



Sumber : Tradingview, PT Erdikha Elit Sekuritas

Sectoral	Last		Change %
Basic Materials	1,191.24	⬆️	2.86%
Consumer Cyclical	740.12	⬆️	0.80%
Energy	738.74	⬆️	0.77%
Financials	1,354.25	⬆️	2.04%
Healthcare	1,335.28	⬇️	-0.98%
Industrials	964.45	⬆️	1.74%
Infrastructures	933.93	⬆️	0.74%
Consumer Non-Cyclical	699.32	⬆️	0.81%
Properties & Real Estate	794.66	⬆️	2.18%
Technology	10,864.19	⬆️	0.74%
Transportation & Logistic	1,019.91	⬆️	0.74%

*Data Update Pukul 15.30 WIB

Commodities		Last		Change %
Palm Oil	RM	3,390.00	➡️	0.00%
Crude Oil	\$	72.95	⬆️	0.14%
Nickel	\$	17,690.00	⬇️	-0.20%
Gold	\$	1,777.45	⬇️	-0.05%
Coal	\$	121.00	⬆️	1.68%

*Data Update Terakhir Pukul 07.42 WIB

Indeks	Close		Change %
Dow Jones Industrial	33,946	⬆️	0.20%
S&P 500	4,246	⬆️	0.51%
Nasdaq Composite	14,253	⬆️	0.79%
FTSE 100 London	7,090	⬆️	0.39%
DAX Xetra Frankfurt	15,636	⬆️	0.21%
Shanghai Composite	3,557	⬆️	0.80%
Hangseng Index	28,313	⬇️	-0.62%
Nikkei 225 Osaka	28,884	⬆️	3.12%

*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

IHSG	6,087.8	Net F *Sell*	-472.M
Change %	1.53%	F Buy	2447.M
Net Foreign Buy (YTD)	14.26 T	D Buy	9588.M
Resistance	6,120	F Sell	2919.M
Support	6,040	D Sell	9115.M

Highlight News

IHSG OUTLOOK
Indeks pada perdagangan kemarin ditutup menguat pada level 6087. Ditransaksikan dengan volume yang cukup ramai jika dibandingkan dengan rata-rata volume 5 hari perdagangan.Indeks ditopang oleh sektor Basic Materials (2.863%), Properties & Real Estate (2.176%), Financials (2.041%), Industrials (1.74%), Consumer Non-Cyclical (0.812%), Consumer Cyclical (0.804%), Energy (0.77%), Technology (0.744%), Infrastructures (0.74%), kendati dibebani oleh sektor Transportation & Logistic (-0.849%), Healthcare (-0.984%) yang mengalami pelemahan walaupun tidak signifikan. Indeks pada hari ini diperkirakan akan bergerak pada range level support 6040 dan level resistance 6120.

