

IHSG	6,144.9
Change %	1.71%
Net Foreign Buy (YTD)	18.51 T
Resistance	6180
Support	6100
Net F *Buy*	567.3M
F Buy	2989.M
D Buy	8064.M
F Sell	2422.M
D Sell	8632.M



Sumber : Tradingview, PT Erdikha Elit Sekuritas

Sectoral	Last	Change %
Basic Materials	1,163.77	↑ 2.39%
Consumer Cyclical	802.51	↑ 1.09%
Energy	752.87	↑ 1.75%
Financials	1,399.48	↑ 1.43%
Healthcare	1,346.56	↑ 1.87%
Industrials	997.52	↑ 3.41%
Infrastructures	932.91	↑ 2.45%
Consumer Non-Cyclical	666.08	↑ 1.85%
Properties & Real Estate	809.54	↑ 0.89%
Technology	10,810.13	↑ 0.42%
Transportation & Logistic	1,073.63	↑ 0.78%

*Data Update Pukul 15.30 WIB

Commodities	Last	Change %
Palm Oil	RM 4,254.00	↓ -1.82%
Crude Oil	\$ 69.08	↓ -0.19%
Nickel	\$ 18,920.00	↑ 0.66%
Gold	\$ 1,811.20	↑ 0.08%
Coal	\$ 171.35	↑ 0.23%

*Data Update Terakhir Pukul 07.42 WIB

Indeks	Close	Change %
Dow Jones Industrial	35,400	↓ -0.16%
S&P 500	4,529	↑ 0.43%
Nasdaq Composite	15,266	↑ 0.90%
FTSE 100 London	7,148	→ 0.00%
DAX Xetra Frankfurt	15,887	↑ 0.22%
Shanghai Composite	3,528	↑ 0.17%
Hangseng Index	25,540	↑ 0.52%
Nikkei 225 Osaka	27,789	↑ 0.54%

*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 pada level 6144. Ditransaksikan dengan volume yang relatif sepi jika dibandingkan dengan rata-rata volume 5 hari perdagangan. Indeks ditopang oleh sektor Basic Materials (2.388%), Consumer Cyclical (1.088%), Energy (1.753%), Financials (1.426%), Healthcare (1.873%), Industrials (3.412%), Infrastructures (2.454%), Consumer Non-Cyclical (1.853%), Properties & Real Estate (0.894%), Technology (0.418%), Transportation & Logistic (0.778%). Indeks pada hari ini diperkirakan akan bergerak pada range level support 6100 dan level resistance 6180.

Global Sentiment

Indeks pada perdagangan kemarin ditutup menguat pada level 6144. Penguatan indeks yang terjadi salah satunya dikarenakan adanya pernyataan The Fed terkait suku bunga acuannya bahwa tidak ada kenaikan suku bunga acuan tahun ini, selain kebijakan tapering (pengurangan pembelian obligasi di pasar sekunder). Dalam sambutannya di ajang Jackson Hole, simposium tahunan Federal Reserve (The Fed) yang dihadiri pejabat bank sentral dari seluruh dunia, Ketua The Fed, Jerome Powell menyatakan bahwa pembelian obligasi bulanan-senilai US\$ 120 miliar yang selama ini dijalankan-akan dikurangi sebelum tahun baru. Namun, lagi-lagi The Fed menegaskan bahwa kebijakan tapering tersebut, bakal dijalankan terpisah atau tidak bersamaan dengan kebijakan penaikan suku bunga acuan.

Kemudian selain dari hasil simposium The Fed akhir pekan lalu, pada hari Selasa ada beberapa indikator ekonomi yang perlu diperhatikan oleh para pelaku pasar diantaranya terkait rilisnya Non Manufacturing PMI bulan Agustus China yang duproyeksikan masih cendeurng stagnan di level 53. Kemudian dari Jerman akan rilis data tingkat pengangguran selama bulan Agustus yang diproyeksikan akan sedikit berkurang menjadi 5,6% dari sebelumnya 5,7%. Selain dari China dan US akan ada rilis terkait data house price index US secara bulanan dan tahunan selama bulan Juni yang diproyeksikan akan tumbuh 1,6% dari 1,7% secara bulanan dan 19% dari 18% secara tahunan. Lagi-lagi data indikator ekonomi US secara tahunan nampak tinggi, karna memang tahun lalu kontraksinya cukup dalam, sehingga wajar pertumbuhannya dibandingkan tahun ini cukup tinggi.

