



Sumber : Tradingview, PT Erdikha Elit Sekuritas

Sectoral	Last		Change %
Basic Materials	1,168.14	↓	-2.28%
Consumer Cyclical	735.95	↓	-1.62%
Energy	741.56	↓	-2.12%
Financials	1,332.92	↓	-0.36%
Healthcare	1,238.40	↓	-1.39%
Industrials	963.45	↓	-0.27%
Infrastructures	930.56	↓	-0.13%
Consumer Non-Cyclical	689.47	↓	-2.07%
Properties & Real Estate	789.94	↓	-1.67%
Technology	10,852.93	↑	0.12%
Transportation & Logistic	1,016.99	↑	0.12%

*Data Update Pukul 15.30 WIB

Commodities		Last		Change %
Palm Oil	RM	3,415.00	↓	-0.27%
Crude Oil	\$	71.58	↑	0.41%
Nickel	\$	17,490.00	→	0.00%
Gold	\$	1,772.05	↑	0.50%
Coal	\$	119.30	→	0.00%

*Data Update Terakhir Pukul 07.42 WIB

Indeks	Close		Change %
Dow Jones Industrial	33,290	↓	-1.58%
S&P 500	4,166	↓	-1.31%
Nasdaq Composite	14,030	↓	-0.93%
FTSE 100 London	7,017	↓	-1.90%
DAX Xetra Frankfurt	15,448	↓	-1.78%
Shanghai Composite	3,525	↓	-0.01%
Hangseng Index	28,801	↑	0.85%
Nikkei 225 Osaka	28,964	↓	-0.19%

*Data Update Terakhir Pukul 07.42 WIB

Indikator	Tingkat
Pertumbuhan ekonomi (Q1-2021)	-0.74%
Inflasi (April 2021)	1.42%
BI 7 Day Reverse Repo Rate (Feb 2021)	4%
Defisit anggaran (APBN 2021)	-6.09% PDB
Transaksi berjalan 2020	-0,40% PDB
Cadangan devisa (April 2020)	US\$ 138.3 miliar
Neraca Pembayaran Indonesia 2020	US\$ 2,6 miliar

Daily Recommendation						
Stock	Last Price	Recommendation	Target Price	Upside (%)	Stop Loss	Commentary
BBRI	3,910	Buy on weakness	3950 - 4040	1% - 3.3%	3830	Bearish Morubozu
BBCA	31,625	Buy on weakness	32100 - 32600	1.5% - 3.1%	31350	Buy on break @31800
ASII	5,000	Speculative Buy	5150 - 5250	3% - 5%	4925	Bearish Continuation
PGAS	1,060	Speculative Buy	1090 - 1110	2.8% - 4.7%	1035	Bearish Continuation

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Stock Watchlist

IHSG	6,007.1	Net F *Sell*	-193.M
Change %	-1.01%	F Buy	5308.M
Net Foreign Buy (YTD)	12.64 T	D Buy	11690M
Resistance	6,060	F Sell	5501.M
Support	5,940	D Sell	11496M

Highlight News

IHSG OUTLOOK
Indeks pada perdagangan minggu lalu ditutup melemah membentuk pola bearish breakway pada level 6007. Ditransaksikan dengan volume yang cukup ramai jika dibandingkan dengan rata-rata volume 5 hari perdagangan.Indeks dibebani oleh sektor Basic Materials (-2.275%), Consumer Cyclical (-1.621%), Energy (-2.123%), Financials (-0.363%), Healthcare (-1.393%), Industrials (-0.273%), Infrastructures (-0.132%), Consumer Non-Cyclical (-2.074%), Properties & Real Estate (-1.668%),Transportation & Logistic (-2.174%) kendati ditopang oleh sektorTechnology (0.117%) yang mengalami penguatan walaupun tidak signifikan. Indeks pada hari ini diperkirakan akan bergerak pada range level support 5940 dan level resistance 6060.

