



Sumber : Tradingview, PT Erdikha Elit Sekuritas

Sectoral	Last		Change %
Basic Materials	1,189.91	⬆️	0.26%
Consumer Cyclical	745.85	⬆️	0.95%
Energy	734.69	⬆️	0.97%
Financials	1,326.90	⬆️	0.15%
Healthcare	1,306.75	⬆️	0.64%
Industrials	971.60	⬇️	-0.13%
Infrastructures	918.95	⬇️	-0.56%
Consumer Non-Cyclical	696.51	⬆️	0.53%
Properties & Real Estate	786.28	⬇️	-0.30%
Technology	10,793.34	⬇️	-0.63%
Transportation & Logistic	1,003.87	⬇️	-0.63%

*Data Update Pukul 15.30 WIB

Commodities		Last		Change %
Palm Oil	RM	3,516.00	⬇️	-0.12%
Crude Oil	\$	74.28	⬆️	0.31%
Nickel	\$	18,615.00	⬆️	1.04%
Gold	\$	1,780.00	⬇️	-0.02%
Coal	\$	127.15	⬆️	1.83%

*Data Update Terakhir Pukul 07.42 WIB

Indeks	Close		Change %
Dow Jones Industrial	34,434	⬆️	0.69%
S&P 500	4,281	⬆️	0.33%
Nasdaq Composite	14,360	⬇️	-0.07%
FTSE 100 London	7,136	⬆️	0.37%
DAX Xetra Frankfurt	15,608	⬆️	0.12%
Shanghai Composite	3,608	⬆️	1.15%
Hangseng Index	29,288	⬆️	1.41%
Nikkei 225 Osaka	29,066	⬆️	0.66%

*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	6,022.4	Net F *Buy*	44,95M
Change %	0.17%	F Buy	2183,M
Net Foreign Buy (YTD)	13.96	T D Buy	8132,M
Resistance	6,060	F Sell	2138,M
Support	5,980	D Sell	8177,M

Highlight News

IHSG OUTLOOK
Indeks pada perdagangan kemarin ditutup menguat pada level 6022. Ditransaksikan dengan volume yang cukup ramai jika dibandingkan dengan rata-rata volume 5 hari perdagangan. Indeks ditopang oleh sektor Energy (0,97%), Consumer Cyclical (0,953%), Healthcare (0,642%), Consumer Non-Cyclical (0,531%), Basic Materials (0,264%), Financials (0,145%), kendati dibebani oleh sektor Industrials (-0,125%), Properties & Real Estate (-0,295%), Infrastructures (-0,556%), Technology (-0,628%), Transportation & Logistic (-0,967%) yang mengalami pelemahan walaupun tidak signifikan. Indeks pada hari ini diperkirakan akan bergerak pada range level support 5980 dan level resistance 6060.