Kemudian pada sore hari setelah market tutup pemerintah kembali memperpanjang PPKM Level 4 dan 3 di Jawa dan Bali hingga 6 September 2021 meskipun angka kasus baru harian Covid-19 sudah berada dilevel 10.000 untuk data etrkahir tanggal 29 Agustus 2021. Dari alngkah ini, nampaknya pemerintah ingin lebih menekan kembali angka kasus harian tersebut dengan target seperti awal tahun 2021 yang Januari - Mei yang trennya cenderung stagnan namun dilevel yang cukup kecil, dibawah 10.000.

Daily Recommendation

Stock	Last Price	Recommendation	Target Price	Upside (%)	Stop Loss	Commentary
IMAS	1,055	Buy	1090 - 1160	3.3% - 10%	980	Huge volume accumulation
ASII	5,275	Speculative Buy	5350 - 5400	1.4% - 2.4%	5100	Huge volume accumulation
BBRI	3,940	Buy	4000 - 4090	1.5% - 3.8%	3890	Huge volume accumulation
ERAA	590	Speculative Buy	610 - 640	3.4% - 8.5%	550	Bullish Morubozu
ESSA	328	Buy on weakness	340 - 354	3.7% - 7.9%	318	Three Black Crows
			-			
			-			
			-			
			-			
			-			