Global Sentiment
Sentimen pertama yaitu yg perlu dicermati dari paparan Ketua Bank Sentral AS The Fed. Jerome Powell mengatakan bahwa perekonomian AS saat ini terus membaik. Pemulihan tersebut membawa dampak berupa tekanan inflasi yang mulai terasa beberapa bulan terakhir. Saat ini, permintaan meningkat pesat tetapi belum bisa dibarengi oleh kecepatan dunia usaha dalam menghasilkan barang dan jasa. Nantinya, dunia usaha akan mampu beradaptasi sehingga bisa memenuhi lonjakan permintaan. Selain itu, Powell juga menyinggung soal pasar tenaga kerja. Menurutnya, penciptaan lapangan kerja akan semakin luas seiring cepatnya laju vaksinasi dan pembukaan kembali aktivitas masyarakat. Oleh karena itu, Powell mengungkapkan bahwa tidak akan terburu-buru menaikkan suku bunga acuan. Percepatan laju inflasi saja tidak cukup untuk memaksa The Fed menaikkan Federal Funds Rate, apalagi inflasi dipandang hanya bersifat sementara. Sebelumnya, investor khawatir bahwa inflasi tinggi akan bersifat persisten sehingga The Fed bakal mempercepat pengetatan kebijakan moneter (tapering off). Isu taper tantrum yang mereda membuat pelaku pasar lebih tenang memborong aset-aset berisiko seperti layaknya saham.
Sentimen kedua yaitu dari dalam negeri perkembangan pandemi virus corona. Angka kasus yang masih tinggi membuat investor (dan seluruh rakyat Indonesia) wajib waspada. Selama 14 hari terakhir, rata-rata penambahan pasien baru adalah 10.628 orang per hari. Melonjak tajam dibandingkan rerata 14 hari sebelumnya yakni 5.938 orang setiap harinya. Hal yang patut menjadi perhatian adalah angka kasus aktif yang terus meningkat. Kasus aktif menggambarkan pasien yang masih dalam perawatan, baik di fasilitas kesehatan maupun mandiri. Data ini menggambarkan seberapa berat beban yang ditanggung sistem pelayanan kesehatan di suatu negara. Perkembangan semacam ini, apalagi kalau terus memburuk, akan membuat reopening di Indonesia Indonesia tertunda. Akibatnya, ekonomi dan kesejahteraan rakyat sulit untuk didongkrak karena yang ada pembatasan bakal semakin ketat. Tanpa reopening, aktivitas ekonomi dunia usaha dan rumah tangga sulit untuk tumbuh. Selain itu, Badan Pemeriksa Keuangan (BPK) menyampaikan kekhawatiran soal ini. Ketua BPK Agung Firman Sampurna mengungkapkan tren penambahan utang pemerintah dan biaya bunga telah melampaui PDB dan penerimaan negara, yang dikhawatirkan pemerintah tidak mampu untuk membayarnya. BPK juga mengungkapkan bahwa utang pada 2020 telah melampaui batas yang direkomendasikan Dana Moneter Internasional (IMF). Oleh karena itu, Indonesia harus mampu menjinakkan virus corona kalau tidak ingin lebih banyak korban berjatuhan dan dapat membuka aktivitas perekonomiannya kembali.

Daily Recommendation						
Stock	Last Price	Recommendation	Target Price	Upside (%)	Stop Loss	Commentary
BBRI	4,040	Buy	4170 - 4250	3.2% - 5.2%	4000	Goldencross
AGRO	1,445	Hold	1460 - 1495	1% - 3.5%	1420	Huge volume accumulation
PGAS	1,055	Speculative Buy	1090 - 1110	3.3% - 5.2%	1035	Goldencross
LPPF	1,800	Speculative Buy	1855 - 1900	3.1% - 5.6%	1725	Huge volume accumulation
MLPL	730	Speculative Buy	750 - 775	2.7% - 6.2%	710	Consolidation
EMTK	2,450	Speculative Buy	2530 - 2680	3.3% - 9.4%	2310	Huge volume accumulation
CTRA	950	Speculative Buy	980 - 1000	3.2% - 5.3%	900	Goldencross
			-			
			-			
			-			

