



Sectoral	Last	Change %
AGRI	1.447,20	↓ -1,08%
BASIC-IND	987,66	↑ 1,45%
CONSUMER	1.718,74	↑ 0,58%
FINANCE	1.426,25	↓ -0,74%
INFRASTRUC	1.052,32	↓ -1,38%
MANUFACTUR	1.309,10	↑ 0,67%
MINING	1.818,07	↓ -2,05%
MISC-IND	1.029,73	↓ -1,01%
PROPERTY	374,94	↓ -1,39%
TRADE	858,93	↓ -0,24%

*Data Update Pukul 15.30 WIB

Commodities	Last	Change %
Palm Oil RM	3.752,00	↑ 0,14%
Crude Oil \$	61,83	↑ 0,44%
Nickel \$	16.180,00	↓ -0,22%
Gold \$	1.712,70	↑ 0,04%
Coal \$	89,00	↓ -2,73%

*Data Update Terakhir Pukul 07.42 WIB

Indeks	Close	Change %
Dow Jones Industrial	33.171	↑ 0,30%
S&P 500	3.971	↓ -0,09%
Nasdaq Composite	13.060	↓ -0,60%
FTSE 100 London	6.744	→ 0,06%
DAX Xetra Frankfurt	14.830	↑ 0,55%
Shanghai Composite	3.435	↑ 0,50%
Hangseng Index	28.338	→ 0,01%
Nikkei 225 Osaka	29.385	↑ 0,71%

*Data Update Terakhir Pukul 07.42 WIB

Corporate Action	Code	Event
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Indikator	Tingkat
Pertumbuhan ekonomi (2020 YoY)	-2,07%
Inflasi (Januari 2021, %YoY)	1,38%
BI 7 Day Reverse Repo Rate (Feb 2021)	4%
Defisit anggaran (APBN 2021)	-5,17% PDB
Transaksi berjalan 2020	-0,40% PDB
Cadangan devisa (Feb 2020)	US\$ 138 miliar
Neraca Pembayaran Indonesia 2020	US\$ 2,6 miliar

IHSG	6.166,8	Net F *Buy*	45,63M
Change %	-0,46%	F Buy	2791,M
Net Foreign Buy (YTD)	10,20 T	D Buy	7652,M
Resistance	6.230	F Sell	2745,M
Support	6.100	D Sell	7698,M

Highlight

- Soal Rights Issue Jumbo Chandra Asri (TPIA), Ini Pernyataan Barito (BPRT)
- Sumber Alfaria Trijaya (AMRT) akan menjual kepemilikan di Alfatrex
- Jababeka (KIIJA) Klaim Kinerja Kuartal I/2021 Naik Signifikan Dibanding Tahun 2020

IHSG OUTLOOK

Indeks pada perdagangan kemarin ditutup melemah ke level 6166. Ditransaksikan dengan volume yang relatif sepi jika dibandingkan dengan rata-rata volume 5 hari perdagangan. Indikator stochastic juga nampak berpotensi terjadi golden cross yang mengindikasikan akan ada potensi teknikal rebound. Indeks hari ini ditutup melemah oleh sektor Mining (-2,054%), Property (-1,393%), Infrastructure (-1,382%), Agriculture (-1,08%), Miscellaneous Industry (-1,006%), Finance (-0,737%), Trade (-0,24%), kendati ditopang oleh sektor Consumer (0,58%), Manufacture (0,666%), Basic Industry (1,452%) yang mengalami penguatan walaupun belum signifikan. Indeks pada hari ini diperkirakan akan bergerak konsolidasi pada range pergerakan 6100 - 6230

Global Sentiment

Pelaku pasar perlu mencermati sentimen dari bursa saham Amerika Serikat (AS), Wall Street pada hari ini, di mana bursa saham Negeri Paman Sam ditutup bervariasi namun mayoritas melemah pada perdagangan kemarin. Penyebab Wall Street kembali lesu adalah aksi jual (profit taking) saham perbankan AS, akibat terkena margin call. Beberapa saham perbankan pun ada yang mengakui terkena forced sell (jual paksa) atas posisinya di short selling (jual kosong).

Sementara, fokus investor AS saat ini adalah memantau kemajuan rencana stimulus infrastruktur Presiden AS Joe Biden yang ditambah hingga US\$ 3 triliun, dan akan diumumkan detilnya dalam kunjungan kerjanya ke Pittsburgh Rabu (31/3/2021) mendatang.