Stock Watchlist

ECONOMIC CALENDAR

Sources: Trading Economics, Erdikha Research

Monday August 30 2021			Actual	Previous	Consensus	Forecast
4:00 PM	EA	<u>Economic Sentiment AUG</u>		119	117.9	118.1
4:00 PM	EA	<u>Consumer Confidence Final AUG</u>		-4.4	-5.3	-5.3
4:00 PM	EA	<u>Services Sentiment AUG</u>		19.3	18.8	18.8
4:00 PM	EA	<u>Consumer Inflation Expectations AUG</u>		30		28
4:00 PM	EA	<u>Industrial Sentiment AUG</u>		14.6	13.4	13.6
9:00 PM	US	<u>Pending Home Sales YoY JUL</u>		-1.90%		-2%
9:00 PM	US	<u>Pending Home Sales MoM JUL</u>		-1.90%	0.40%	1%
9:30 PM	US	<u>Dallas Fed Manufacturing Index AUG</u>		27.3		25
9:30 PM	US	<u>NY Fed Treasury Purchases 7.5 to 30 yrs</u>			\$1.225B	
10:30 PM	US	<u>3-Month Bill Auction</u>		0.06%		
10:30 PM	US	<u>6-Month Bill Auction</u>		0.05%		
Tuesday August 31 2021			Actual	Previous	Consensus	Forecast
	CN	<u>NBS Manufacturing PMI AUG</u>		50.4	50.2	50.3
8:00 AM	CN	<u>Non Manufacturing PMI AUG</u>		53.3		53
3:30 PM	GB	<u>BoE Consumer Credit JUL</u>		£0.3B	£0.421B	£0.5B
3:30 PM	GB	<u>Mortgage Approvals JUL</u>		81.3K	79K	79.1K
3:30 PM	GB	<u>Mortgage Lending JUL</u>		£17.9B	£3.1B	£3B
3:30 PM	GB	<u>Net Lending to Individuals MoM JUL</u>		£18.2B		£3.2B
4:00 PM	EA	<u>Core Inflation Rate YoY Flash AUG</u>		0.70%	1.50%	1.40%
4:00 PM	EA	<u>Inflation Rate YoY Flash AUG</u>		2.20%	2.80%	2.70%
4:00 PM	EA	<u>Inflation Rate MoM Flash AUG</u>		-0.10%		0.10%
7:55 PM	US	<u>Redbook YoY 28/AUG</u>		16.60%		
8:00 PM	US	<u>S&P/Case-Shiller Home Price MoM JUN</u>		2.10%		1.90%
8:00 PM	US	<u>S&P/Case-Shiller Home Price YoY JUN</u>		17%	18.60%	18%
8:00 PM	US	<u>House Price Index MoM JUN</u>		1.70%		1.60%
8:00 PM	US	<u>House Price Index YoY JUN</u>		18%		19%
8:45 PM	US	<u>Chicago PMI AUG</u>		73.4	68	69
9:00 PM	US	<u>CB Consumer Confidence AUG</u>		129.1	124	123
9:30 PM	US	<u>NY Fed Treasury Purchases 10 to 22.5 yrs</u>			\$1.425B	
10:30 PM	US	<u>21-Day Bill Auction</u>				
Wednesday September 01 2021			Actual	Previous	Consensus	Forecast
3:30 AM	US	<u>API Crude Oil Stock Change 27/AUG</u>		-1.622M		
7:30 AM	ID	<u>Markit Manufacturing PMI AUG</u>		40.1		41
	CN	<u>Caixin Manufacturing PMI AUG</u>		50.3	50.2	50.2
11:00 AM	ID	<u>Inflation Rate YoY AUG</u>		1.52%	1.60%	1.60%
11:00 AM	ID	<u>Tourist Arrivals YoY JUL</u>		-10.04%		-5%
11:00 AM	ID	<u>Inflation Rate MoM AUG</u>		0.08%	0.05%	0.10%
11:00 AM	ID	<u>Core Inflation Rate YoY AUG</u>		1.40%	1.30%	1.30%
1:00 PM	GB	<u>Nationwide Housing Prices YoY AUG</u>		10.50%	8.60%	8.90%
1:00 PM	GB	<u>Nationwide Housing Prices MoM AUG</u>		-0.50%	0.10%	0.30%
3:00 PM	EA	<u>Markit Manufacturing PMI Final AUG</u>		62.8	61.5	61.5
3:30 PM	GB	<u>Markit/CIPS Manufacturing PMI Final AUG</u>		60.4	60.1	60.1
4:00 PM	EA	<u>Unemployment Rate JUL</u>		7.70%	7.60%	7.60%
6:00 PM	US	<u>MBA 30-Year Mortgage Rate 27/AUG</u>		3.03%		
6:00 PM	US	<u>MBA Mortgage Applications 27/AUG</u>		1.60%		
7:15 PM	US	<u>ADP Employment Change AUG</u>		330K	638K	500K
8:45 PM	US	<u>Markit Manufacturing PMI Final AUG</u>		63.4	61.2	61.2
9:00 PM	US	<u>Construction Spending MoM JUL</u>		0.10%	0.30%	0.30%
9:00 PM	US	<u>ISM Manufacturing PMI AUG</u>		59.5	58.5	59
9:00 PM	US	<u>ISM Manufacturing New Orders AUG</u>		64.9		64
9:00 PM	US	<u>ISM Manufacturing Prices AUG</u>		85.7	84	85
9:00 PM	US	<u>ISM Manufacturing Employment AUG</u>		52.9		52.3
9:30 PM	US	<u>EIA Crude Oil Stocks Change 27/AUG</u>		-2.979M		
9:30 PM	US	<u>EIA Gasoline Stocks Change 27/AUG</u>		-2.242M		

