

NISP Weekly Summary

27 September 2015

JCI Review

Selama sepekan lalu, IHSG melemah sebesar -170,881 poin atau -3,901% ke level 4209,439. Investor asing tercatat melakukan *nett sell (all board)* sebesar -2041,6 milyar dan *nett sell* -1655,1 milyar di pasar reguler.

Menutup perdagangan akhir pekan, indeks Dow Jones tercatat +0,70%, S&P -0,05%, Nasdaq -1,01%, Nikkei -1,76%, HSI +0,43%, STI -0,46%, DAX +2,77%, FTSE +2,47%, dan CAC-40 +3,07%.

Pada minggu lalu, China merilis data Caixin Flash Manufacturing PMI yang menurun ke 47,0 dari 47,3. Terbang ke Eropa, data French Flash Manufacturing PMI menunjukkan penguatan dari 48,4 ke 50,4. Sebaliknya, data German Flash Manufacturing PMI melemah dari 53,3 ke 52,5. Data Targeted LTRO lebih rendah daripada ekspektasi yaitu 15,5 milyar EUR berbanding ekspektasi 50,3 milyar EUR. Terbang ke Amerika, data Core Durable Goods Orders MoM melemah ke 0,0% dari level 0,4%. Di sisi lain, Final GDP QoQ-nya membaik dari 3,7% ke 3,9%.

Pada pekan ini, Indonesia akan merilis data inflasi MoM dan YoY periode September yang diprediksi menurun dari periode sebelumnya. China, Inggris, dan Amerika akan merilis data Manufacturing PMI. Tidak ketinggalan, Amerika akan merilis data Non-Farm Payroll pada hari Jumat.

Data Penjualan/Pembelian Asing Selama Sepekan

No	Pembelian Bersih Asing		Penjualan Bersih Asing	
	Ticker	Nilai (Milyar)	Ticker	Nilai (Milyar)
1	INCO	58,3	BBRI	-1010,7
2	ADHI	42,7	BBCA	-171,3
3	SRIL	33,9	BBNI	-146,5
4	AKRA	27,6	ASII	-89,7
5	MDLN	25,9	KLBF	-83,5
6	INDF	25,3	BMRI	-77,0
7	ASRI	21,1	UNVR	-71,4
8	GGRM	12,6	LPKR	-36,5

Nett foreign buy cenderung terjadi di sektor *property*. Sebaliknya, *nett foreign sell* terlihat banyak terjadi di sektor *finance*.



Hari ini dan esok hari, IHSG berpeluang untuk menguat terbatas menuju level 4260-4275. Hanya saja, IHSG memang perlu untuk turun lagi setidaknya ke level 4150 untuk menyelesaikan wave (iii) pada *daily chart*.

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Rating Definitions

Buy on Weakness (BoW) : We expect this stock could be bought below the last price.
Trading Buy : We expect this stock could be bought at the last price.
Sell on Strength (SoS) : We expect this stock could be sold above the last price.
Trading Sell : We expect this stock could be sold at the last price.

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