Global Sentiment
Pergerakan indeks pada minggu lalu cenderung mengalami penguatan, karena turunnya kekhawatiran para pelau pasar terhadap tapering yang dilakukan oleh The Fed, meskipun dari domestik masih terdapat risiko terkait lonjakan kasus Covid-19, sehingga meskipun kini market sudah terlihat optimis namun kekhawatiran akan lonjakan kasus Covidi-19 masih membayangi pasar, sehingga para pelaku pasar perlu memperhatikan perkembangan kasus tersebut.
Beberapa indikator ekonomi yang perlu diperhatikan oleh investor pada pekan ini yakni rilis terkait data ekonomi dari Jepang mengenai unemployment rate yang disecara tahunan untuk bulan Mei diproyeksikan akan meningkat menjadi 2.9% dari 2.8%, kemudian penjualan eceran Jepang bulan Mei diproyeksikan akan cenderung mengalami penurunan yakni 7.9% dari 12%. Selain dari Jepang dari Euro Area dan juga Jerman juga akan rilis data terkait Indeks kepercayaan konsumen Euro Area yang diproyeksikan masih tumbuh minus atau berkontraksi namun cenderung meningkat dibandingkan dengan sebelumnya, tingkat inflasi yang cenderung masih melemah, lalu untuk Jerman akan rilis data terkait Inflasi baik secara tahunan ataupun bulanan, yang mana untuk tahunan diproyeksikan akan turun dibandingkan dengan sebelumnya yakni 2.35 dari 2.5%.
Masih dari Jerman, pada pekan ini akan rilis juga data terkait Import Price Mei dan Unemployment rate Juni, serta Markit Manufacturing PMI dan Penjualan ecerannya yang diproyeksikan masih akan cenderung melemah. Kemudian dari katalis bursa Eropa, beralih ke US yang mana untuk beberapa data yang perlu diperhatikan antara lain House Price Indeks, cadangan minyak mentah US menurut survei API dan EIA, serta data Markit Manfuacturing PMI Final selama Juni US yang diproyeksikan ekspansi namun melambat yakni 61 dari sebelumnya 61,2.
Untuk domestik sendiri yang perlu diperhatikan oleh para pelaku pasar yakni rilisnya data inflasi baik secara tahunan maupun bulanan yang sebelumnya cukup mengalami kenaikan yang signifikan masing-masing 1.68% dan 0.32%. Untuk proyeksinya kami memproyeksikan masih akan mengalami kenaikan namun tidak sesignifikan sebelumnya, karena selama dua periode April dan Mei itu terdapat momentum khusus yakni ramadhan dan lebaran, sehingga wajar apabila ada kenaikan inflasi yang cukup signifikan disana. Kemudian selain inflasi, dari domestik akan rilis juga data terkait Tourist Arrival yang masih berkontraksi karena dampak dari pandemi Covid-19.

Daily Recommendation						
Stock	Last Price	Recommendation	Target Price	Upside (%)	Stop Loss	Commentary
INCO	4,540	Trading Buy	4620 - 4700	1.8% - 3.5%	4490	Huge volume accumulation
ADRO	1,285	Trading Buy	1310 - 1340	1.9% - 4.3%	1255	Goldencross
MIKA	2,750	Speculative Buy	2820 - 2880	2.5% - 4.7%	2720	Doji
IRRA	1,700	Speculative Buy	1760 - 1850	3.5% - 8.8%	1540	Huge volume accumulation
BRIS	1,945	Speculative Buy	2010 - 2090	3.3% - 7.5%	1915	Buy if break @1950
			-			
			-			
			-			
			-			
			-			