9:30 PM	US	<u>EIA Crude Oil Imports Change 27/AUG</u>		0.426M		
9:30 PM	US	<u>EIA Cushing Crude Oil Stocks Change 27/AUG</u>		0.07M		
9:30 PM	US	<u>EIA Distillate Fuel Production Change 27/AUG</u>		0.14M		
9:30 PM	US	<u>EIA Distillate Stocks Change 27/AUG</u>		0.645M		
9:30 PM	US	<u>EIA Heating Oil Stocks Change 27/AUG</u>		-0.299M		
9:30 PM	US	<u>EIA Gasoline Production Change 27/AUG</u>		0.249M		
9:30 PM	US	<u>EIA Refinery Crude Runs Change 27/AUG</u>		0.066M		
10:20 PM	US	NY Fed Treasury Purchases 7 to 10 yrs			\$3.225B	
Thursday September 02 2021			Actual	Previous	Consensus Forecast	
7:00 AM	US	<u>Total Vehicle Sales AUG</u>		14.8M		
4:00 PM	EA	<u>PPI MoM JUL</u>		1.40%	1.20% 1.40%	
4:00 PM	EA	<u>PPI YoY JUL</u>		10.20%	10.90% 11%	
6:30 PM	US	<u>Challenger Job Cuts AUG</u>		18.942K	19K	
	US	<u>Balance of Trade JUL</u>		\$-75.7B	\$-70.9B \$-70B	
7:30 PM	US	<u>Unit Labour Costs QoQ Final Q2</u>		-2.80%	1% 1%	
7:30 PM	US	<u>Nonfarm Productivity QoQ Final Q2</u>		4.30%	2.40% 2.30%	
7:30 PM	US	<u>Initial Jobless Claims 28/AUG</u>		353K	345K 340K	
7:30 PM	US	<u>Jobless Claims 4-week Average AUG/28</u>		366.5K		354.75K
7:30 PM	US	<u>Continuing Jobless Claims 21/AUG</u>		2862K		2815K
7:30 PM	US	<u>Exports JUL</u>		\$207.7B		\$210.3B
7:30 PM	US	<u>Imports JUL</u>		\$283.4B		\$280.3B
9:00 PM	US	<u>Factory Orders MoM JUL</u>		1.50%	0.30% -0.20%	
9:00 PM	US	<u>Factory Orders ex Transportation JUL</u>		1.40%		0.50%
9:30 PM	US	<u>EIA Natural Gas Stocks Change 27/AUG</u>		29Bcf		
9:30 PM	US	NY Fed Treasury Purchases 22.5 to 30 yrs			\$2.025B	
10:30 PM	US	8-Week Bill Auction		0.06%		
10:30 PM	US	<u>4-Week Bill Auction</u>		0.04%		
	US	<u>LMI Logistics Managers Index Current</u>		74.5		
Friday September 03 2021			Actual	Previous	Consensus Forecast	
8:45 AM	CN	<u>Caixin Services PMI AUG</u>		54.9		54
8:45 AM	CN	<u>Caixin Composite PMI AUG</u>		53.1		52.9
3:00 PM	EA	<u>Markit Services PMI Final AUG</u>		59.8	59.7	59.7
3:00 PM	EA	<u>Markit Composite PMI Final AUG</u>		60.2	59.5	59.5
3:30 PM	GB	<u>Markit/CIPS UK Services PMI Final AUG</u>		59.6	55.5	55.5
3:30 PM	GB	<u>Markit/CIPS Composite PMI Final AUG</u>		59.2	55.4	55.3
4:00 PM	EA	<u>Retail Sales YoY JUL</u>		5%	5.20%	5.50%
4:00 PM	EA	<u>Retail Sales MoM JUL</u>		1.50%	0.20%	0.20%
	US	<u>Non Farm Payrolls AUG</u>		943K	728K	650K
7:30 PM	US	<u>Unemployment Rate AUG</u>		5.40%	5.20%	5.30%
7:30 PM	US	<u>Nonfarm Payrolls Private AUG</u>		703K	610K	690K
7:30 PM	US	<u>Average Hourly Earnings MoM AUG</u>		0.40%	0.40%	0.40%
7:30 PM	US	<u>Participation Rate AUG</u>		61.70%		61.70%
7:30 PM	US	<u>Government Payrolls AUG</u>		240K		-40K
7:30 PM	US	<u>Manufacturing Payrolls AUG</u>		27K	28K	25K
7:30 PM	US	<u>Average Weekly Hours AUG</u>		34.8	34.8	34.8
7:30 PM	US	<u>Average Hourly Earnings YoY AUG</u>		4%	4%	4%
8:45 PM	US	<u>Markit Services PMI Final AUG</u>		59.9	55.2	55.2
8:45 PM	US	<u>Markit Composite PMI Final AUG</u>		59.9	55.4	55.4
9:00 PM	US	<u>ISM Non-Manufacturing PMI AUG</u>		64.1	61.8	61.5
9:00 PM	US	<u>ISM Non-Manufacturing Business Activity AUG</u>		67	62.5	
9:00 PM	US	<u>ISM Non-Manufacturing Prices AUG</u>		82.3		
9:00 PM	US	<u>ISM Non-Manufacturing New Orders AUG</u>		63.7		
9:00 PM	US	<u>ISM Non-Manufacturing Employment AUG</u>		53.8		

