



Sumber : Tradingview, PT Erdikha Elit Sekuritas

Sectoral	Last		Change %
Basic Materials	1,178.77	⬇️	-0.07%
Consumer Cyclical	793.10	⬆️	0.94%
Energy	735.93	⬇️	-0.83%
Financials	1,321.84	⬇️	-0.03%
Healthcare	1,417.89	⬆️	0.94%
Industrials	953.48	⬇️	-0.51%
Infrastructures	884.80	⬇️	-0.22%
Consumer Non-Cyclical	707.68	⬇️	-0.35%
Properties & Real Estate	792.97	⬇️	-0.02%
Technology	11,345.61	⬆️	0.60%
Transportation & Logistic	998.79	⬆️	0.60%

***Data Update Pukul 15.30 WIB**

Commodities		Last	Change %
Palm Oil	RM	3,791.00	⬇️ -0.10%
Crude Oil	\$	71.99	⬇️ -0.29%
Nickel	\$	18,290.00	⬇️ -1.34%
Gold	\$	1,803.50	⬆️ 0.02%
Coal	\$	131.73	⬇️ -0.93%

***Data Update Terakhir Pukul 07.42 WIB**

Indeks	Close		Change %
Dow Jones Industrial	34,682	⬆️	0.30%
S&P 500	4,358	⬆️	0.34%
Nasdaq Composite	14,665	➡️	0.01%
FTSE 100 London	7,151	⬆️	0.71%
DAX Xetra Frankfurt	15,693	⬆️	1.17%
Shanghai Composite	3,554	⬆️	0.67%
Hangseng Index	27,924	⬇️	-0.53%
Nikkei 225 Osaka	28,367	⬇️	-0.96%

***Data Update Terakhir Pukul 07.42 WIB**

Indikator	Tingkat
Pertumbuhan ekonomi (Q1-2021)	-0.74%
Inflasi (Mei 2021)	1.68%
BI 7 Day Reverse Repo Rate (Feb 2021)	4%
Defisit anggaran (APBN 2021)	-5.17% PDB
Transaksi berjalan 2020	-0,40% PDB
Cadangan devisa (Mei 2020)	US\$ 136.39 miliar
Neraca Pembayaran Indonesia 2020	US\$ 4.1 miliar

IHSG	6,044.0	Net F *Sell*	-188.M
Change %	-0.05%	F Buy	4261.M
Net Foreign Buy (YTD)	12.50 T	D Buy	9498.M
Resistance	6,100	F Sell	4449.M
Support	6,000	D Sell	9310.M

Highlight News

IHSG OUTLOOK

Indeks pada perdagangan kemarin ditutup melemah pada level 6044. Ditransaksikan dengan volume yang cukup ramai jika dibandingkan dengan rata-rata volume 5 hari perdagangan. Indeks dibebani oleh sektor Energy (-0.825%), Industrials (-0.512%), Consumer Non-Cyclical (-0.351%), Infrastructures (-0.222%), Basic Materials (-0.07%), Financials (-0.029%), Properties & Real Estate (-0.015%), kendati ditopang oleh sektor Transportation & Logistic (0.176%), Technology (0.596%), Consumer Cyclical (0.94%), Healthcare (0.943%) yang mengalami penguatan walaupun tidak signifikan. Indeks pada hari ini diperkirakan akan bergerak pada range level support 6000 dan level resistance 6100.

Global Sentiment

Faktor yang mempengaruhi pergerakan indeks pada hari Rabu yakni terkait dari lonjakan kasus Covid-19 yang hingga kini berdasarkan data terakhir per hari Selasa Kementerian Kesehatan melaporkan jumlah pasien positif corona (Covid-19) di Indonesia mencapai 2.345.018 orang, atau bertambah 31.189 orang dari hari sebelumnya. Ini adalah rekor penambahan kasus harian tertinggi sejak virus Covid-19 mewabah di Tanah Air. bahkan dalam 14 hari terakhir, rata-rata tambahan pasien positif baru adalah 23.350 orang per hari, atau melonjak lebih dari 2 kali lipat ketimbang rerata 14 hari sebelumnya (10.628 orang setiap hari). Artinya, jelas kurva kasus Covid-19 Indonesia semakin meningkat tajam.

