

Outline Presentation

Economic
Growth

Financial
Institution and
Capital Market
in Indonesia

Islamic Financial
Institution and
Capital Market

Islamic Finance
in Indonesia's
National
Account

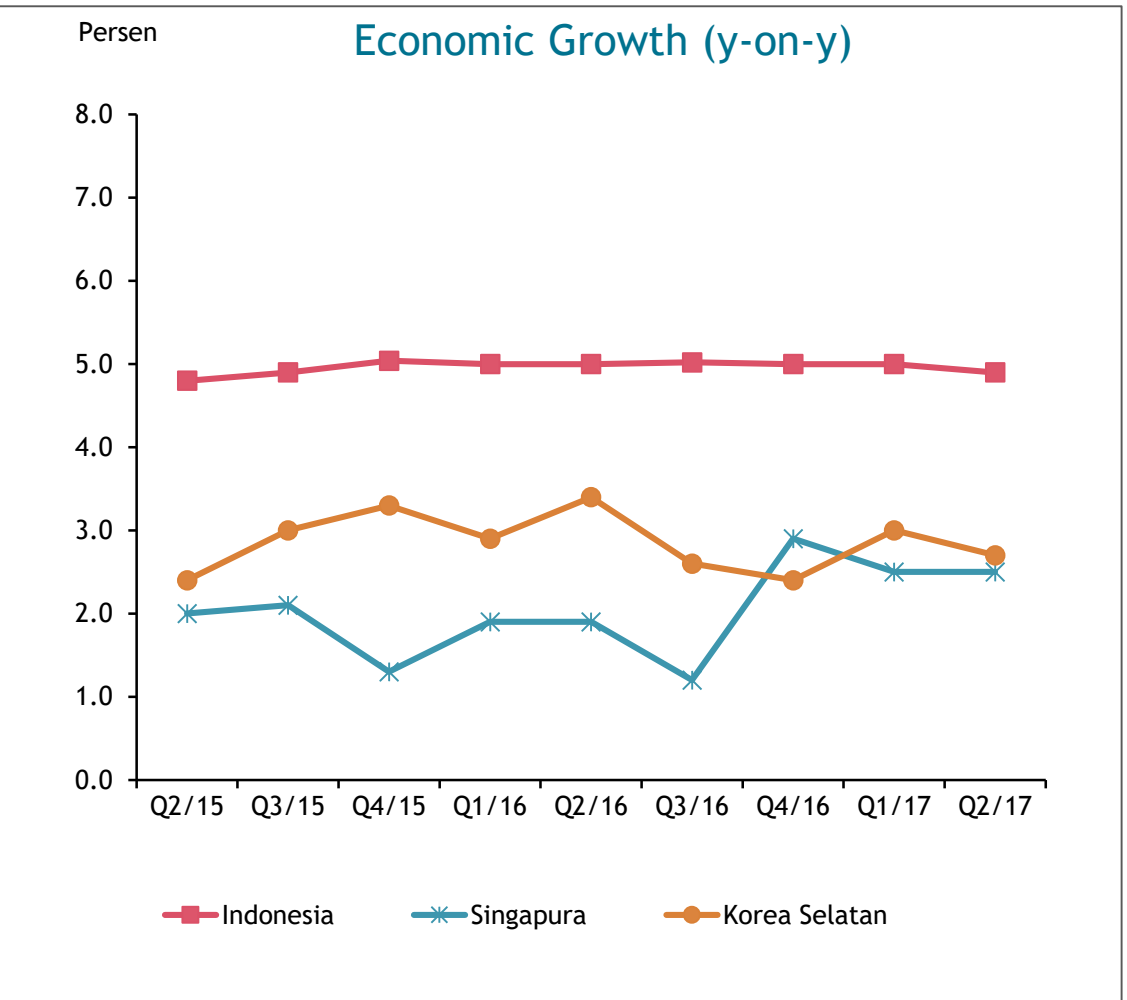
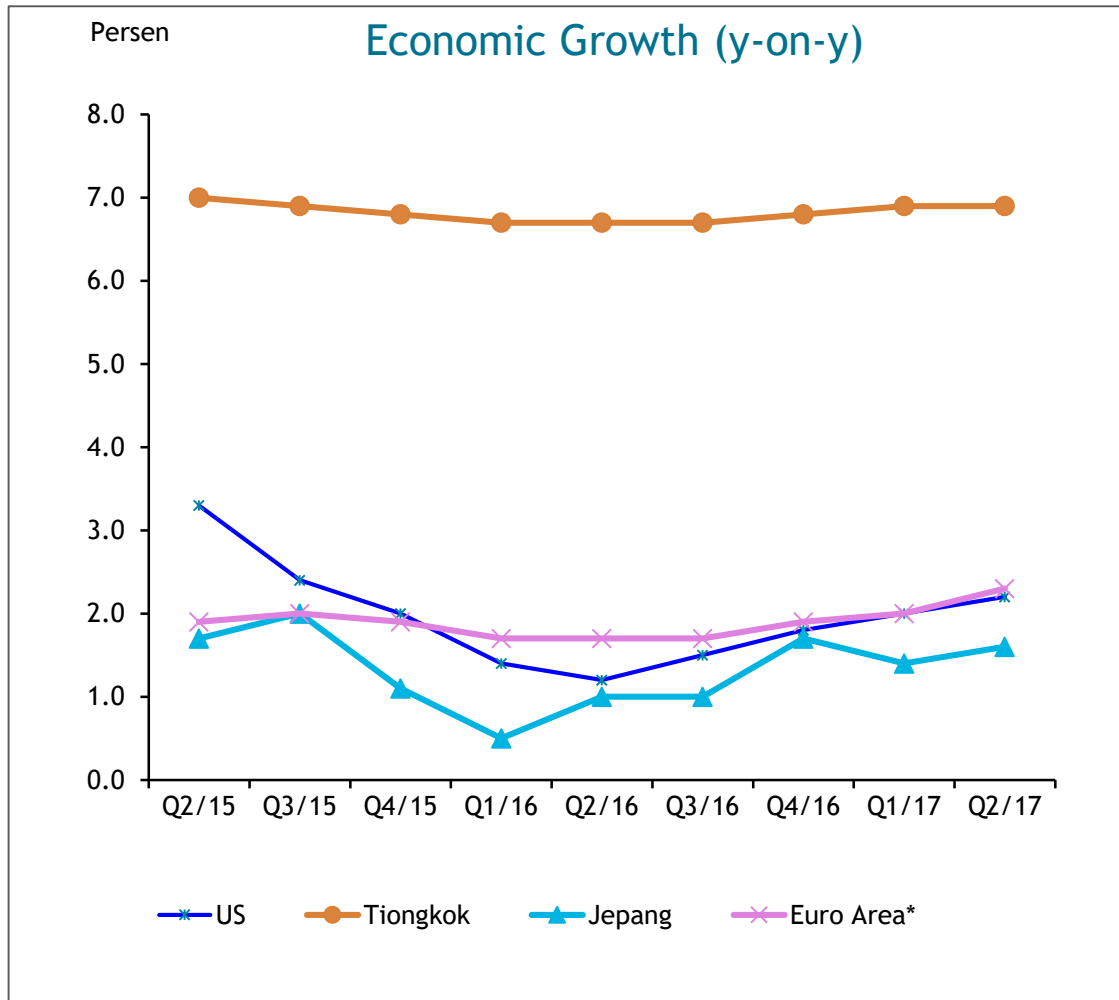