Global Sentiment
Pergerakan indeks pada minggu lalu cenderung masih mengalami pelemahan, dan kalau kita lihat dari sisi net sell yang ada di indeks kita itu terlihat net sell asing tidak begitu besar, artinya dari domestiklah yang cenderung melakukan aksi jual. Hal ini terjadi dikarenakan jumlah kasus Covid-19 di Indonesia semakin meningkat dan cukup signifikan, bahkan di untuk DKI Jakarta sendiri yang merupakan kota dengan kenaikan kasus Covid-19 yang tertinggi kemungkinan akan dilakukan pembatasan sosial kembali atau PPKM Mikro.
Munculnya kekhawatiran para pelaku pasar akan kenaikan kasus ini cukup menekan pergerakan indek di penghujung pekan kali ini. Rilisnya data suku bunga yang tertahan dilevel yang sama tidak ammpu menopang pergerakan indeks, lantaran para pelaku pasar juga khawatir akan terganggunya aktivitas ekonomi yang terjadi seperti beberapa bulan lalu yang bisa menurunkan proyeksi pertumbuhan 2Q21 yang sebelumnya sempat diproyeksikan akan tumbuh hingga 8%. Selain dari keniakan kasus Covid-19 domestik, faktor lainnya yang membuat indeks tumbang hari ini adalah karena turunnya beberapa komoditas acuan yang mempengaruhi beberapa emiten dikarenakan kenaikan dollar US yang membuat harga komoditas semakin mahal sehingga mengganggu demand atau permintaan yang ada.
Untuk minggu ini, ada beberapa indikator ekonomi yang perlu diperhatikan oleh para pelaku pasar diantaranya yakni Loan Prime Rate dari China yang diproyeksikan masih akan cenderung stagnan di 3.85%, Indeks Kepercayaan Euro Area yang yang cenderung masih tumbuh negatif yakni -3, kemudian data dari MaRKIT manUFACTURING PMI Flas dari sejumlah negara seperti US, Jerman, dan Euro Area. Kemudian dari Domedtik sendiri akan rilis data terkait Loan Growth pada hari Kamis. Untuk Senin (21/6/2021) yang perlu diperhatikan oleh investor yakni selain dari perkembangan kasus Covid-19 secara domestik dan global, rilis dari data loan prime rate China juga perlu diperhatikan.