Saat ini pemerintah tengah memberlakukan kebijakan PPKM Darurat yang terbilang lebih ketat dibandingkan dengan sebelumnya. Kenaikan kasus harian yang terjadi membuat kekhawatiran pasar kembali muncul. Para pelaku pasar khawatir bahwa nantinya lonjakan ini akan mengganggu pertumbuhan ekonomi pada kuartal 3, yang akan sedikit terganggu. Bahkan untuk pertumbuhan ekonomi kuartal 2 2021 juga diproyeksikan akan sedikit meleset dari proyeksi yang ditetapkan oleh Bank Indonesia dan ibu Sri Mulyani yakni kisaran 5%-8%. Tidak hanya pertumbuhan ekonomi, beberapa indikator ekonomi lainnya serta indeks juga sedikit banyak akan terpengaruh oleh lonjakan kasus Covid-19 saat ini. Sehingga menurut pada kuartal 3 2021 meskipun indeks akan ada potensi kembali menguat namun penguatan yang terjadi cenderung tertahan karena adanya sentimen negatif terkait kenaikan lonjakan kasus Covid-19 ini. Meskipun demikian, masih ada beberapa sektor yang masih bisa diperhatikan pergerakannya salah satunya yakni sektor farmasi terkait obat-obatan dan rumah sakit.

Untuk hari Kamis (8/7/2021) ada beberapa katalis yang perlu dipehatikan oleh para pelaku pasar diantaranya yakni terkait cadangan minyak mentah US berdasarkan survei API yang di proyeksikan masih berkurang namun cenderung lebih baik dari sebelumnya yakni -3.925M dari -8.153M, kemudian akan rilis juga terkait data ketenagakerjaan US mengenai kalim pengangguran yang mana sebelumnya 392.75K dan diproyeksikan akan menurun menjadi 379.25K. Tren penurunan pada klaim pengangguran di US ini bisa menjadi salah satu katalis positif serta atnda bahwa memang saat ini angka pengangguran disana yang sempat tumbuh signifikan akibat Covid-19 perlahan sudha mulai berkurang. Dan beberpaa hari lalu the Fed juga smepat mengatakan bahwa bank sentral akan mulai mengubah kebijakan moneter apabila angka inflasi yang stabil di atas target 2% dan penciptaan lapangan kerja yang maksimal (maximum unemployment). Sehingga penurunan yang terjadi di klaim pengangguran US ini bisa menjadi salah satu katalis positif disana.

Kemudian selain dari US, di Jerman juga akan rilis terkiat data neraca perdaganagn, ekspor sert aimpornya selama bulan Mei. Dimana untuk neraca perdagangan diproyeksikan akan tumbuh sebesar €17.4B dari sebelumnya €15.5B, ekspor 0.6% dari 0.3% dan impornya yakni 0.4% dari -1.7%. Proyeksi yang cukup baik untuk indikator ekonomi Jerman, mengingat sebelumnya beberapa indikator ekonomi untuk negara-negara Eropa cenderung tumbuh melambat dibandingkan negara lainnya karna sempat ada lonjakan kasus dari varian terbaru Covid-19 disana. Namun kini beberpa data indikator ekonomi disana sudah terlihat cukup membaik.

Daily Recommendation						
Stock	Last Price	Recommendation	Target Price	Upside (%)	Stop Loss	Commentary
BMRI	5,750	Trading Buy	5850 - 6000	1.7% - 4.3%	5650	Net Foreign Buy Accumulation
BRIS	2,330	Speculative Buy	2380 - 2480	2.1% - 6.4%	2200	Huge Volume Accumulation
TLKM	3,030	Speculative Buy	3130 - 3250	3.3% - 7.3%	3000	Net Foreign Buy Accumulation
ACES	1,565	Trading Buy	1590 - 1620	1.6% - 3.5%	1500	Bullish Continuation
ASII	4,900	Trading Buy	4950 - 5000	1% - 2%	4850	Doji