Kemajuan cepat pergerakan imbal hasil (yield) obligasi baru-baru ini juga perlu dicermati oleh pasar, sehingga pelaku pasar dapat melakukan penyesuaian besar dalam portofolio investasinya. Pasar juga memantau data tenaga kerja Maret yang menurut dalam polling Dow Jones berujung pada estimasi 630.000 orang yang mendapat pekerjaan baru, sehingga angka pengangguran surut menjadi 6% dari semula 6,2%.

Pada hari ini pelaku pasar juga perlu mencermati beberapa data ekonomi yang akan dirilis pada hari ini. Di kawasan Asia, data ekonomi yang akan dirilis pada hari ini adalah data tingkat pengangguran Jepang dan penjualan ritel Jepang. Sementara untuk di kawasan Eropa dan AS, data ekonomi yang akan dirilis pada hari ini adalah data indeks keyakinan konsumen periode Maret 2021. (source : CNBC Indonesia)

Stock News

- PT Barito Pacific Tbk. (BRPT) memastikan bahwa penambahan modal dengan hak Memesan Efek Terlebih Dahulu (HMETD) atau rights issue oleh salah satu entitas usahanya, PT Chandra Asri Petrochemical Tbk. (TPIA), akan tetap dilaksanakan. Direktur Barito Pacific David Kosasih mengatakan bahwa entitas usahanya terus mencari waktu yang tepat menggelar aksi rights issue tersebut. Untuk diketahui, entitas usaha BRPT di sektor petrokimia, TPIA, berencana menggelar RUPS pada 15 April 2021 untuk kembali meminta restu pemegang saham melaksanakan rights issue. (source : Bisnis.com)

- Emiten minimarket PT Sumber Alfaria Trijaya Tbk (AMRT) berencana menjual kepemilikannya di PT Sumber Wahana Sejahtera atau yang dikenal dengan nama Alfatrex. Alfatrex merupakan anak usaha AMRT yang bergerak di bidang jasa titipan dan pengiriman. Saat ini, AMRT merupakan pengendali Sumber Wahana Sejahtera dengan kepemilikan langsung sebesar 99,96%. Pada Kamis, 25 Maret 2021, AMRT menandatangani lembar ketentuan indikatif (term sheet), salah satunya dengan PT Galaxy Mitra Global yang akan mengambil alih kepemilikan AMRT di Alfatrex. (source : kontan.co.id)

- Emiten pengembang lahan industri PT Kawasan Industri Jababeka Tbk. optimis kinerja perseroan bakal lebih baik pada 2021 kendati belum akan kembali seperti pencapaian sebelum pandemi. Sekretaris Perusahaan Jababeka Muljadi Sugand mengatakan kinerja perseroan pada kuartal I/2021 ini sudah berada di jalur pemulihan. Muljadi mengungkapkan kontribusi penjualan properti pada tiga bulan pertama tahun ini masih dominan dari investasi langsung asing (foreign direct investment/FDI) sekitar 70 persen dan sisanya berasal dari domestik. (source : Bisnis.com)

Daily Recommendation

Stock	Last Price	Recommendation	Target Price	Upside (%)	Stop Loss	Commentary
AGRO	1.080	Hold	1140 - 1160	5,6% - 7,4%	1080	Consolidation
ASII	5.525	Hold	5700 - 5750	3,2% - 4,1%	5450	Consolidation
CTRA	1.185	Hold	1200 - 1240	1,3% - 4,6%	1100	Consolidation
SMRA	990	Hold	1030 - 1070	4% - 8,1%	950	Death Cross
KRAS	610	Hold	650 - 680	6,6% - 11,5%	600	Consolidation
AKRA	3.270	Hold	3480 - 3600	6,4% - 10,1%	3230	Consolidation
MEDC	600	Hold	625 - 640	4,2% - 6,7%	580	Consolidation
ELSA	362	Hold	380 - 392	5% - 8,3%	350	Consolidation

