	1,157.57	⬆️	0.05%
Consumer Cyclicals	791.56	⬆️	0.16%
Energy	772.50	⬆️	1.91%
Financials	1,394.08	⬆️	1.05%
Healthcare	1,358.39	⬆️	1.17%
Industrials	1,018.21	⬆️	2.11%
Infrastructures	932.01	⬆️	0.72%
Consumer Non-Cyclical	669.31	⬆️	0.86%
Properties & Real Estate	794.73	⬆️	0.05%
Technology	10,312.46	⬇️	-0.59%
Transportation & Logistic	1,084.17	⬇️	-0.62%

*Data Update Pukul 15.30 WIB

Commodities		Last		Change %
Palm Oil	RM	4,310.00	⬆️	1.63%
Crude Oil	\$	69.10	⬇️	-1.27%
Nickel	\$	19,365.00	⬇️	-0.76%
Gold	\$	1,826.10	⬆️	0.95%
Coal	\$	179.00	⬆️	0.85%

*Data Update Terakhir Pukul 07.42 WIB

Indeks	Close		Change %
Dow Jones Industrial	35,369	⬇️	-0.21%
S&P 500	4,535	⬇️	-0.03%
Nasdaq Composite	15,364	⬆️	0.21%
FTSE 100 London	7,138	⬇️	-0.36%
DAX Xetra Frankfurt	15,781	⬇️	-0.38%
Shanghai Composite	3,582	⬇️	-0.43%
Hangseng Index	25,902	⬇️	-0.72%
Nikkei 225 Osaka	29,128	⬆️	2.05%

*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 minggu lalu ditutup menguat pada level 6118. Ditransaksikan dengan volume yang cukup ramai jika dibandingkan dengan rata-rata volume 5 hari perdagangan. Indeks ditopang oleh sektor Basic Materials (0.047%), Consumer Cyclicals (0.158%), Energy (1.906%), Financials (1.05%), Healthcare (1.169%), Industrials (2.112%), Infrastructures (0.716%), Consumer Non-Cyclical (0.857%), Properties & Real Estate (0.049%), kendati dibebani oleh sektor Technology (-0.593%), Transportation & Logistic (-0.622%) yang mengalami pelemahan walaupun belum signifikan. Indeks pada hari ini diperkirakan akan bergerak pada range level support 6080 dan level resistance 6150.

Global Sentiment

Sentimen pertama yaitu dari bursa AS yang mana hari ini akan libur memperingati hari buruh, dan di buka kembali pada hari Selasa. Slip gaji per Agustus tercatat bertambah 235.000, atau jauh dari ekspektasi ekonom dalam polling Dow Jones yang memprediksi angka 720.000. Angka itu jauh dari capaian Juli yang mencapai 1,05 juta slip gaji. Pemicunya adalah penyebaran kembali varian delta yang membuat optimisme pelaku usaha kembali tertekan, dan mengurangi aktivitas bisnisnya. Selain itu, Pelaku pasar akan kembali memantau data klaim tunjangan pengangguran mingguan yang akan dirilis Kamis pekan ini, karena akan menjadi acuan bagi bank sentral AS (Federal Reserve/The Fed) untuk mempercepat atau memperlambat kebijakan tapering (pengurangan pembelian obligasi di pasar sekunder) yang telah disebutkan akan dilakukan tahun ini.

Sentimen kedua yaitu pada hari ini beberapa agenda nasinoal terkait ekonomi makro layak menjadi perhatian, di antaranya pengumuman Pemberlakuan Pembatasan Kegiatan Masyarakat (PPKM) yang kemungkinan besar akan diperpanjang. Sebelumnya, pemerintah memutuskan perpanjangan PPKM dari tanggal 31 Agustus hingga 6 September 2021, dengan tambahan wilayah aglomerasi yang masuk ke PPKM level 3, yakni Malang Raya dan Solo Raya. Sementara itu, wilayah Semarang Raya berhasil turun ke level 2. Selanjutnya, Pasar akan mengantisipasi peluang pelonggaran yang diberikan untuk sektor-sektor non-esensial di kota besar Indonesia seperti pusat perbelanjaan, konstruksi, manufaktur, di mana banyak emiten nasional yang bergerak di dalamnya.

