

IHSG	6,068.2
Change %	0.70%
Net Foreign Buy (YTD)	20.06 T
Resistance	6093
Support	5977
Net F *Buy*	830.5M
F Buy	3752.M
D Buy	9112.M
F Sell	2921.M
D Sell	9943.M



Sumber : Tradingview, PT Erdikha Elit Sekuritas

Sectoral	Last	Change %
Basic Materials	1,133.12	↑ 1.09%
Consumer Cyclical	783.11	↓ -0.66%
Energy	769.67	↑ 0.12%
Financials	1,370.18	↑ 0.39%
Healthcare	1,372.34	↑ 0.09%
Industrials	1,034.90	↑ 3.16%
Infrastructures	939.12	↑ 1.49%
Consumer Non-Cyclical	668.48	↑ 1.11%
Properties & Real Estate	806.58	↑ 0.63%
Technology	9,920.03	↓ -0.33%
Transportation & Logistic	1,059.39	↓ -0.85%

*Data Update Pukul 15.30 WIB

Commodities	Last	Change %
Palm Oil	RM 4,391.00	↓ -0.02%
Crude Oil	\$ 67.90	↓ -0.35%
Nickel	\$ 20,075.00	↑ 1.74%
Gold	\$ 1,794.80	↑ 0.04%
Coal	\$ 177.50	↑ 0.08%

*Data Update Terakhir Pukul 07.42 WIB

Indeks	Close	Change %
Dow Jones Industrial	34,879	↓ -0.43%
S&P 500	4,493	↓ -0.46%
Nasdaq Composite	15,248	↓ -0.25%
FTSE 100 London	7,016	↓ -1.13%
DAX Xetra Frankfurt	15,623	→ 0.08%
Shanghai Composite	3,693	↑ 0.49%
Hangseng Index	25,716	↓ -2.36%
Nikkei 225 Osaka	30,008	↓ -0.57%

*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 membentuk pola candle hammer pada level 6068. Ditransaksikan dengan volume yang cukup ramai jika dibandingkan dengan rata-rata volume 5 hari perdagangan. Indeks ditopang oleh sektor Industrials (3.155%), Infrastructures (1.485%), Consumer Non-Cyclical (1.106%), Basic Materials (1.093%), Properties & Real Estate (0.63%), Financials (0.394%), Energy (0.12%), Healthcare (0.085%), kendati dibebani oleh sektor Technology (-0.329%), Consumer Cyclical (-0.664%), Transportation & Logistic (-0.849%) yang mengalami pelemahan walaupun belum signifikan. Indeks pada hari ini diperkirakan akan bergerak pada range level support 5977 dan level resistance 6093.

Global Sentiment

Untuk bursa US pada penutupan hari Kamis, Indeks Dow Jones Industrial Average drop 151,7 poin ke 34.879,38. Indeks S&P 500 tertekan 0,46% ke 4.493,28 atau terkoreksi di hari keempat, sedangkan Nasdaq tertekan 0,25% menjadi 15.248,25. Sepanjang pekan berjalan, ketiganya kini terhitung melemah.

Klaim Pengangguran US Kembali Turun

Data klaim pengangguran telah rilis, yakni sebesar 310.000 lebih rendah dibandingkan dengan ekspektasi polling Dow Jones sebesar 335.000 serta lebih baik jika dibandingkan dengan pekan sebelumnya yang mencapai 340.000. Penurunan yang terjadi didorong oleh pembukaan kembali bisnis dan awal tahun ajaran dan terlepas dari risiko yang ditimbulkan oleh kebangkitan COVID-19 yang sedang berlangsung dan kekurangan pasokan tenaga kerja. Tunjangan pengangguran US juga sebelumnya ditingkatkan terutama untuk tunjangan negara bagian reguler dari bantuan pandemi pemerintah yakni sebesar US\$ 300 yang akan berakhir pada 6 September 2021 kemarin. Namun, meskipun kembali adanya perbaikan dari data klaim pengangguran ini untuk ketiga indeks utama Bursa US sendiri tercatat terkoreksi.