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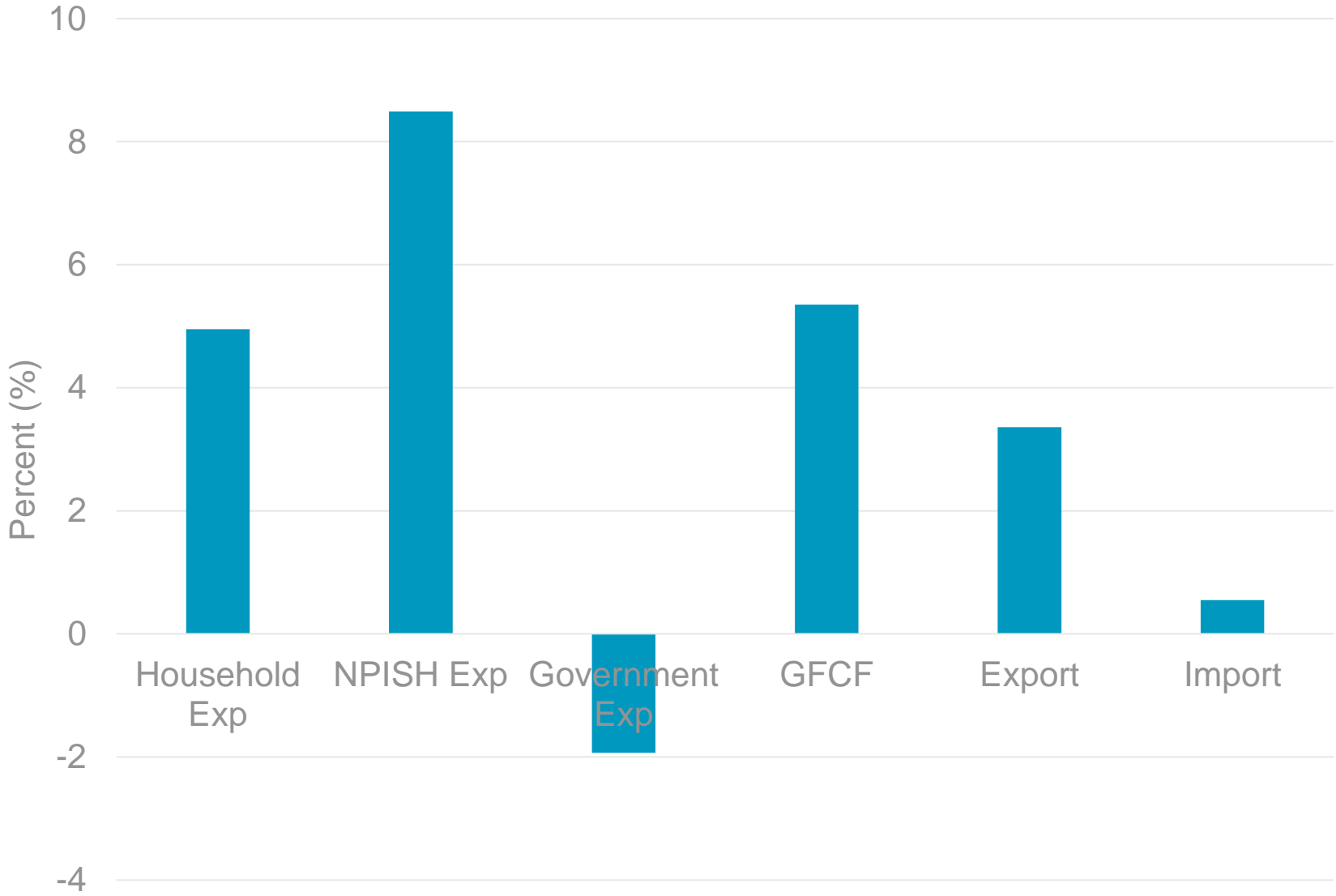
Pelopor
Data Statistik
Terpercaya
Untuk Semua