Stock Watchlist



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ECONOMIC CALENDAR

Tuesday, 30 March 2021

Sources: Trading Economics, Erdikha Research

Monday March 29 2021			Actual	Previous	Consensus	Forecast
3:30 PM	GB	BoE Consumer Credit FEB	£-1.246B	£-2.65B ®	£-1.25B	£-1.6B
3:30 PM	GB	Mortgage Lending FEB	£6.2B	£5.3B ®	£5B	£5.0B
3:30 PM	GB	Mortgage Approvals FEB	87.7K	97.35K ®	95K	94.9K
3:30 PM	GB	Net Lending to Individuals MoM FEB	£4.9B	£2.6B ®		£2.7B
9:30 PM	US	Dallas Fed Manufacturing Index MAR	28.9	17.2		18
10:00 PM	US	Fed Waller Speech				
10:30 PM	US	3-Month Bill Auction	0.020%	0.015%		
10:30 PM	US	6-Month Bill Auction	0.040%	0.040%		
Tuesday March 30 2021			Actual	Previous	Consensus	Forecast
4:00 PM	EA	Economic Sentiment MAR		93.4	96	96.3
4:00 PM	EA	Consumer Confidence Final MAR		-14.8	-10.8	-10.8
4:00 PM	EA	Consumer Inflation Expectations MAR		15.7		17
4:00 PM	EA	Industrial Sentiment MAR		-3.3	0	-0.6
4:00 PM	EA	Services Sentiment MAR		-17.1	-14.4	-14
7:55 PM	US	Redbook MoM 27/MAR		-17.6%		
7:55 PM	US	Redbook YoY 27/MAR		9.4%		
8:00 PM	US	S&P/Case-Shiller Home Price YoY JAN		10.1%	11%	10.4%
8:00 PM	US	S&P/Case-Shiller Home Price MoM JAN		0.8%		0.6%
8:00 PM	US	Fed Quarles Speech				
8:00 PM	US	House Price Index MoM JAN		1.1%		1.2%
8:00 PM	US	House Price Index YoY JAN		11.4%		11.7%
9:00 PM	US	CB Consumer Confidence MAR		91.3	96.9	96.5
10:30 PM	US	119-Day Bill Auction		0.030%		
10:30 PM	US	42-Day Bill Auction		0.010%		
11:00 PM	US	Fed Bostic Speech				
Wednesday March 31 2021			Actual	Previous	Consensus	Forecast
1:00 AM	US	Fed Williams Speech				
3:30 AM	US	API Crude Oil Stock Change 26/MAR		2.927M		
	CN	NBS Manufacturing PMI MAR		50.6	51.2	51.1
8:00 AM	CN	Non Manufacturing PMI MAR		51.4		51.9
1:00 PM	GB	Current Account Q4		£-15.7B	£-34B	£-32B
1:00 PM	GB	GDP Growth Rate QoQ Final Q4		16%	1%	1%
1:00 PM	GB	GDP Growth Rate YoY Final Q4		-8.7%	-7.8%	-7.8%
1:00 PM	GB	Nationwide Housing Prices YoY MAR		6.9%	6.4%	6.2%
1:00 PM	GB	Nationwide Housing Prices MoM MAR		0.7%	0.4%	0.4%
1:00 PM	GB	Business Investment YoY Final Q4		-11.6%		-10.3%