Stock Watchlist

ECONOMIC CALENDAR

Sources: Trading Economics, Erdikha Research

Monday June 21 2021			Actual	Previous	Consensus	Forecast
	CN	<u>Loan Prime Rate 1Y</u>	<u>3.85%</u>	3.85%		<u>3.85%</u>
8:30 AM	CN	Loan Prime Rate 5Y JUN	<u>4.65%</u>	4.65%		4.65%
7:30 PM	US	<u>Chicago Fed National Activity Index MAY</u>	<u>0.29</u>	-0.09 [®]		<u>0.15</u>
9:15 PM	EA	<u>ECB President Lagarde Speech</u>				
9:30 PM	US	NY Fed Treasury Purchases 10 to 22.5 yrs			\$1.425B	
10:30 PM	US	<u>6-Month Bill Auction</u>	<u>0.06%</u>	0.04%		
10:30 PM	US	<u>3-Month Bill Auction</u>	<u>0.05%</u>	0.03%		
Tuesday June 22 2021			Actual	Previous	Consensus	Forecast
2:00 AM	US	<u>Fed Williams Speech</u>				
10:00 AM	ID	<u>M2 Money Supply YoY MAY</u>	<u>8.10%</u>	11.50%		
1:00 PM	GB	<u>Public Sector Net Borrowing MAY</u>	<u>£-24.3B</u>	£-29.1B [®]	<u>£-26.1B</u>	<u>£-28.4B</u>
5:00 PM	GB	<u>CBI Industrial Trends Orders JUN</u>	<u>19</u>	17	<u>18</u>	<u>25</u>
7:55 PM	US	<u>Redbook YoY 19/JUN</u>	<u>17.60%</u>	16.40%		
9:00 PM	EA	<u>Consumer Confidence Flash JUN</u>	<u>-3.3</u>	-5.1	<u>-3</u>	<u>-3</u>
9:00 PM	EA	<u>ECB Lane Speech</u>				
9:00 PM	US	<u>Existing Home Sales MoM MAY</u>	<u>-0.90%</u>	-2.70%		<u>-1%</u>
9:00 PM	US	<u>Existing Home Sales MAY</u>	<u>5.8M</u>	5.85M	<u>5.72M</u>	<u>5.7M</u>
9:00 PM	US	<u>Richmond Fed Manufacturing Index JUN</u>	<u>22</u>	18		<u>16</u>
9:30 PM	US	NY Fed Treasury Purchases TIPS 1 to 7.5 yrs			\$2.025B	
10:00 PM	US	<u>Fed Daly Speech</u>				
10:30 PM	US	42-Day Bill Auction	<u>0.04%</u>	0.02%		
Wednesday June 23 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	<u>2-Year Note Auction</u>	<u>0.25%</u>	0.15%		
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>	<u>-7.199M</u>	-8.537M	<u>-3.625M</u>	
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	<u>62.1</u>	<u>62.2</u>
3:00 PM	EA	<u>Markit Services PMI Flash JUN</u>		55.2	<u>57.8</u>	<u>57.6</u>
3:00 PM	EA	<u>Markit Composite PMI Flash JUN</u>		57.1	<u>58.8</u>	<u>58.9</u>
3:30 PM	GB	<u>Markit/CIPS UK Services PMI Flash JUN</u>		62.9	<u>63</u>	<u>62.5</u>
3:30 PM	GB	<u>Markit/CIPS Manufacturing PMI Flash JUN</u>		65.6	<u>64</u>	<u>64.5</u>
3:30 PM	GB	<u>Markit/CIPS Composite PMI Flash JUN</u>		62.9	<u>62.8</u>	<u>62.7</u>
6:00 PM	US	<u>MBA Mortgage Applications 18/JUN</u>		4.20%		
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	<u>\$-206.8B</u>	<u>\$-193B</u>
8:10 PM	US	<u>Fed Bowman Speech</u>				
8:45 PM	US	<u>Markit Manufacturing PMI Flash JUN</u>		62.1	<u>61.5</u>	<u>61</u>
8:45 PM	US	<u>Markit Services PMI Flash JUN</u>		70.4	<u>70</u>	<u>69</u>
8:45 PM	US	<u>Markit Composite PMI Flash JUN</u>		68.7		<u>67</u>
9:00 PM	US	<u>New Home Sales MoM MAY</u>		-5.90%		<u>-2.10%</u>
9:00 PM	US	<u>New Home Sales MAY</u>		0.863M	<u>0.87M</u>	<u>0.85M</u>
9:30 PM	US	<u>EIA Gasoline Stocks Change 18/JUN</u>		1.954M	<u>0.833M</u>	
9:30 PM	US	<u>EIA Crude Oil Stocks Change 18/JUN</u>		-7.355M	<u>-3.942M</u>	
9:30 PM	US	<u>EIA Distillate Stocks Change 18/JUN</u>		-1.023M	<u>1.083M</u>	
9:30 PM	US	<u>EIA Distillate Fuel Production Change 18/JUN</u>		0.138M		
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 Refinery Crude Runs Change 18/JUN</u>		0.412M		
9:30 PM	US	<u>EIA Gasoline Production Change 18/JUN</u>		0.495M		
9:30 PM	US	<u>EIA Heating Oil Stocks Change 18/JUN</u>		-0.518M		
9:30 PM	US	NY Fed Treasury Purchases 4.5 to 7 yrs			\$6.025B	
10:00 PM	US	<u>Fed Bostic Speech</u>				