Economic Growth

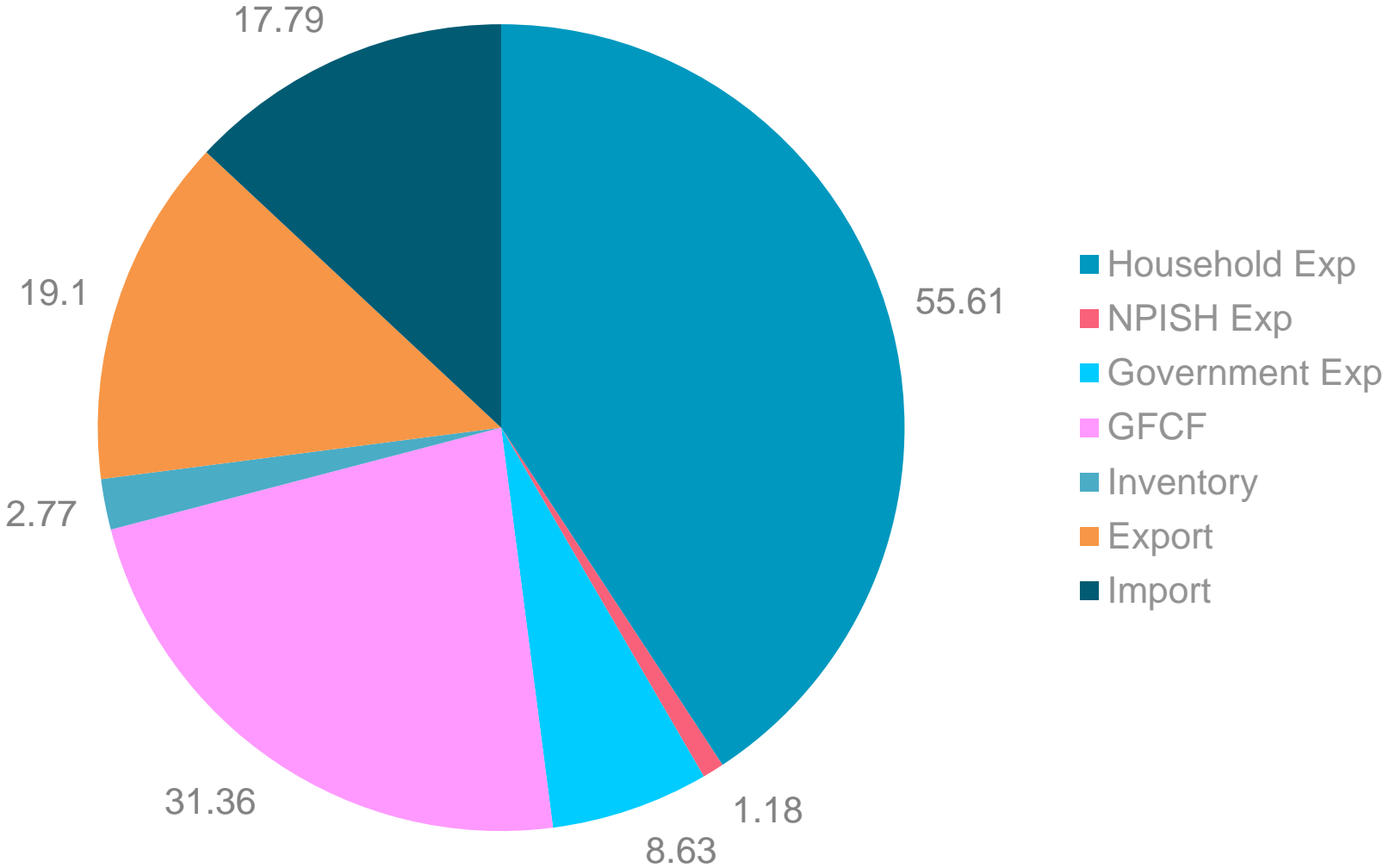
Indonesia and Global Economic Growth



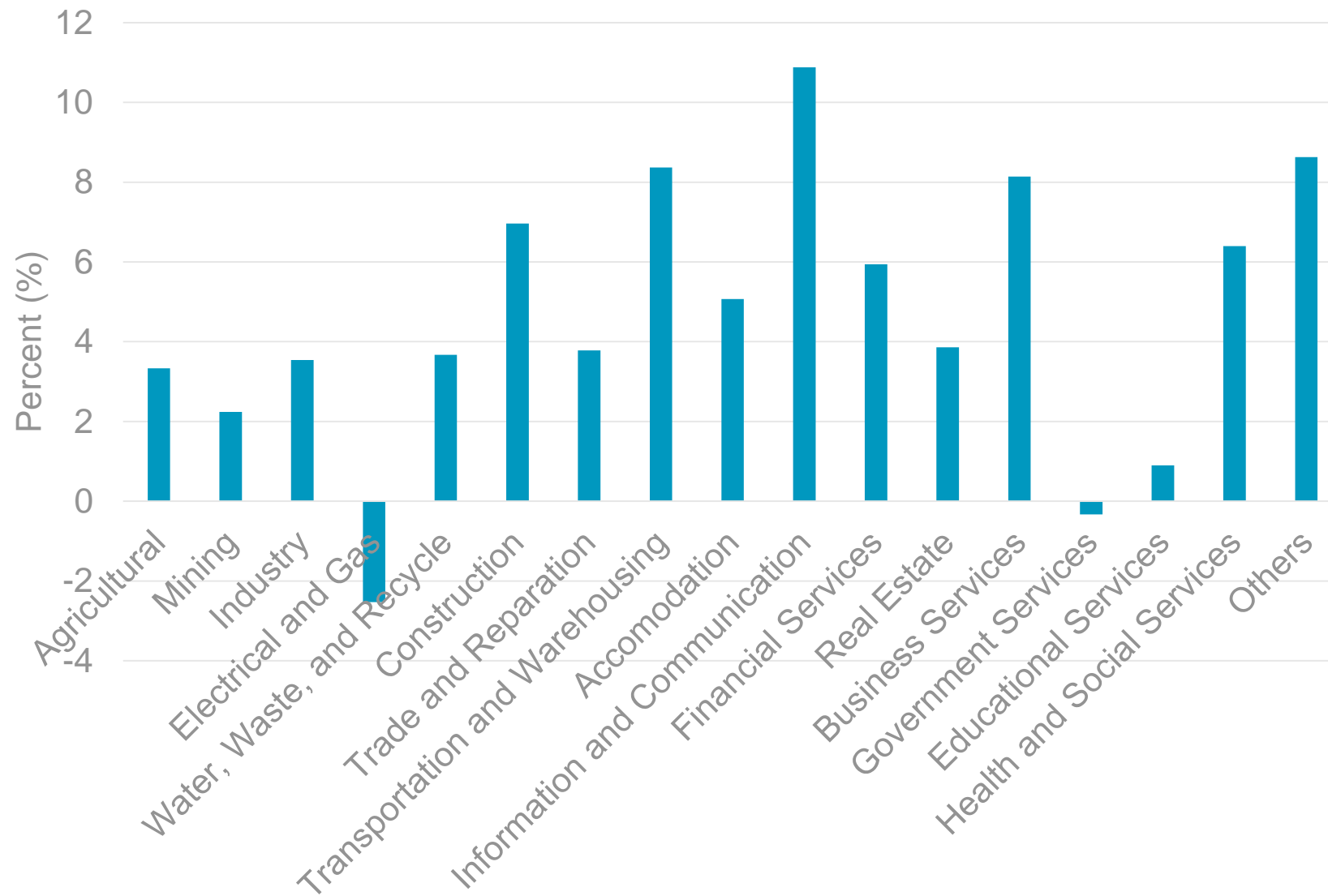
