Dana asing banjiri lagi pasar Indonesia

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Sumber
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Sumber, PT Danareksa sekuritas

JAKARTA. Usai libur panjang Idul Fitri, wajah pasar finansial Indonesia ceria. Kemarin, Indeks Harga Saham Gabungan kemarin (11/7) menanjak 1,96% menjadi 5.069. Di saat yang sama, nilai tukar rupiah menguat 0,45% menjadi Rp 13.112 per dollar AS.

Sepanjang tahun ini, IHSG naik 10,36%. Kinerja indeks saham Indonesia terbaik kedua di kawasan Asia, di bawah indeks bursa Thailand. Di periode sama, rupiah menguat 5% terhadap dollar AS.

Para pemodal asing semakin yakin dengan prospek pasar Indonesia dan terus masuk Bursa Efek Indonesia. Sepanjang tahun ini, total net buy investor asing telah mencapai Rp 14,53 triliun. Sementara catatan Bank Indonesia (BI), total dana asing yang masuk Indonesia mencapai Rp 97 triliun sepanjang enam bulan terakhir "Nilai ini jauh di atas tahun lalu," kata Agus Martowardojo, Gubernur BI, kemarin.

Lucky Bayu Purnomo, Analis Danareksa Sekuritas, menilai, kecemasan pasar terkait koreksi harga minyak sudah berkurang. Iklim investasi Indonesia pun cenderung membaik didorong oleh sejumlah sentimen.

Mulai dari proyek infrastruktur pemerintah dan program pengampunan pajak (tax amnesty). Asing masih tertarik berinvestasi di pasar Tanah Air karena kebijakan pemerintah berpihak pada pasar alias market friendly. "Kebijakan Presiden Jokowi mulai ada titik terang terutama dari sektor infrastruktur," ujar Lucky.

Ia memprediksi, dana asing yang masuk masih berpotensi tumbuh 19% dari saat ini. Ekonom Bank Central Asia, David Sumual berharap beleid pengampunan pajak dapat diterapkan dan membawa aliran dana ke dalam negeri sehingga berpotensi memperkuat rupiah. Tapi ketidakpastian penerapan UU Tax Amnesty masih tinggi, apalagi muncul gugatan ke Mahkamah Konstitusi. "Ini bisa membawa sentimen negatif bagi rupiah," kata dia. David memprediksi, rupiah sampai akhir tahun berpeluang menguat, tapi tak signifikan. "BI tidak akan membiarkan rupiah terlalu menguat tajam, karena mengurangi daya saing Indonesia di pasar ekspor," tutur dia. Tresuri bank Eropa di Singapura melihat, penguatan rupiah lebih karena faktor teknikal. "Ada peluang ke Rp 12.900 di jangka pendek, tapi cuma sebentar. Di akhir tahun malah bisa Rp 13.600, jika ekonomi AS membaik," terangnya.

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