Pertemuan The Fed di Bulan September Masih Menjadi Perhatian Investor

Pada 21-22 Septmber 2021 bank sentral US yakni The Fed akan kembali melakukan rapat yang diperkirakan salah satu agendanya akan membahas terkait pengumuman mengenai langkah-langkah atau skema untuk pengurangan pembelian surat utang dipasar yang selama ini dijalankan dengan nilai US\$ 120 miliar per bulan. Hasil dari rapat pada pertemuan September ini akan menjadi salah satu katalis pendorong indeks bursa US dan global termasuk negara-negara berkembang seperti Indonesia karena meskipun diproyeksikan dampak yang ditimbuolkan tidak akan sesignifikan pada tahun 2013 yang saat itu menimbulkan Tantrum karena kurangnya keterbukaan bank sentral terhadap pasar terkait kebijakan, namun tetap saja akan ada respon pasar dari adanya kebijakan Tapering yang akan dilakukan hingga akhir tahun 2021 ini. Sehingga katalis ini menjadi katalis yang diperhatikan oleh investor sejak beberapa bulan lalu.

Penjualan Ritel Indonesia Tekontraksi -2,9% (YoY)

Penjualan ritel dibulan juli tekontraksi sebesar 2,9% secara tahunan. Penurunan ini terjadi karena adanya langkah-langkah pembatasan oleh pemerintah yakni PPKM yang diberlakukan di Jawa dan Bali guna meminimalisir serta menurunkan angka kasus harian Covid-19 pada periode Juli. Beberapa pusat perbelanjaan juga belum boleh buka pada periode tersebut, mobilitas terbatas karna aktivitas diluar dibatasi dan diperketat dengan beberapa aturan dan beberapa pegawai juga melakukan work from home (WFH). Penjualan menurun untuk pakaian (-16,0% vs 39,9% di bulan Juni), suku cadang & aksesoris otomotif (-13,5% vs 22,8%), barang budaya & rekreasi (-20,0% vs -4,5%), peralatan informasi & komunikasi (-36,4% vs -31,8%), peralatan rumah tangga (-22,3% vs -5,7%). Selain itu, penjualan tumbuh lebih rendah untuk makanan, minuman & tembakau (6,7% vs 7,3%) dan bahan bakar (4,5% vs 47,4%).

Stock Recommendation

Stock	Last Price	Recommendation	Target Price	Upside (%)	Stop Loss	Commentary
ASII	5,450	Buy	5500 - 5650	0.9% - 3.7%	5250	Bullish Morubozu
UNTR	21,800	Speculative Buy	22350 - 22800	2.5% - 4.6%	21150	Consolidation
TOWR	1,390	Trading Buy	1410 - 1430	1.4% - 2.9%	1360	Morning Star
ANTM	2,440	Trading Buy	2490 - 2540	2% - 4.1%	2360	Huge volume accumulation
TINS	1,500	Trading Buy	1530 - 1570	2% - 4.7%	1450	Consolidation
			-			
			-			
			-			
			-			
			-			