ECONOMIC CALENDAR

Sources: Trading Economics, Erdikha Research

Monday June 21 2021			Actual	Previous	Consensus	Forecast
	CN	<u>Loan Prime Rate 1Y</u>		3.85%		3.85%
8:30 AM	CN	<u>Loan Prime Rate 5Y JUN</u>		4.65%		4.65%
7:30 PM	US	<u>Chicago Fed National Activity Index MAY</u>		0.24		0.15
9:15 PM	EA	<u>ECB President Lagarde Speech</u>				
9:30 PM	US	<u>NY Fed Treasury Purchases 10 to 22.5 yrs</u>			\$1.425B	
10:30 PM	US	<u>6-Month Bill Auction</u>		0.040%		
10:30 PM	US	<u>3-Month Bill Auction</u>		0.025%		
Tuesday June 22 2021			Actual	Previous	Consensus	Forecast
2:00 AM	US	<u>Fed Williams Speech</u>				
1:00 PM	GB	<u>Public Sector Net Borrowing MAY</u>		£-31.7B	£-26.1B	£-28.4B
5:00 PM	GB	<u>CBI Industrial Trends Orders JUN</u>		17		25
7:55 PM	US	<u>Redbook YoY 19/JUN</u>		16.4%		
9:00 PM	EA	<u>Consumer Confidence Flash JUN</u>		-5.1	-3	-3
9:00 PM	EA	<u>ECB Lane Speech</u>				
9:00 PM	US	<u>Existing Home Sales MoM MAY</u>		-2.7%		-1%
9:00 PM	US	<u>Existing Home Sales MAY</u>		5.85M	5.72M	5.7M
9:00 PM	US	<u>Richmond Fed Manufacturing Index JUN</u>		18		16
9:30 PM	US	<u>NY Fed Treasury Purchases TIPS 1 to 7.5 yrs</u>			\$2.025B	
10:00 PM	US	<u>Fed Daly Speech</u>				
10:30 PM	US	<u>42-Day Bill Auction</u>		0.015%		
Wednesday June 23 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	<u>2-Year Note Auction</u>		0.152%		
12:30 AM	EA	<u>ECB Schnabel Speech</u>				
1:00 AM	US	<u>Fed Chair Powell Testimony</u>				
3:30 AM	US	<u>API Crude Oil Stock Change 18/JUN</u>		-8.537M		
2:30 PM	EA	<u>ECB Guindos Speech</u>				
3:00 PM	EA	<u>ECB Non-Monetary Policy Meeting</u>				
3:00 PM	EA	<u>Markit Manufacturing PMI Flash JUN</u>		63.1	62.2	62.2
3:00 PM	EA	<u>Markit Services PMI Flash JUN</u>		55.2	57.5	57.6
3:00 PM	EA	<u>Markit Composite PMI Flash JUN</u>		57.1	58.8	58.9
3:30 PM	GB	<u>Markit/CIPS UK Services PMI Flash JUN</u>		62.9	63	62.5
3:30 PM	GB	<u>Markit/CIPS Manufacturing PMI Flash JUN</u>		65.6	64	64.5
3:30 PM	GB	<u>Markit/CIPS Composite PMI Flash JUN</u>		62.9	63	62.7
6:00 PM	US	<u>MBA Mortgage Applications 18/JUN</u>		4.2%		
6:00 PM	US	<u>MBA 30-Year Mortgage Rate 18/JUN</u>		3.11%		
7:30 PM	US	<u>Current Account Q1</u>		\$-188.5B	\$-207B	\$-193B
8:10 PM	US	<u>Fed Bowman Speech</u>				
8:45 PM	US	<u>Markit Manufacturing PMI Flash JUN</u>		62.1	61.5	61
8:45 PM	US	<u>Markit Services PMI Flash JUN</u>		70.4	70	69
8:45 PM	US	<u>Markit Composite PMI Flash JUN</u>		68.7		67
9:00 PM	US	<u>New Home Sales MoM MAY</u>		-5.9%		-2.1%
9:00 PM	US	<u>New Home Sales MAY</u>		0.863M	0.875M	0.85M
9:30 PM	US	<u>EIA Gasoline Stocks Change 18/JUN</u>		1.954M		
9:30 PM	US	<u>EIA Crude Oil Stocks Change 18/JUN</u>		-7.355M		
9:30 PM	US	<u>EIA Distillate Stocks Change 18/JUN</u>		-1.023M		
9:30 PM	US	<u>EIA Gasoline Production Change 18/JUN</u>		0.495M		
9:30 PM	US	<u>EIA Distillate Fuel Production Change 18/JUN</u>		0.138M		
9:30 PM	US	<u>EIA Refinery Crude Runs Change 18/JUN</u>		0.412M		
9:30 PM	US	<u>EIA Cushing Crude Oil Stocks Change 18/JUN</u>		-2.15M		
9:30 PM	US	<u>EIA Crude Oil Imports Change 18/JUN</u>		-0.845M		
9:30 PM	US	<u>EIA Heating Oil Stocks Change 18/JUN</u>		-0.518M		
9:30 PM	US	<u>NY Fed Treasury Purchases 4.5 to 7 yrs</u>			\$6.025B	
10:00 PM	US	<u>Fed Bostic Speech</u>				
10:30 PM	US	<u>2-Year FRN Auction</u>		0.030%		
Thursday June 24 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	<u>5-Year Note Auction</u>		0.788%		
2:30 PM	ID	<u>Loan Growth YoY MAY</u>		-2.28%		
3:00 PM	EA	<u>ECB General Council Meeting</u>				
	GB	<u>BoE Interest Rate Decision</u>		0.1%	0.1%	0.1%
6:00 PM	GB	<u>BoE MPC Vote Cut</u>		0/9	0/9	0/9
6:00 PM	GB	<u>BoE MPC Vote Unchanged</u>		09-Sep	09-Sep	09-Sep
6:00 PM	GB	<u>BoE MPC Vote Hike</u>		0/9	0/9	0/9
6:00 PM	GB	<u>MPC Meeting Minutes</u>				
6:00 PM	GB	<u>BoE Quantitative Easing</u>		£875B	£875B	£875B