1:00 PM	GB	Business Investment QoQ Final Q4		14.5%		1.3%
4:00 PM	EA	Core Inflation Rate YoY Flash MAR		1.1%	1.1%	1.1%
4:00 PM	EA	Inflation Rate YoY Flash MAR		0.9%	1.3%	1.2%
4:00 PM	EA	Inflation Rate MoM Flash MAR		0.2%		0.8%
6:00 PM	US	MBA Mortgage Applications 26/MAR		-2.5%		
6:00 PM	US	MBA 30-Year Mortgage Rate 26/MAR		3.36%		
7:15 PM	US	ADP Employment Change MAR		117K	550K	495K
8:45 PM	US	Chicago PMI MAR		59.5	60.7	59.8
9:00 PM	US	Pending Home Sales MoM FEB		-2.8%	-2.9%	-3.1%
9:00 PM	US	Pending Home Sales YoY FEB		13%		9.5%
9:30 PM	US	EIA Crude Oil Stocks Change 26/MAR		1.912M	0.4M	
9:30 PM	US	EIA Gasoline Stocks Change 26/MAR		0.203M	0.2M	
9:30 PM	US	EIA Cushing Crude Oil Stocks Change 26/MAR		-1.935M		
9:30 PM	US	EIA Crude Oil Imports Change 26/MAR		0.338M		
9:30 PM	US	EIA Refinery Crude Runs Change 26/MAR		0.956M		
9:30 PM	US	EIA Heating Oil Stocks Change 26/MAR		0.011M		
9:30 PM	US	EIA Distillate Stocks Change 26/MAR		3.806M	0.075M	
9:30 PM	US	EIA Gasoline Production Change 26/MAR		-0.3M		
9:30 PM	US	EIA Distillate Fuel Production Change 26/MAR		0.373M		
9:45 PM	US	Fed Bostic Speech				
11:00 PM	US	Quarterly Grain Stocks - Wheat MAR		1.674B	1.272B	
11:00 PM	US	Quarterly Grain Stocks - Corn MAR		11.322B	7.767B	
11:00 PM	US	Quarterly Grain Stocks - Soy MAR		2.933B	1.543B	
11:00 PM	US	Prospective Plantings - Soy 2021		83.510M	89.996M	
11:00 PM	US	Prospective Plantings - Corn 2021		96.990M	93.208M	
11:00 PM	US	Prospective Plantings - Wheat 2021		44.655M	44.971M	
11:00 PM	US	Prospective Plantings - Cotton 2021		13.703M		
11:00 PM	US	USDA Prospective Plantings Report				
	US	President Biden Speech on Recovery Package				
Thursday April 01 2021			Actual	Previous	Consensus	Forecast
7:30 AM	ID	Markit Manufacturing PMI MAR		50.9		52
	CN	Caixin Manufacturing PMI MAR		50.9	51.3	51.2
11:00 AM	ID	Inflation Rate YoY MAR		1.38%		1.4%
11:00 AM	ID	Inflation Rate MoM MAR		0.1%		0.1%
11:00 AM	ID	Tourist Arrivals YoY FEB		-89.05%		-90%
11:00 AM	ID	Core Inflation Rate YoY MAR		1.53%		1.5%
3:00 PM	EA	Markit Manufacturing PMI Final MAR		57.9	62.4	62.4
3:30 PM	GB	Markit/CIPS Manufacturing PMI Final MAR		55.1	57.9	57.9