Stock Watchlist

ECONOMIC CALENDAR



Sources: Trading Economics, Erdikha Research

Monday September 06 2021			Actual	Previous	Consensus	Forecast
2:30 PM	EA	<u>Construction PMI AUG</u>	49.5	49.8		50.6
2:30 PM	GB	<u>BoE Saunders Speech</u>				
3:00 PM	GB	<u>New Car Sales YoY AUG</u>	-22%	-29.50%		-16%
3:30 PM	GB	<u>Construction PMI AUG</u>	55.2	58.7	56.9	56.5
Tuesday September 07 2021			Actual	Previous	Consensus	Forecast
10:00 AM	CN	<u>Balance of Trade AUG</u>	\$58.34B	\$56.59B ®	\$51.05B	\$51B
10:00 AM	CN	<u>Exports YoY AUG</u>	25.60%	19.30%	17.10%	18%
10:00 AM	CN	<u>Imports YoY AUG</u>	33.10%	28.10%	26.80%	25%
10:00 AM	ID	<u>Foreign Exchange Reserves AUG</u>	\$144.8B	\$137.3B		\$138B
1:00 PM	GB	<u>Halifax House Price Index YoY AUG</u>	7.10%	7.60%		7.30%
1:00 PM	GB	<u>Halifax House Price Index MoM AUG</u>	0.70%	0.40%	1.10%	1%
3:00 PM	CN	<u>Foreign Exchange Reserves AUG</u>	\$3.232T	\$3.236T	\$3.227T	\$3.2T
3:30 PM	GB	<u>BBA Mortgage Rate AUG</u>	3.61%	3.61%		3.61%
4:00 PM	EA	<u>Employment Change QoQ Final Q2</u>	0.70%	-0.20%	0.50%	0.50%
4:00 PM	EA	<u>Employment Change YoY Final Q2</u>	1.80%	-1.80%	1.80%	1.80%
4:00 PM	EA	<u>GDP Growth Rate QoQ 3rd Est Q2</u>	2.20%	-0.30%	2%	2%
4:00 PM	EA	<u>GDP Growth Rate YoY 3rd Est Q2</u>	14.30%	-1.2% ®	13.60%	13.60%
4:00 PM	EA	<u>ZEW Economic Sentiment Index SEP</u>	31.1	42.7		30
5:30 PM	US	<u>LMI Logistics Managers Index Current</u>	73.8	74.5		
9:00 PM	US	<u>3-Month Bill Auction</u>	0.05%	0.05%		
9:00 PM	US	<u>6-Month Bill Auction</u>	0.05%	0.06%		
9:30 PM	US	NY Fed Treasury Purchases 10 to 22.5 yrs			\$1.425B	
10:30 PM	US	<u>52-Week Bill Auction</u>	0.08%	0.08%		
10:30 PM	US	<u>21-Day Bill Auction</u>	0.05%	0.04%		
Wednesday September 08 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	<u>3-Year Note Auction</u>	0.45%	0.47%		
7:00 AM	US	<u>Total Vehicle Sales AUG</u>	13.06M	14.8M		
10:00 AM	ID	<u>Consumer Confidence AUG</u>	77.3	80.2		
6:00 PM	US	<u>MBA 30-Year Mortgage Rate 03/SEP</u>	3.03%	3.03%		
6:00 PM	US	<u>MBA Mortgage Applications 03/SEP</u>	-1.90%	-2.40%		
7:55 PM	US	<u>Redbook YoY 04/SEP</u>	16.50%	18.60%		
9:00 PM	US	<u>IBD/TIPP Economic Optimism SEP</u>	48.5	53.6		53
9:00 PM	US	<u>JOLTs Job Openings JUL</u>	10.934M	10.185M ®	10M	9.9M
9:30 PM	US	NY Fed Treasury Purchases TIPS 1 to 7.5 yrs			\$2.025B	
10:30 PM	US	<u>119-Day Bill Auction</u>	0.05%	0.05%		
Thursday September 09 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	<u>10-Year Note Auction</u>	1.34%	1.34%		
1:00 AM	US	<u>Fed Beige Book</u>				
2:00 AM	US	<u>Consumer Credit Change JUL</u>	\$17B	\$37.86B ®	\$25B	\$29B
3:30 AM	US	<u>API Crude Oil Stock Change 03/SEP</u>	-2.882M	-4.045M	-3.832M	
	CN	<u>Inflation Rate YoY AUG</u>	0.80%	1.00%	1%	1%
8:30 AM	CN	<u>Inflation Rate MoM AUG</u>	0.10%	0.30%	0.50%	0.40%
8:30 AM	CN	<u>PPI YoY AUG</u>	9.50%	9%	9%	9.10%
10:00 AM	ID	<u>Retail Sales YoY JUL</u>	-2.90%	2.50%		3%
6:45 PM	EA	<u>Deposit Facility Rate</u>	-0.50%	-0.50%	-0.50%	-0.50%
6:45 PM	EA	<u>ECB Interest Rate Decision</u>	0.00%	0.00%	0%	0.00%
6:45 PM	EA	<u>Marginal Lending Rate</u>	0.25%	0.25%		0.25%
7:30 PM	EA	<u>ECB Press Conference</u>				
7:30 PM	US	<u>Initial Jobless Claims 04/SEP</u>	310K	345K ®	335K	336K
7:30 PM	US	<u>Jobless Claims 4-week Average SEP/04</u>	339.5K	356.25K ®		344.75K
7:30 PM	US	<u>Continuing Jobless Claims 28/AUG</u>	2783K	2805K ®	2744K	2743K
9:30 PM	US	<u>EIA Natural Gas Stocks Change 03/SEP</u>	52Bcf	20Bcf	40Bcf	
9:30 PM	US	NY Fed Treasury Purchases 4.5 to 7 yrs			\$6.025B	
10:00 PM	US	<u>EIA Crude Oil Stocks Change 03/SEP</u>	-1.529M	-7.169M	-4.612M	