6:35 PM	EA	<u>ECB Panetta Speech</u>			
	US	<u>Durable Goods Orders MoM MAY</u>	-1.3%	2.7%	2%
7:30 PM	US	<u>GDP Price Index QoQ Final Q1</u>	1.9%	4.3%	4.3%
7:30 PM	US	<u>Corporate Profits QoQ Final Q1</u>	-3.3%		-0.8%
7:30 PM	US	<u>GDP Growth Rate QoQ Final Q1</u>	4.3%	6.4%	6.4%
7:30 PM	US	<u>Durable Goods Orders Ex Transp MoM MAY</u>	1%	0.7%	0.6%
7:30 PM	US	<u>Goods Trade Balance Adv MAY</u>	\$-85.23B		\$-84B
7:30 PM	US	<u>Wholesale Inventories MoM Adv MAY</u>	0.8%		0.4%
7:30 PM	US	<u>Jobless Claims 4-week Average JUN/19</u>	395K		383K
7:30 PM	US	<u>Initial Jobless Claims 19/JUN</u>	412K	380K	360K
7:30 PM	US	<u>Continuing Jobless Claims 12/JUN</u>	3518K	3458K	3520K
7:30 PM	US	<u>Durable Goods Orders ex Defense MoM MAY</u>	0%		0.2%
7:30 PM	US	<u>Core PCE Prices QoQ Final Q1</u>	1.3%	2.5%	2.5%
7:30 PM	US	<u>PCE Prices QoQ Final Q1</u>	1.5%	3.7%	3.7%
9:30 PM	US	<u>NY Fed Treasury Purchases 22.5 to 30 yrs</u>		\$2.025B	
9:30 PM	US	<u>EIA Natural Gas Stocks Change 18/JUN</u>	16Bcf		
10:00 PM	US	<u>Fed Williams Speech</u>			
10:00 PM	US	<u>Kansas Fed Manufacturing Index JUN</u>	32		29
10:30 PM	US	<u>4-Week Bill Auction</u>	0.045%		
10:30 PM	US	<u>8-Week Bill Auction</u>	0.035%		
	EU	<u>European Council Meeting</u>			
Friday June 25 2021			Actual	Previous	Consensus Forecast
12:00 AM	US	<u>7-Year Note Auction</u>		1285%	
3:30 AM	US	<u>Fed Bank Stress Test Results</u>			
	GB	<u>Gfk Consumer Confidence JUN</u>		-9	-7
3:00 PM	EA	<u>Loans to Households YoY MAY</u>	3.8%		4%
3:00 PM	EA	<u>Loans to Companies YoY MAY</u>	3.2%		3.4%
3:00 PM	EA	<u>M3 Money Supply YoY MAY</u>	9.2%	8.5%	8.8%
5:00 PM	GB	<u>CBI Distributive Trades JUN</u>	18		20
6:00 PM	GB	<u>BoE Quarterly Bulletin</u>			
	US	<u>Personal Income MoM MAY</u>	-13.1%	-2.5%	-3%
	US	<u>Personal Spending MoM MAY</u>	0.5%	0.3%	0.4%
7:30 PM	US	<u>PCE Price Index YoY MAY</u>	3.6%		4.2%
7:30 PM	US	<u>PCE Price Index MoM MAY</u>	0.6%		0.8%
7:30 PM	US	<u>Core PCE Price Index YoY MAY</u>	3.1%	3.4%	3.5%
7:30 PM	US	<u>Core PCE Price Index MoM MAY</u>	0.7%	0.6%	0.6%
9:00 PM	US	<u>Michigan Inflation Expectations Final JUN</u>	4.6%		4%
9:00 PM	US	<u>Michigan Consumer Sentiment Final JUN</u>	82.9	86.5	86.4
9:00 PM	US	<u>Michigan 5 Year Inflation Expectations Final JUN</u>	3%		2.8%
9:00 PM	US	<u>Michigan Consumer Expectations Final JUN</u>	78.8		83.8
9:00 PM	US	<u>Michigan Current Conditions Final JUN</u>	89.4		90.6
9:30 PM	US	<u>NY Fed Treasury Purchases 2.25 to 4.5 yrs</u>		\$8.425B	

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