Stock Watchlist

ECONOMIC CALENDAR

Sources: Trading Economics, Erdikha Research

Monday June 28 2021			Actual	Previous	Consensus	Forecast
3:10 PM	EA	ECB Panetta Speech				
7:00 PM	GB	BoE Haldane Speech				
8:00 PM	US	Fed Williams Speech				
9:00 PM	EA	ECB Guindos Speech				
9:30 PM	US	Dallas Fed Manufacturing Index JUN		34.9		31
9:30 PM	US	NY Fed Treasury Purchases 10 to 22.5 yrs			\$1.425B	
10:30 PM	US	6-Month Bill Auction		0.055%		
10:30 PM	US	3-Month Bill Auction		0.045%		
Tuesday June 29 2021			Actual	Previous	Consensus	Forecast
12:10 AM	US	Fed Quarles Speech				
1:00 PM	GB	Nationwide Housing Prices YoY JUN		10.9%	13.7%	13.3%
1:00 PM	GB	Nationwide Housing Prices MoM JUN		1.8%	0.7%	1%
3:00 PM	GB	Car Production YoY MAY		34573%		1500%
3:30 PM	GB	Mortgage Approvals MAY		86.9K	85.34K	82K
3:30 PM	GB	Mortgage Lending MAY		£3.3B		£3.4B
3:30 PM	GB	BoE Consumer Credit MAY		£-0.377B	£0.328B	£0.2B
3:30 PM	GB	Net Lending to Individuals MoM MAY		£2.9B		£3.0B
4:00 PM	EA	Consumer Confidence Final JUN		-5.1	-3.3	-3.3
4:00 PM	EA	Economic Sentiment JUN		114.5	116.5	115.9
4:00 PM	EA	Industrial Sentiment JUN		11.5	13	11.9
4:00 PM	EA	Services Sentiment JUN		11.3	16	14.5
4:00 PM	EA	Consumer Inflation Expectations JUN		22.2		21.5
7:55 PM	US	Redbook YoY 26/JUN		17.6%		
8:00 PM	US	S&P/Case-Shiller Home Price MoM APR		2.2%		1.9%
8:00 PM	US	S&P/Case-Shiller Home Price YoY APR		13.3%	14.5%	13.8%
8:00 PM	US	Fed Barkins Speech				
8:00 PM	US	House Price Index YoY APR		13.9%		14.4%
8:00 PM	US	House Price Index MoM APR		1.4%		0.8%
8:40 PM	EA	ECB President Lagarde Speech				
9:00 PM	US	CB Consumer Confidence JUN		117.2	119	119
9:30 PM	US	NY Fed Treasury Purchases TIPS 7.5 to 30 yrs			\$1.225B	
Wednesday June 30 2021			Actual	Previous	Consensus	Forecast
3:30 AM	US	API Crude Oil Stock Change 25/JUN		-7.199M		
	CN	NBS Manufacturing PMI JUN		51.0	50.7	50.9
8:00 AM	CN	Non Manufacturing PMI JUN		55.2		55
1:00 PM	GB	Current Account Q1		£-26.3B	£-12.5B	£-16B
1:00 PM	GB	Business Investment YoY Final Q1		-7.4%		-18.1%
1:00 PM	GB	Business Investment QoQ Final Q1		5.9%		-11.9%
1:00 PM	GB	GDP Growth Rate QoQ Final Q1		1.3%	-1.5%	-1.5%
1:00 PM	GB	GDP Growth Rate YoY Final Q1		-7.3%	-6.1%	-6.1%
4:00 PM	EA	Core Inflation Rate YoY Flash JUN		1%	0.9%	1%
4:00 PM	EA	Inflation Rate YoY Flash JUN		2%	1.9%	2%
4:00 PM	EA	Inflation Rate MoM Flash JUN		0.3%		0.4%
6:00 PM	GB	BoE Haldane Speech				
6:00 PM	US	MBA Mortgage Applications 25/JUN		2.1%		
6:00 PM	US	MBA 30-Year Mortgage Rate 25/JUN		3.18%		
7:15 PM	US	ADP Employment Change JUN		978K	600K	450K
8:45 PM	US	Chicago PMI JUN		75.2	70	72
9:00 PM	US	Pending Home Sales YoY MAY		51.7%		25%
9:00 PM	US	Pending Home Sales MoM MAY		-4.4%	-1%	-2%
9:30 PM	US	EIA Gasoline Stocks Change 25/JUN		-2.93M		
9:30 PM	US	EIA Crude Oil Stocks Change 25/JUN		-7.614M		
9:30 PM	US	EIA Distillate Stocks Change 25/JUN		1.754M		
9:30 PM	US	EIA Gasoline Production Change 25/JUN		0.401M		
9:30 PM	US	EIA Distillate Fuel Production Change 25/JUN		0.056M		
9:30 PM	US	EIA Refinery Crude Runs Change 25/JUN		-0.225M		
9:30 PM	US	EIA Cushing Crude Oil Stocks Change 25/JUN		-1.833M		
9:30 PM	US	EIA Crude Oil Imports Change 25/JUN		0.43M		
9:30 PM	US	EIA Heating Oil Stocks Change 25/JUN		0.199M		
9:30 PM	US	NY Fed Treasury Purchases 7 to 10 yrs			\$3.225B	
11:00 PM	US	Quarterly Grain Stocks - Corn JUN		7.701B	4.144B	
11:00 PM	US	Quarterly Grain Stocks - Soy JUN		1.564B	0.787B	
11:00 PM	US	Quarterly Grain Stocks - Wheat JUN		1.314B	0.859B	
Thursday July 01 2021			Actual	Previous	Consensus	Forecast