Indonesia GDP Growth by Expenditure on Q2-2017



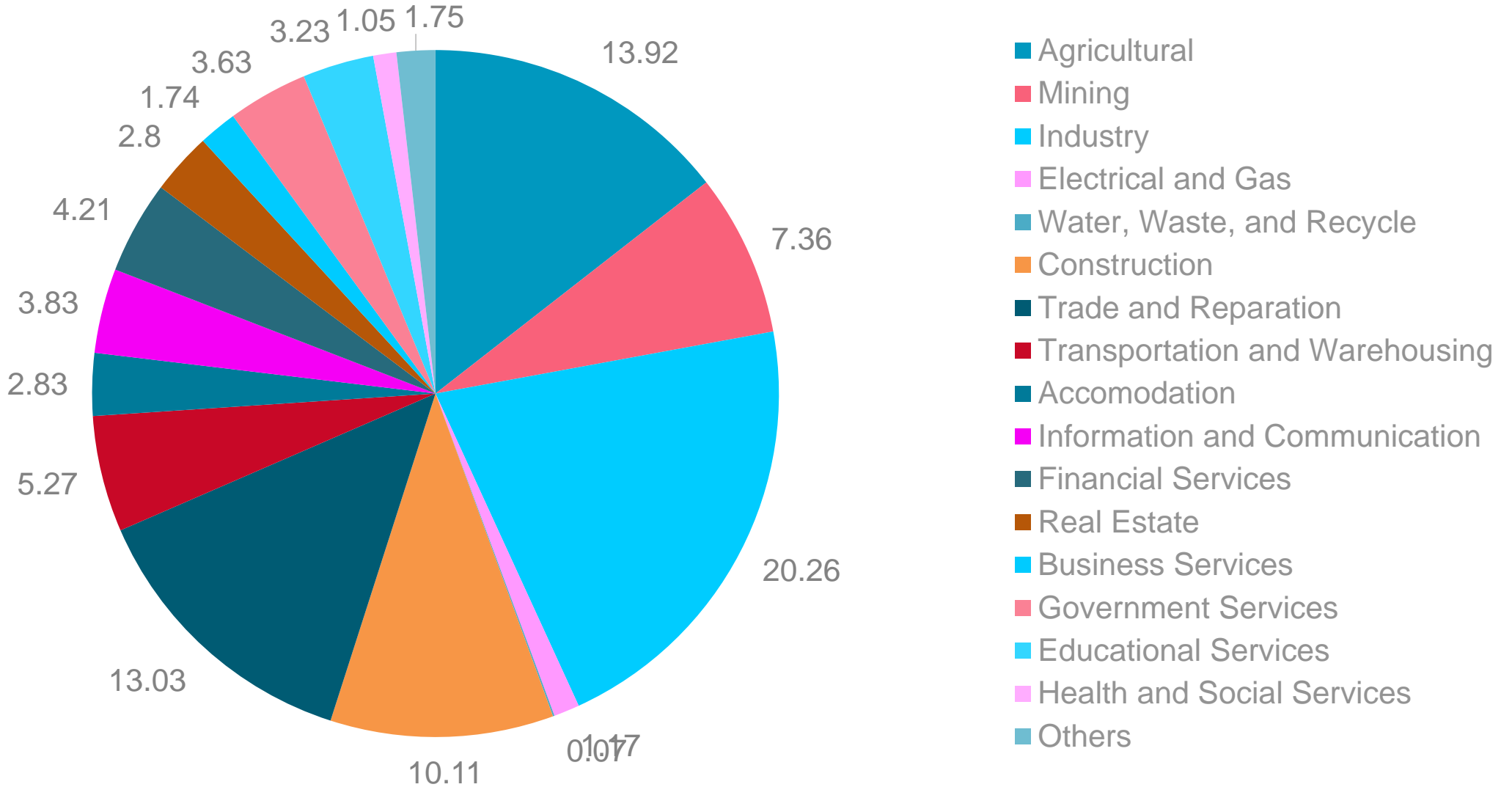
Distribution of GDP Expenditure on Q2-2017