Research Division

Hendri Widianoro	Research Analyst Coordinator	hendri.widianoro@erdikha.com	021 3983 6420	ext (2201)
Ivan Kasulthan	Research Analyst	ivan.kasulthan@erdikha.com	021 3983 6420	ext (2202)
Regina Fawziah	Associate Research Analyst	regina.fawziah@erdikha.com	021 3983 6420	ext (2202)

Retail & Corporation Equity Sales Division

Billy Pebriyanto	Head of Sales, Trading & Dealing	bps@erdikha.com	021 3983 6420	ext (3723)
Yuyun Adi Pambudi	Retail Equity Sales	yuyun.adi@erdikha.com	021 3983 6420	ext (3717)
Eni Martuti	Retail Equity Sales	eni.martuti@erdikha.com	021 3983 6420	ext (3715)
Indrawati	Retail Equity Sales	indrawati.yamani@erdikha.com	021 3983 6420	ext (3714)
Reandy Taqwa Andriyono	Retail Equity Sales	reandy.andriono@erdikha.com	021 3983 6420	ext (3716)
Susi Lestari	Retail Equity Sales	susi_l@erdikha.com	021 3983 6420	ext (3721)
Ulfa Rizky Aullia	Retail Equity Sales	ulfa.aullia@erdikha.com	021 3983 6420	ext (3719)
Winar Estrada	Corporate Equity Sales	winar.estrada@erdikha.com	021 3983 6420	ext (3720)
Dominggus Parera	Corporate Equity Sales	domi.parera@erdikha.com	021 3983 6420	ext (3823)

Online Trading

Henry Luhur	Head of Online Trading (AOnline)	henry@erdikha.com	021 3983 6420	ext (3925)
Chikal Galih Kresnawan	AOnline Customer Support	galih.kresnawan@erdikha.com	021 3983 6420	ext (3718)
Theresia Fransisca	AOnline Admin	theresia.fransisca@erdikha.com	021 3983 6420	ext (3315)

Fixed Income Sales & Trading

Dede Sumarjono	Fixed Income Sales	dede.sumarjono@erdikha.com	021 3983 6420	ext (3728)
Suraidah Lubis	Fixed Income Sales	aida.lubis@erdikha.com	021 3983 6420	ext (3725)

Investment Banking

Toto Sosiawanto	Head Of Investment Banking	toto@erdikha.com	021 3983 6420	ext (3828)
Halashon Tambunan	Investment Banking	halashon.tambunan@erdikha.com	021 3983 6420	ext (3314)
Hafidh Qarazia Barly	Investment Banking	hafidh.barly@erdikha.com	021 3983 6420	ext (3316)

Customer Service

Rowlinari Natalia N.	Customer Service	aofo.elit@erdikha.com	021 3983 6420	ext (3315)
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PT Erdikha Elit Sekuritas
Gedung Sucaco Lantai 3

Jl. Kebon Sirih Kav.71, RT.003/RW.002, Kelurahan Kebon Sirih, Kec. Menteng, Kota Administrasi Jakarta Pusat, Daerah Khusus Ibukota Jakarta 10340

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