7:30 AM	ID	Markit Manufacturing PMI JUN	55.3		54.9
	CN	Caixin Manufacturing PMI JUN	52	51.8	51.9
11:00 AM	ID	Inflation Rate YoY JUN	1.68%		1.9%
11:00 AM	ID	Inflation Rate MoM JUN	0.32%		0.3%
11:00 AM	ID	Tourist Arrivals YoY MAY	-19.33%		-15%
11:00 AM	ID	Core Inflation Rate YoY JUN	1.37%		1.5%
2:00 PM	EA	ECB President Lagarde Speech			
3:00 PM	EA	Markit Manufacturing PMI Final JUN	63.1	63.1	63.1
3:00 PM	GB	BoE Gov Bailey Speech			
3:30 PM	GB	Markit/CIPS Manufacturing PMI Final JUN	65.6	64.2	64.2
4:00 PM	EA	Unemployment Rate MAY	8%	8%	7.9%
4:00 PM	EA	ECB Enria Speech			
4:30 PM	EA	ECB Elderson Speech			
6:30 PM	US	Challenger Job Cuts JUN	24.586K		30K
7:30 PM	US	Jobless Claims 4-week Average JUN/26	397.75K		393.25K
7:30 PM	US	Initial Jobless Claims 26/JUN	411K	386K	370K
7:30 PM	US	Continuing Jobless Claims 19/JUN	3390K	3384K	3320K
8:45 PM	US	Markit Manufacturing PMI Final JUN	62.1	62.6	62.6
9:00 PM	US	Construction Spending MoM MAY	0.2%	0.4%	0.6%
9:00 PM	US	ISM Manufacturing PMI JUN	61.2	61	61
9:00 PM	US	ISM Manufacturing Prices JUN	88	86.5	89
9:00 PM	US	ISM Manufacturing New Orders JUN	67		66
9:00 PM	US	ISM Manufacturing Employment JUN	50.9		51
9:30 PM	US	NY Fed Treasury Purchases 22.5 to 30 yrs		\$2.025B	
9:30 PM	US	EIA Natural Gas Stocks Change 25/JUN	55Bcf		
10:30 PM	US	8-Week Bill Auction	0.050%		
10:30 PM	US	4-Week Bill Auction	0.045%		
Friday July 02 2021			Actual	Previous	Consensus
4:00 PM	EA	PPI MoM MAY	1%	1.2%	1.2%
4:00 PM	EA	PPI YoY MAY	7.6%	9.5%	9.5%
	US	Non Farm Payrolls JUN	559K	675K	650K
	US	Balance of Trade MAY	\$-68.9B	\$-71.3B	\$-71.6B
7:30 PM	US	Unemployment Rate JUN	5.8%	5.7%	5.7%
7:30 PM	US	Nonfarm Payrolls Private JUN	492K	580K	570K
7:30 PM	US	Average Hourly Earnings YoY JUN	2%	3.6%	2.1%
7:30 PM	US	Participation Rate JUN	61.6%		61.7%
7:30 PM	US	Average Weekly Hours JUN	34.9	34.9	34.9
7:30 PM	US	Government Payrolls JUN	67K		80K
7:30 PM	US	Manufacturing Payrolls JUN	23K	30K	25K
7:30 PM	US	Average Hourly Earnings MoM JUN	0.5%	0.3%	0.4%
7:30 PM	US	Exports MAY	\$204.99B		\$204.4B
7:30 PM	US	Imports MAY	\$273.89B		\$276.0B
9:00 PM	US	Factory Orders MoM MAY	-0.6%	1.5%	1.2%
9:00 PM	US	Factory Orders ex Transportation MAY	0.5%		0.3%

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