Indonesia GDP Growth by Production on Q2-2017



Distribution of GDP Production on Q2-2017





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Financial Institution and Capital Market in Indonesia

General Conditions of Conventional Banks

Ratio	2012	2013	2014	2015	2016	y-on-y
Conventional Commercial Banks						
Total Assets (Rp billons)	4.115.003	4.773.892	5.410.098	5.919.390	6.475.602	9,40%
Credit (Rp billons)	2.597.026	3.158.099	3.526.364	3.903.936	4.199.713	7,58%
Deposits (Rp billons)	3.107.385	3.520.616	3.943.697	4.238.349	4.630.352	9,25%

Rural Bank Performance Indicators

Ratio	2012	2013	2014	2015	2016	y-on-y
Total Assets (Rp billions)	67.397	77.376	89.878	101.713	113.510	11,59%
Credit (Rp billions)	49.818	59.176	68.391	74.807	81.684	9,19%
Deposits (Rp billions)	44.870	50.520	58.750	67.266	75.725	12,58%

Stock Trading by Foreign and Domestic Investors

Indicator (Daily Average)	2014	2015	2016
Average Daily Value of Stock Trading (Rp billions)	6.005,75	5.763,78	7.498,32
Foreign Investors (Rp billions)			
Buy Value	2.524,86	2.443,97	2.798,75
Sell Value	2.348,84	2.536,55	2.733,02
Domestic Investors (Rp billion)			
Buy Value	3.480,89	3.319,81	4.699,58
Sell Value	3.656,92	3.227,23	5.765,30
Daily Stock Trading Frequency	212.635	221.583	264.127

Bond Trading Transaction

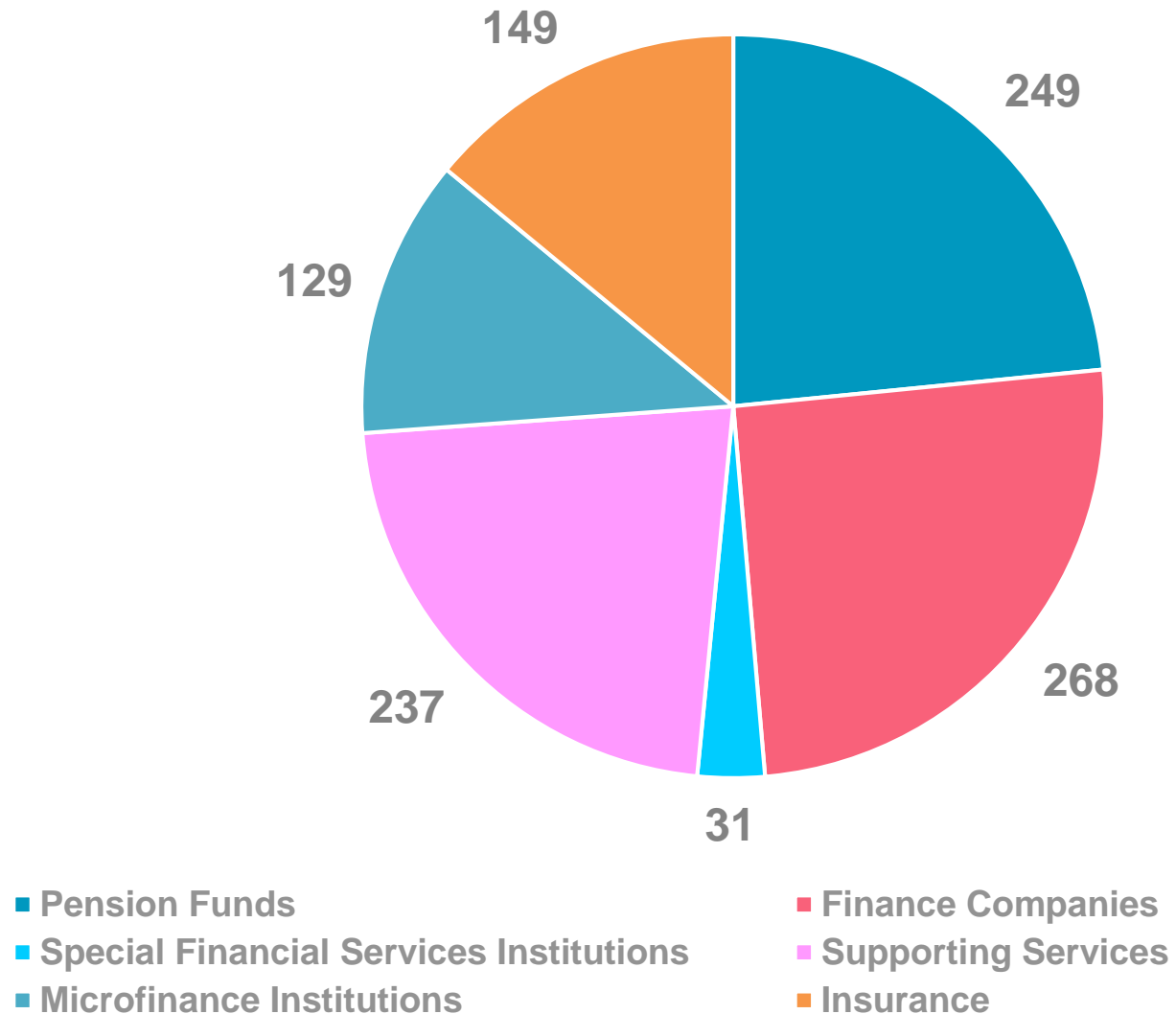
Transaction Type	2015		2016	
	Volume (Rp trillions)	Value (Rp trillions)	Volume (Rp trillions)	Value (Rp trillions)
Bonds				
▪ Corporate	187,66	186,05	224,30	225,14
▪ Government	3.399,94	3.401,12	3.653,30	3.749,57
Total	3.587,60	3.587,17	3.877,60	3.974,71
Repo	144,44	133,88	272,18	263,17