10:30 PM	US	2-Year FRN Auction		0.03%		
Thursday June 24 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	<u>5-Year Note Auction</u>		0.79%		
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>		0.10%	0.10%	0.10%
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>		9-Sep	9-Sep	9-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>		-1.30%	2.80%	2%
7:30 PM	US	<u>GDP Price Index QoQ Final Q1</u>		1.90%	4.30%	4.30%
7:30 PM	US	<u>Corporate Profits QoQ Final Q1</u>		-3.30%		-0.80%
7:30 PM	US	<u>GDP Growth Rate QoQ Final Q1</u>		4.30%	6.40%	6.40%
7:30 PM	US	<u>Durable Goods Orders Ex Transp MoM MAY</u>		1%	0.80%	0.60%
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>		0.80%		0.40%
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>Core PCE Prices QoQ Final Q1</u>		1.30%	2.50%	2.50%
7:30 PM	US	<u>PCE Prices QoQ Final Q1</u>		1.50%	3.70%	3.70%
7:30 PM	US	<u>Durable Goods Orders ex Defense MoM MAY</u>		0%		0.20%
7:30 PM	US	<u>Continuing Jobless Claims 12/JUN</u>		3518K	3470K	3520K
9:30 PM	US	<u>EIA Natural Gas Stocks Change 18/JUN</u>		16Bcf		
9:30 PM	US	<u>NY Fed Treasury Purchases 22.5 to 30 yrs</u>			\$2.025B	
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>		0.05%		
10:30 PM	US	<u>8-Week Bill Auction</u>		0.04%		
Friday June 25 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	<u>7-Year Note Auction</u>		1.29%		
3:30 AM	US	<u>Fed Bank Stress Test Results</u>				
	GB	<u>Gfk Consumer Confidence JUN</u>		-9	-7	-7
3:00 PM	EA	<u>Loans to Households YoY MAY</u>		3.80%		4%
3:00 PM	EA	<u>Loans to Companies YoY MAY</u>		3.20%		3.40%
3:00 PM	EA	<u>M3 Money Supply YoY MAY</u>		9.20%	8.50%	8.80%
5:00 PM	GB	<u>CBI Distributive Trades JUN</u>		18	14	15
6:00 PM	GB	<u>BoE Quarterly Bulletin</u>				
	US	<u>Personal Income MoM MAY</u>		-13.10%	-2.50%	-3%
	US	<u>Personal Spending MoM MAY</u>		0.50%	0.40%	0.40%
7:30 PM	US	<u>PCE Price Index YoY MAY</u>		3.60%		4.20%
7:30 PM	US	<u>PCE Price Index MoM MAY</u>		0.60%		0.80%
7:30 PM	US	<u>Core PCE Price Index YoY MAY</u>		3.10%	3.40%	3.50%
7:30 PM	US	<u>Core PCE Price Index MoM MAY</u>		0.70%	0.60%	0.60%
9:00 PM	US	<u>Michigan Inflation Expectations Final JUN</u>		4.60%		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%		2.80%
9:00 PM	US	<u>Michigan Consumer Expectations Final JUN</u>		78.8	84	83.8
9:00 PM	US	<u>Michigan Current Conditions Final JUN</u>		89.4	90.7	90.6
9:30 PM	US	<u>NY Fed Treasury Purchases 2.25 to 4.5 yrs</u>			\$8.425B	
	EU	<u>European Council Meeting</u>				

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