Stock Watchlist

ECONOMIC CALENDAR

Sources: Trading Economics, Erdikha Research

Monday July 05 2021				Actual	Previous	Consensus	Forecast
8:45 AM	CN	Caixin Services PMI JUN		50.3	55.1		55
8:45 AM	CN	Caixin Composite PMI JUN		50.6	53.8		53.6
3:00 PM	EA	Markit Services PMI Final JUN		58.3	55.2	58.0	58.0
3:00 PM	EA	Markit Composite PMI Final JUN		59.5	57.1	59.2	59.2
3:00 PM	GB	New Car Sales YoY JUN		28%	674.1%		
3:30 PM	GB	Markit/CIPS UK Services PMI Final JUN		62.4	62.9	61.7	61.7
3:30 PM	GB	Markit/CIPS Composite PMI Final JUN		62.2	62.9	61.7	61.7
4:00 PM	EA	ECB President Lagarde Speech					
Tuesday July 06 2021				Actual	Previous	Consensus	Forecast
2:30 PM	EA	Construction PMI JUN		50.3	50.3		51.1
3:30 PM	GB	Construction PMI JUN		66.3	64.2	63.8	62.8
4:00 PM	EA	Retail Sales MoM MAY		4.6%	-3.9% ®	4.4%	3.7%
4:00 PM	EA	Retail Sales YoY MAY		9%	23.3% ®	8.2%	10.5%
4:00 PM	EA	ZEW Economic Sentiment Index JUL		61.2	81.3		78.9
4:45 PM	GB	10-Year Treasury Gilt Auction		0.819%	0.940%		
5:50 PM	US	LMI Logistics Managers Index Current JUN		75	71.3		
8:45 PM	US	Markit Services PMI Final JUN		64.6	70.4	64.8	64.8
8:45 PM	US	Markit Composite PMI Final JUN		63.7	68.7	63.9	63.9
9:00 PM	US	ISM Non-Manufacturing PMI JUN		60.1	64	63.5	63
9:00 PM	US	ISM Non-Manufacturing Business Activity JUN		60.4	66.2	66.4	65.7
9:00 PM	US	ISM Non-Manufacturing Prices JUN		79.5	80.6		81
9:00 PM	US	ISM Non-Manufacturing New Orders JUN		62.1	63.9		63
9:00 PM	US	ISM Non-Manufacturing Employment JUN		49.3	55.3		54
9:30 PM	US	NY Fed Treasury Purchases 0 to 2.25 yrs				\$12.425B	
10:30 PM	US	6-Month Bill Auction		0.050%	0.055%		
10:30 PM	US	3-Month Bill Auction		0.050%	0.050%		
Wednesday July 07 2021				Actual	Previous	Consensus	Forecast
12:00 AM	US	42-Day Bill Auction		0.045%	0.040%		
7:00 AM	US	Total Vehicle Sales JUN	***	15.4M	17M		
10:00 AM	ID	Foreign Exchange Reserves JUN		\$137.1B	\$136.4B		\$137B
1:00 PM	GB	Halifax House Price Index MoM JUN		-0.5%	1.2% ®		2%
1:00 PM	GB	Halifax House Price Index YoY JUN		8.8%	9.6% ®		12.3%
3:00 PM	CN	Foreign Exchange Reserves JUN		\$3.214T	\$3.22T	\$3.202T	\$3.2T
3:30 PM	GB	BBA Mortgage Rate JUN		3.62%	3.62%		3.62%
3:30 PM	GB	Labour Productivity QoQ Final Q1	***	0.7%	-4.3%		0.8%
6:00 PM	US	MBA Mortgage Applications 02/JUL		-1.8%	-6.9%		
6:00 PM	US	MBA 30-Year Mortgage Rate 02/JUL		3.15%	3.2%		
7:55 PM	US	Redbook YoY 03/JUL		19.4%	18.2%		
9:00 PM	US	JOLTs Job Openings MAY		9.209M	9.193M ®	9.388M	9.1M
9:00 PM	US	IBD/TIPP Economic Optimism JUL		54.3	56.4		56
9:30 PM	US	NY Fed Treasury Purchases 10 to 22.5 yrs				\$1.425B	
Thursday July 08 2021				Actual	Previous	Consensus	Forecast
	US	FOMC Minutes					
3:30 AM	US	API Crude Oil Stock Change 02/JUL		-7.983M	-8.153M	-3.925M	
7:30 PM	EA	ECB Monetary Policy Meeting Accounts					
7:30 PM	US	Initial Jobless Claims 03/JUL			364K	350K	320K
7:30 PM	US	Jobless Claims 4-week Average JUL/03			392.75K		379.25K
7:30 PM	US	Continuing Jobless Claims 26/JUN			3469K	3335K	3380K
9:30 PM	US	EIA Natural Gas Stocks Change 02/JUL			76Bcf	348cf	
9:30 PM	US	NY Fed Treasury Purchases 2.25 to 4.5 yrs				\$8.425B	
10:00 PM	US	EIA Crude Oil Stocks Change 02/JUL			-6.718M	-4.033M	
10:00 PM	US	EIA Gasoline Stocks Change 02/JUL			1.522M	-2.176M	
10:00 PM	US	EIA Refinery Crude Runs Change 02/JUL			0.187M		
10:00 PM	US	EIA Distillate Stocks Change 02/JUL			-0.869M	0.171M	
10:00 PM	US	EIA Distillate Fuel Production Change 02/JUL			-0.083M		
10:00 PM	US	EIA Heating Oil Stocks Change 02/JUL			0.016M		
10:00 PM	US	EIA Gasoline Production Change 02/JUL			-0.749M		
10:00 PM	US	EIA Cushing Crude Oil Stocks Change 02/JUL			-1.46M		
10:00 PM	US	EIA Crude Oil Imports Change 02/JUL			-0.603M		
10:30 PM	US	4-Week Bill Auction			0.050%		
10:30 PM	US	8-Week Bill Auction			0.045%		
Friday July 09 2021				Actual	Previous	Consensus	Forecast
2:00 AM	US	Consumer Credit Change MAY			\$18.61B	\$18.4B	\$19B
	CN	Inflation Rate YoY JUN			1.3%	1.3%	1.5%