Non Banking Assets from 2012-2016 (Rp Triliun)

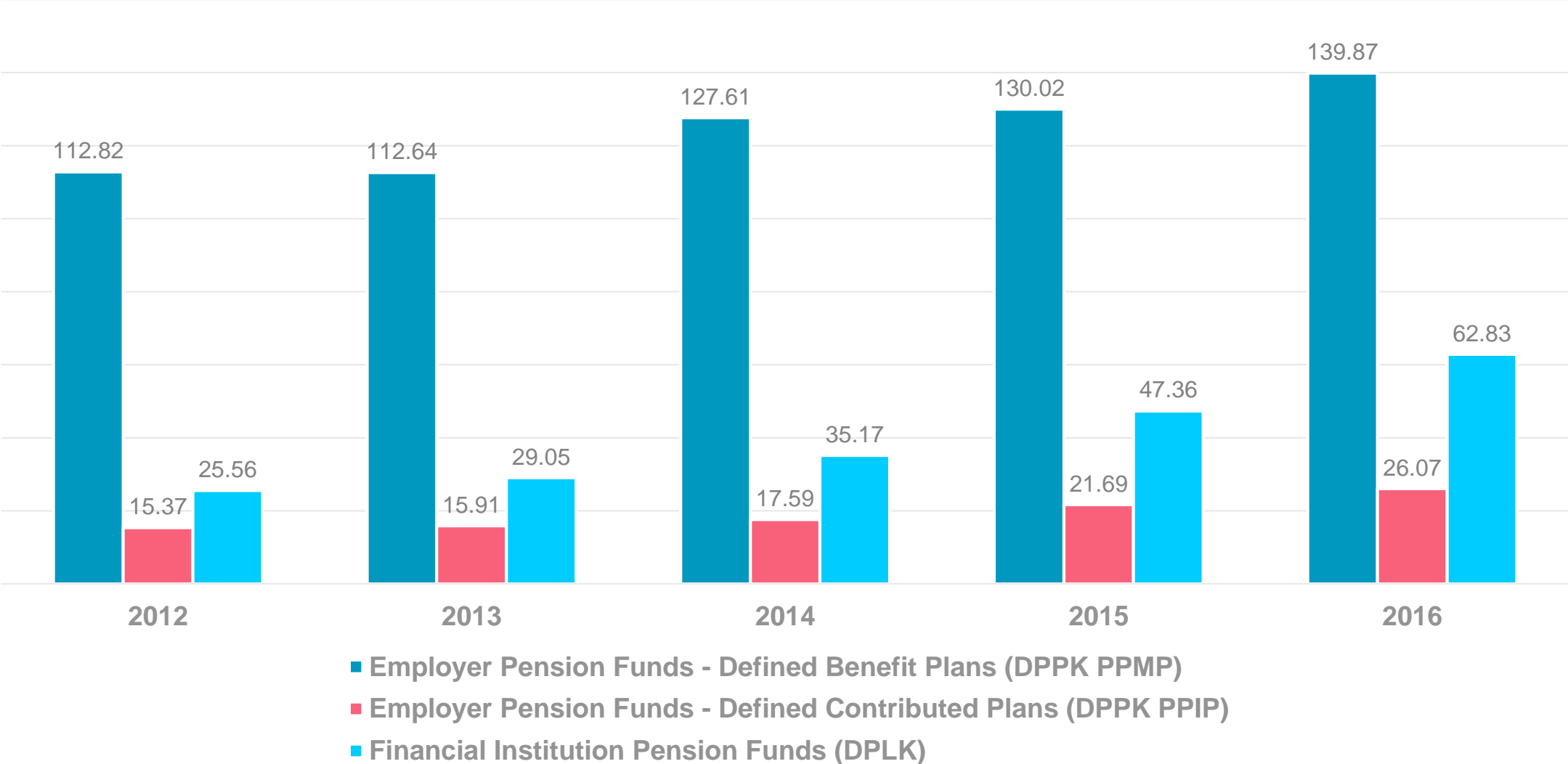
Industry	2012	2013	2014	2015	2016
Insurance	584,02	659,73	807,68	853,42	977,82
Pension Funds	158,37	162,44	187,52	206,59	238,30
Finance Companies	356,30	420,17	443,74	473,42	510,31
Special Financial Services Institutions	75,79	96,37	116,70	147,83	185,55
Supporting Services	3,49	4,29	5,42	6,04	7,25
Microfinance Institutions	-	-	-	0,05	0,28
Total Assets	1.177,97	1.343,00	1.561,06	1.687,35	1.919,51