Selain itu, pelaku pasar juga harus memantau rapat terbatas (ratas) virtual oleh Presiden Joko Wldodo yang dihadiri anggota kabinetnya. Sejauh ini detil agenda rapat tersebut belum diumumkan.Namun, pemerintah pekan lalu menyatakan bersiap menghadapi gelombang ketiga pandemi, dengan varian Mu atau B.1.621 virus Covid-19. Varian ini diumumkan pada 31 Agustus lalu oleh Organisasi Kesehatan Dunia (World Health Organization/WHO). Kini, virus yang pertama kali ditemukan di Colombia ini telah menyebar ke setidaknya 39 negara.Bagaimana perkembangan ke depannya tentunya akan terus diamati oleh pelaku pasar, sebab penyebaran virus corona Delta saja masih berisiko membuat perekonomian global melambat, apalagi jika corona Mu ikut menyebar luas.

Daily Recommendation

Stock	Last Price	Recommendation	Target Price	Upside (%)	Stop Loss	Commentary
ASII	5,350	Buy	5450 - 5650	1.9% - 5.6%	5150	Huge volume accumulation
SMRA	845	Buy	860 - 875	1.8% - 3.6%	830	Break MA200
ERAA	590	Speculative Buy	615 - 640	4.2% - 8.5%	550	Consolidation
ADRO	1,355	Buy	1390 - 1435	2.6% - 5.9%	1315	Huge volume accumulation
BANK	3,230	Speculative Buy	3380 - 3600	4.6% - 11.5%	3010	Consolidation
			-			
			-			
			-			
			-			
			-			

Stock Watchlist

ECONOMIC CALENDAR



Sources: Trading Economics, Erdikha Research

Monday September 06 2021			Actual	Previous	Consensus	Forecast
7:00 AM	US	Total Vehicle Sales AUG		14.8M		
2:30 PM	EA	Construction PMI AUG		49.8		50.6
3:00 PM	GB	New Car Sales YoY AUG		-29.50%		-16%
3:30 PM	GB	Construction PMI AUG		58.7		55.6
Tuesday September 07 2021			Actual	Previous	Consensus	Forecast
10:00 AM	CN	Balance of Trade AUG		\$56.58B		\$58B
10:00 AM	CN	Exports YoY AUG		19.30%		11%
10:00 AM	CN	Imports YoY AUG		28.10%		19%
10:00 AM	ID	Foreign Exchange Reserves AUG		\$137.3B		
1:00 PM	GB	Halifax House Price Index YoY AUG		7.60%		7.30%
1:00 PM	GB	Halifax House Price Index MoM AUG		0.40%		1%
3:00 PM	CN	Foreign Exchange Reserves AUG		\$3.236T		\$3.2T
4:00 PM	EA	Employment Change QoQ Final Q2		-0.20%	0.50%	0.50%
4:00 PM	EA	Employment Change YoY Final Q2		-1.80%	1.80%	1.80%
4:00 PM	EA	GDP Growth Rate QoQ 3rd Est Q2		-0.30%	2%	2%
4:00 PM	EA	GDP Growth Rate YoY 3rd Est Q2		-1.30%	13.60%	13.60%
4:00 PM	EA	ZEW Economic Sentiment Index SEP		42.7		30
5:00 PM	GB	BBA Mortgage Rate AUG		3.61%		3.61%
9:30 PM	US	NY Fed Treasury Purchases 10 to 22.5 yrs			\$1.425B	
10:30 PM	US	52-Week Bill Auction		0.08%		
10:30 PM	US	3-Month Bill Auction		0.05%		
10:30 PM	US	6-Month Bill Auction		0.06%		
Wednesday September 08 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	3-Year Note Auction		0.47%		
6:00 PM	US	MBA 30-Year Mortgage Rate 03/SEP		3.03%		
6:00 PM	US	MBA Mortgage Applications 03/SEP		-2.40%		
7:55 PM	US	Redbook YoY 04/SEP		18.60%		
9:00 PM	US	IBD/TIPP Economic Optimism SEP		53.6		53
9:00 PM	US	JOLTs Job Openings JUL		10.073M		9.9M
9:30 PM	US	NY Fed Treasury Purchases TIPS 1 to 7.5 yrs			\$2.025B	
Thursday September 09 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	10-Year Note Auction		1.34%		
2:00 AM	US	Consumer Credit Change JUL		\$37.69B	\$25B	\$36B
3:30 AM	US	API Crude Oil Stock Change 03/SEP		-4.045M		
	CN	Inflation Rate YoY AUG		1.00%		0.90%
8:30 AM	CN	Inflation Rate MoM AUG		0.30%		0.20%
8:30 AM	CN	PPI YoY AUG		9%		9.10%
11:00 AM	ID	Retail Sales YoY JUL		2.50%		
6:45 PM	EA	Deposit Facility Rate		-0.50%	-0.50%	-0.50%
6:45 PM	EA	ECB Interest Rate Decision		0.00%	0%	0.00%
6:45 PM	EA	Marginal Lending Rate		0.25%		0.25%
7:30 PM	EA	ECB Press Conference				
7:30 PM	US	Initial Jobless Claims 04/SEP		340K		
7:30 PM	US	Jobless Claims 4-week Average SEP/04		355K		
7:30 PM	US	Continuing Jobless Claims 28/AUG		2748K		
9:30 PM	US	EIA Natural Gas Stocks Change 03/SEP				
9:30 PM	US	NY Fed Treasury Purchases 4.5 to 7 yrs			\$6.025B	
10:00 PM	US	EIA Crude Oil Stocks Change 03/SEP		-7.169M		
10:00 PM	US	EIA Gasoline Stocks Change 03/SEP		1.29M		
10:00 PM	US	EIA Crude Oil Imports Change 03/SEP		-0.045M		
10:00 PM	US	EIA Cushing Crude Oil Stocks Change 03/SEP		0.836M		
10:00 PM	US	EIA Distillate Fuel Production Change 03/SEP		-0.178M		
10:00 PM	US	EIA Distillate Stocks Change 03/SEP		-1.732M		
10:00 PM	US	EIA Heating Oil Stocks Change 03/SEP		0.005M		