6:30 PM	US	<u>Challenger Job Cuts MAR</u>		34.531K		30K
7:30 PM	US	<u>Jobless Claims 4-week Average MAR/27</u>		736K		710K
7:30 PM	US	<u>Initial Jobless Claims 27/MAR</u>		684K	680K	650K
7:30 PM	US	<u>Continuing Jobless Claims 20/MAR</u>		3870K	3775K	3680K
8:45 PM	US	<u>Markit Manufacturing PMI Final MAR</u>		58.6	59	59
9:00 PM	US	<u>Construction Spending MoM FEB</u>		1.7%	-1%	-0.6%
9:00 PM	US	<u>ISM Manufacturing PMI MAR</u>		60.8	61.3	61.2
9:00 PM	US	<u>ISM Manufacturing New Orders MAR</u>		64.8		64
9:00 PM	US	<u>ISM Manufacturing Prices MAR</u>		86	85	84
9:00 PM	US	<u>ISM Manufacturing Employment MAR</u>		54.4		56
9:30 PM	US	<u>EIA Natural Gas Stocks Change 26/MAR</u>		-36Bcf	-25Bcf	
10:30 PM	US	8-Week Bill Auction		0.020%		
10:30 PM	US	4-Week Bill Auction		0.015%		
Friday April 02 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	<u>Fed Harker Speech</u>				
12:00 AM	US	<u>Baker Hughes Total Rig Count 01/APR</u>		417		
12:00 AM	US	<u>Baker Hughes Oil Rig Count 01/APR</u>		324		
5:05 AM	US	<u>Fed Kaplan Speech</u>				
7:00 AM	US	<u>Total Vehicle Sales MAR</u>		15.7M		16M
	US	<u>Non Farm Payrolls MAR</u>		379K	655K	680K
7:30 PM	US	<u>Unemployment Rate MAR</u>		6.2%	6%	6%
7:30 PM	US	<u>Manufacturing Payrolls MAR</u>		21K	33K	35K
7:30 PM	US	<u>Participation Rate MAR</u>		61.4%		61.7%
7:30 PM	US	<u>Average Hourly Earnings YoY MAR</u>		5.3%	4.5%	4.7%
7:30 PM	US	<u>Average Weekly Hours MAR</u>		34.6	34.7	34.8
7:30 PM	US	<u>Government Payrolls MAR</u>		-86K		225K
7:30 PM	US	<u>Nonfarm Payrolls Private MAR</u>		465K	443K	455K
7:30 PM	US	<u>Average Hourly Earnings MoM MAR</u>		0.2%	0.1%	0.2%
8:45 PM	US	<u>ISM New York Index MAR</u>		35.5		47
10:00 PM	US	<u>Fed Bostic Speech</u>				
7:30 PM	US	<u>Corporate Profits QoQ Q4</u>	-3.30%	27%		2%
7:30 PM	US	<u>GDP Price Index QoQ Final Q4</u>	1.90%	3.70%	2%	2%
7:30 PM	US	<u>GDP Growth Rate QoQ Final Q4</u>	4.30%	33.40%	4.10%	4.10%
7:30 PM	US	<u>Jobless Claims 4-week Average MAR/20</u>	736K	749K ®		736K
7:30 PM	US	<u>Initial Jobless Claims 20/MAR</u>	684K	781K ®	730K	695K
7:30 PM	US	<u>Continuing Jobless Claims 13/MAR</u>	3870K	4134K ®	4043K	4015K
7:30 PM	US	<u>PCE Prices QoQ Final Q4</u>	1.50%	3.70%	1.50%	1.60%
7:30 PM	US	<u>Core PCE Prices QoQ Final Q4</u>	1.30%	3.40%	1.40%	2.30%
9:10 PM	US	<u>Fed Clarida Speech</u>				
9:30 PM	US	<u>EIA Natural Gas Stocks Change 19/MAR</u>	-36Bcf	-11Bcf	-25Bcf	
10:00 PM	US	<u>Kansas Fed Manufacturing Index MAR</u>	23	26	24	26
10:15 PM	DE	<u>Bundesbank Balz Speech</u>				
10:30 PM	US	8-Week Bill Auction	0.02%	0.01%		
10:30 PM	US	4-Week Bill Auction	0.02%	0.01%		
	EU	European Council Meeting				
Friday March 26 2021			Actual	Previous	Consensus	Forecast
12:00 AM	US	7-Year Note Auction	1.30%	1.20%		
12:15 AM	US	President Biden Formal Press Conference				
2:00 PM	GB	Retail Sales MoM FEB		-8.20%	2.10%	2.50%
2:00 PM	GB	Retail Sales YoY FEB		-5.90%	-3.50%	-3.80%
2:00 PM	GB	Retail Sales ex Fuel MoM FEB		-8.80%	1.90%	5.10%
2:00 PM	GB	Retail Sales ex Fuel YoY FEB		-3.80%	-1.50%	-2%
	DE	Ifo Business Climate MAR		92.4	93.2	94
4:00 PM	DE	Ifo Expectations MAR		94.2	95	95.9
4:00 PM	DE	Ifo Current Conditions MAR		90.6	91.3	91.5
4:00 PM	GB	Car Production YoY FEB		-27.30%		-34%
7:00 PM	GB	BoE Saunders Speech				
7:10 PM	DE	Bundesbank Mauderer Speech				
	US	Personal Spending MoM FEB		2.40%	-0.70%	-0.70%
	US	Personal Income MoM FEB		10%	-7.30%	-8%
7:30 PM	US	PCE Price Index MoM FEB		0.30%		0.40%
7:30 PM	US	PCE Price Index YoY FEB		1.50%		1.70%
7:30 PM	US	Goods Trade Balance Adv FEB		\$-83.74B		\$-83B
7:30 PM	US	Wholesale Inventories MoM Adv FEB		1.30%		0.80%
7:30 PM	US	Core PCE Price Index MoM FEB		0.30%	0.10%	0.20%
7:30 PM	US	Core PCE Price Index YoY FEB		1.50%	1.50%	1.40%
9:00 PM	US	<u>Michigan Current Conditions Final MAR</u>		86.2		91.5
9:00 PM	US	<u>Michigan Consumer Expectations Final MAR</u>		70.7		77.5
9:00 PM	US	<u>Michigan 5 Year Inflation Expectations Final MAR</u>		2.70%		2.70%
9:00 PM	US	<u>Michigan Consumer Sentiment Final MAR</u>		76.8	83.6	83
9:00 PM	US	<u>Michigan Inflation Expectations Final MAR</u>		3.30%		3.10%
11:45 PM	GB	<u>BoE Tenreiro Speech</u>				
	EU	European Council Meeting				

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