Note: Based on unaudited financial data as of 31st December 2016

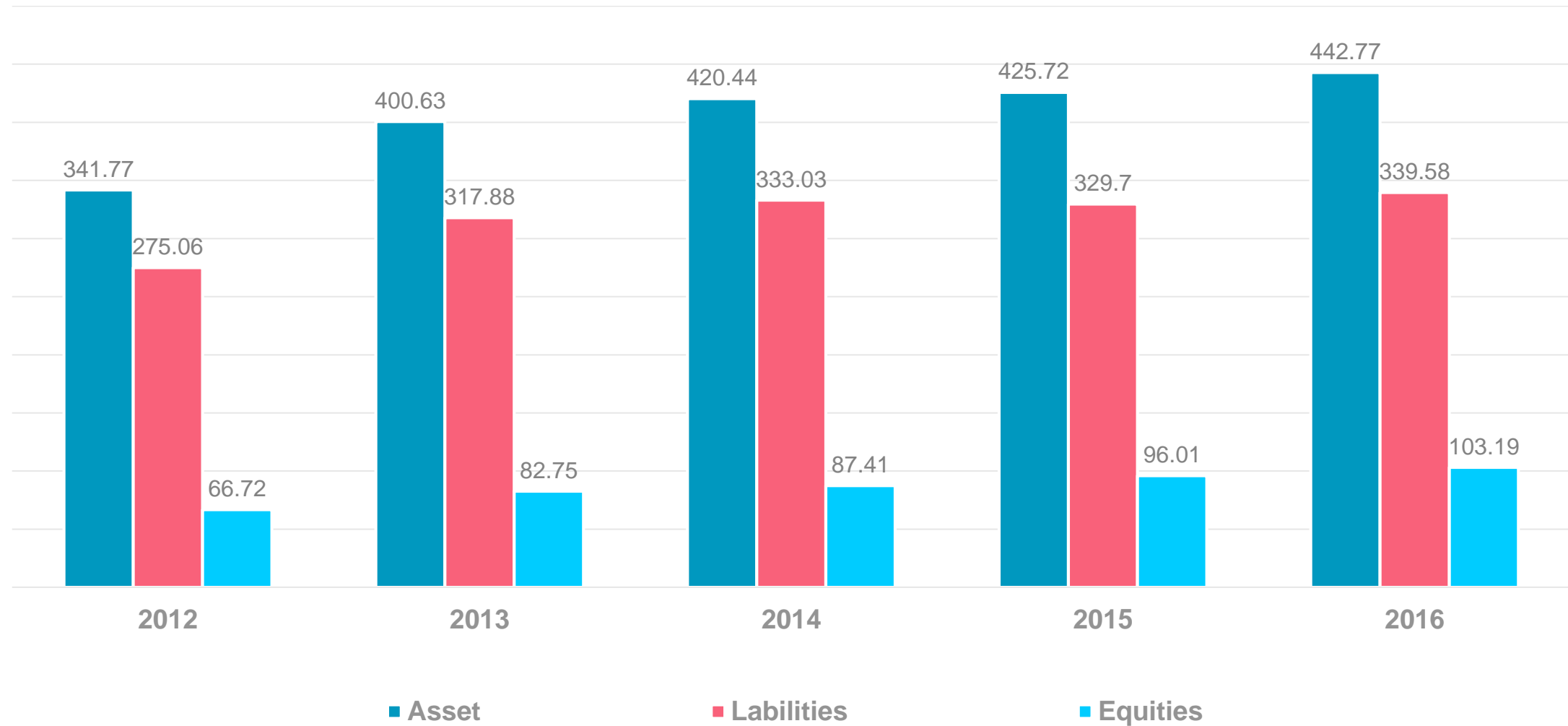
Number of Non Banking Institution at of 31st Dec 2016



Invest Distr of Pension Funds 2012-2016 (Rp trillion)



Assets, Liabilities, and Equity Growth of Finance Companies (Rp trillion)