10:00 PM	US	EIA Gasoline Production Change 03/SEP	-0.364M		
10:00 PM	US	EIA Refinery Crude Runs Change 03/SEP	-0.134M		
10:30 PM	US	8-Week Bill Auction			
10:30 PM	US	4-Week Bill Auction			
Friday September 10 2021			Actual	Previous	Consensus Forecast
12:00 AM	US	30-Year Bond Auction		2.04%	
	GB	Balance of Trade JUL		£-2.5B	£-3B
1:00 PM	GB	Construction Output YoY JUL		30%	10.50%
1:00 PM	GB	Industrial Production YoY JUL		8.30%	3.20%
1:00 PM	GB	Industrial Production MoM JUL		-0.70%	0.50%
1:00 PM	GB	GDP 3-Month Avg JUL		4.80%	4%
1:00 PM	GB	Manufacturing Production YoY JUL		13.90%	6.60%
1:00 PM	GB	GDP YoY JUL		15.20%	8.50%
1:00 PM	GB	Goods Trade Balance JUL		£-11.988B	£-12.7B
1:00 PM	GB	Manufacturing Production MoM JUL		0.20%	0.50%
1:00 PM	GB	GDP MoM JUL		1.00%	1.00%
7:30 PM	US	PPI MoM AUG		1%	0.60% 0.70%
7:30 PM	US	Core PPI YoY AUG		6.20%	6.70%
7:30 PM	US	Core PPI MoM AUG		1%	0.50% 0.60%
7:30 PM	US	PPI YoY AUG		7.80%	8.30%
8:00 PM	GB	NIESR Monthly GDP Tracker AUG		3.90%	3.00%
9:00 PM	US	Wholesale Inventories MoM JUL		1.20%	0.60% 0.60%
9:30 PM	US	NY Fed Treasury Purchases 2.25 to 4.5 yrs			\$8.425B
11:00 PM	US	WASDE Report			
	CN	Vehicle Sales YoY AUG		-11.90%	-10%

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