10:00 PM	US	EIA Gasoline Stocks Change 03/SEP	-7.215M	1.29M	-3.39M	
10:00 PM	US	EIA Crude Oil Imports Change 03/SEP	0.168M	-0.045M		
10:00 PM	US	EIA Cushing Crude Oil Stocks Change 03/SEP	1.918M	0.836M		
10:00 PM	US	EIA Distillate Fuel Production Change 03/SEP	-0.625M	-0.178M		
10:00 PM	US	EIA Distillate Stocks Change 03/SEP	-3.142M	-1.732M	-2.617M	
10:00 PM	US	EIA Heating Oil Stocks Change 03/SEP	0.399M	0.005M		
10:00 PM	US	EIA Gasoline Production Change 03/SEP	0.237M	-0.364M		
10:00 PM	US	EIA Refinery Crude Runs Change 03/SEP	-1.636M	-0.134M		
10:30 PM	US	4-Week Bill Auction	0.06%	0.04%		
10:30 PM	US	8-Week Bill Auction	0.07%	0.07%		
Friday September 10 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	30-Year Bond Auction	1.91%	2.04%		
12:00 AM	US	Fed Bowman Speech				
1:00 AM	US	Fed Williams Speech				
	GB	Balance of Trade JUL		£-2.5B		£-2B
1:00 PM	GB	Construction Output YoY JUL		30%	10.90%	10.50%
1:00 PM	GB	Manufacturing Production YoY JUL		13.90%	6%	6.60%
1:00 PM	GB	Industrial Production YoY JUL		8.30%	3%	3.20%
1:00 PM	GB	Industrial Production MoM JUL		-0.70%	0.40%	0.50%
1:00 PM	GB	GDP 3-Month Avg JUL		4.80%	3.80%	4%
1:00 PM	GB	GDP YoY JUL		15.20%	8%	8.50%
1:00 PM	GB	Goods Trade Balance JUL		£-11.988B	£-11B	£-11.2B
1:00 PM	GB	Manufacturing Production MoM JUL		0.20%	0.10%	0.50%
1:00 PM	GB	GDP MoM JUL		1.00%	0.60%	0.70%
7:30 PM	US	PPI MoM AUG		1%	0.60%	0.70%
7:30 PM	US	Core PPI YoY AUG		6.20%	6.60%	6.70%
7:30 PM	US	Core PPI MoM AUG		1%	0.50%	0.60%
7:30 PM	US	PPI YoY AUG		7.80%	8.20%	8.30%
8:00 PM	GB	NIESR Monthly GDP Tracker AUG		3.90%	4.40%	4.00%
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				
	EA	Eurogroup Meeting				

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