8:30 AM	CN	<u>Inflation Rate MoM JUN</u>	-0.2%	0%	0.1%
8:30 AM	CN	<u>PPI YoY JUN</u>	9%	8.8%	8.9%
	GB	<u>Balance of Trade MAY</u>	£-0.9B		£-1.4B
1:00 PM	GB	<u>Industrial Production YoY MAY</u>	27.5%	21.6%	26.2%
1:00 PM	GB	<u>Industrial Production MoM MAY</u>	-1.3%	1.5%	1.2%
1:00 PM	GB	<u>GDP 3-Month Avg MAY</u>	1.5%	3.9%	3.7%
1:00 PM	GB	<u>Manufacturing Production YoY MAY</u>	39.7%	29.5%	30.6%
1:00 PM	GB	<u>Construction Output YoY MAY</u>	77.9%	58.3%	64%
1:00 PM	GB	<u>GDP YoY MAY</u>	27.6%	25.9%	25.1%
1:00 PM	GB	<u>Goods Trade Balance MAY</u>	£-10.96B	£-11.1B	£-12B
1:00 PM	GB	<u>GDP MoM MAY</u>	2.3%	1.5%	1.5%
1:00 PM	GB	<u>Manufacturing Production MoM MAY</u>	-0.3%	1%	1.1%
5:00 PM	EA	<u>ECB President Lagarde Speech</u>			
8:00 PM	GB	<u>NIESR Monthly GDP Tracker Q2</u>	3.8%		5.1%
9:00 PM	US	<u>Wholesale Inventories MoM MAY</u>	1%	1.1%	1.1%
9:30 PM	US	<u>NY Fed Treasury Purchases 22.5 to 30 yrs</u>		\$2.025B	

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