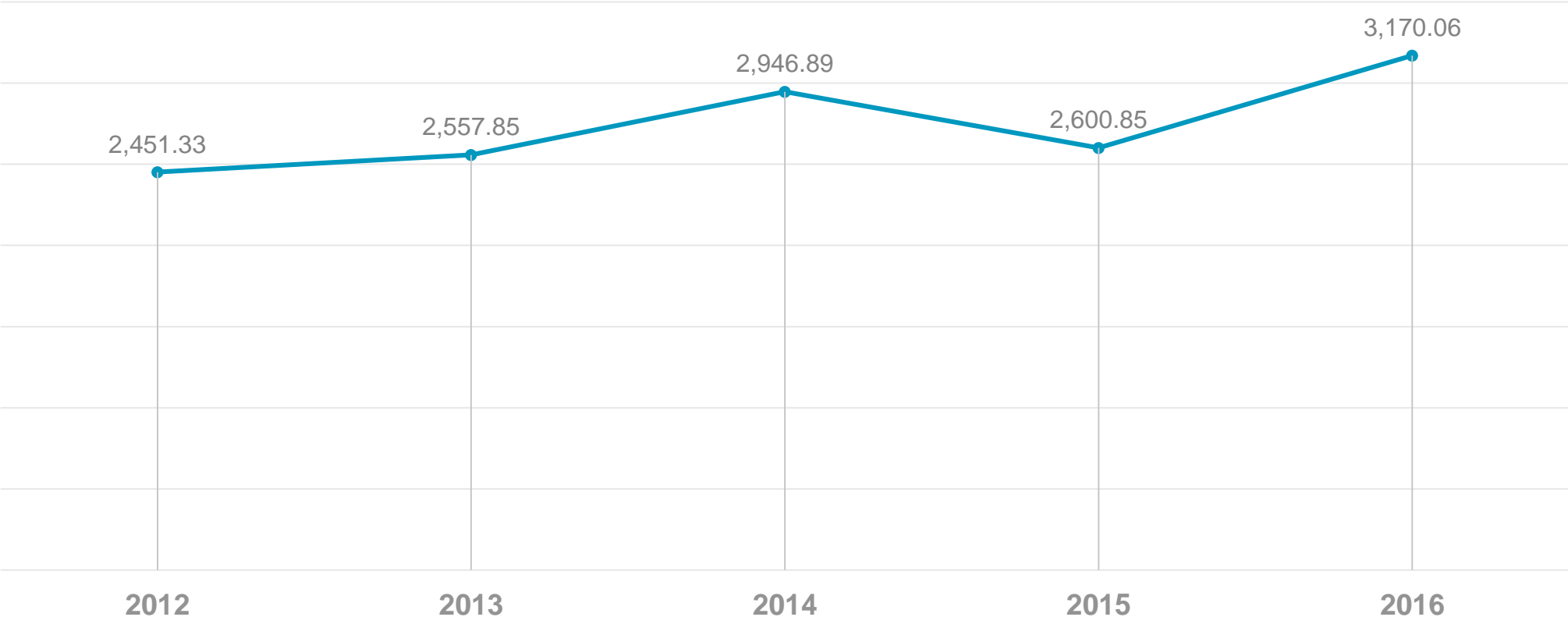


Islamic Financial Institution and Capital Market

Sharia Banking Indicators

Main Indicator	Q4-2015	Q1-2016	Q2-2016	Q3-2016	Q4-2016	Growth (y-on-y)	
						Value	%
Total Assets of Sharia Banks + Sharia Business Units (Rp trillions)	296,26	297,77	306,22	331,76	356,50	60,24	20,33
Total Assets of Sharia Rural Banks (Rp trillions)	7,74	7,95	8,12	8,60	9,16	1,42	18,33
Share of Sharia Bank + Rural Banks) to Total Assets of National Banking Industry	4,87	4,87	4,85	5,17	5,32		0,47

Indonesia Sharia Stock Market Capitalization (Rp trillion)



Corporate Sukuk Issuances

Year	Sukuk Issuance		Outstanding Sukuk	
	Total Value (Rp billions)	Total	Total Value (Rp billions)	Total
2010	7.815	47	6.121	32
2011	7.915	48	5.876	31
2012	9.790	54	6.883	32
2013	11.994	64	7.553	36
2014	12.956	71	7.105	35
2015	16.114	87	9.902	47
2016	20.425	102	11.878	53

Sharia Investment Funds Performance

Year	Sukuk Issuance				Outstanding Sukuk			
	Sharia Investment Funds	Conventional Investment Funds	Total Investment Funds	%	Sharia Investment Funds	Conventional Investment Funds	Total Investment Funds	%
2011	50	596	646	7,74%	5.564,79	162.672,10	168.236,89	3,13%
2012	58	696	754	7,69%	8.050,07	204.541,97	212.592,04	3,79%
2013	65	758	823	7,90%	9.432,19	183.112,33	192.544,52	4,90%
2014	74	820	894	8,31%	11.236,00	230.225,59	241.462,09	4,65%
2015	93	998	1.091	8,52%	11.019,43	260.949,57	271.969,00	4,05%
2016	136	1.289	1.425	9,54%	14.914,63	323.835,18	338.749,81	4,40%

Outstanding Government Islamic Securities (SBSN) Performance

Year	Value Outstanding	Total Outstanding
2010	44,34	16
2011	77,73	22
2012	124,44	36
2013	169,29	42
2014	206,10	42
2015	296,07	47
2016	411,37	53

Sharia Nonbank Financial Industry Asset Growth from 2012-2016

(Rp Billion)

Industry	2012	2013	2014	2015	2016
Sharia Insurance Companies	13.239,00	16.674,55	21.742,13	25.399,08	33.243,51
Sharia Finance Companies	22.664,34	24.638,98	23.767,63	22.530,38	35.740,95
Sharia Venture Capital Firms	225,29	311,16	384,18	414,33	1.092,47
Sharia Infrastructure Financing Companies	-	-	-	-	104,54
Sharia Guarantee Companies/Sharia Special Financial Institutions	-	102,84	376,89	618,29	18.428,99
Sharia Micro-Finance Institutions	-	-	-	-	63.435
Total	36.128,63	41.700,63	46.270,83	48.782,09	88.673,91

Number of Sharia Insurance Companies from 2012-2016

Industry	2012	2013	2014	2015	2016
Sharia Life Insurance Companies	3	3	3	5	6
Life Insurance Companies with a Sharia Business Unit	17	17	18	19	21
Sharia General Insurance Companies	2	2	2	3	4
General Insurance Companies with a Sharia Business Unit	20	24	23	25	24
Sharia Reinsurance Company	-	-	-	-	1
Sharia Reinsurance Company with a Sharia Business Unit	3	3	3	3	2
Total	45	49	49	55	58

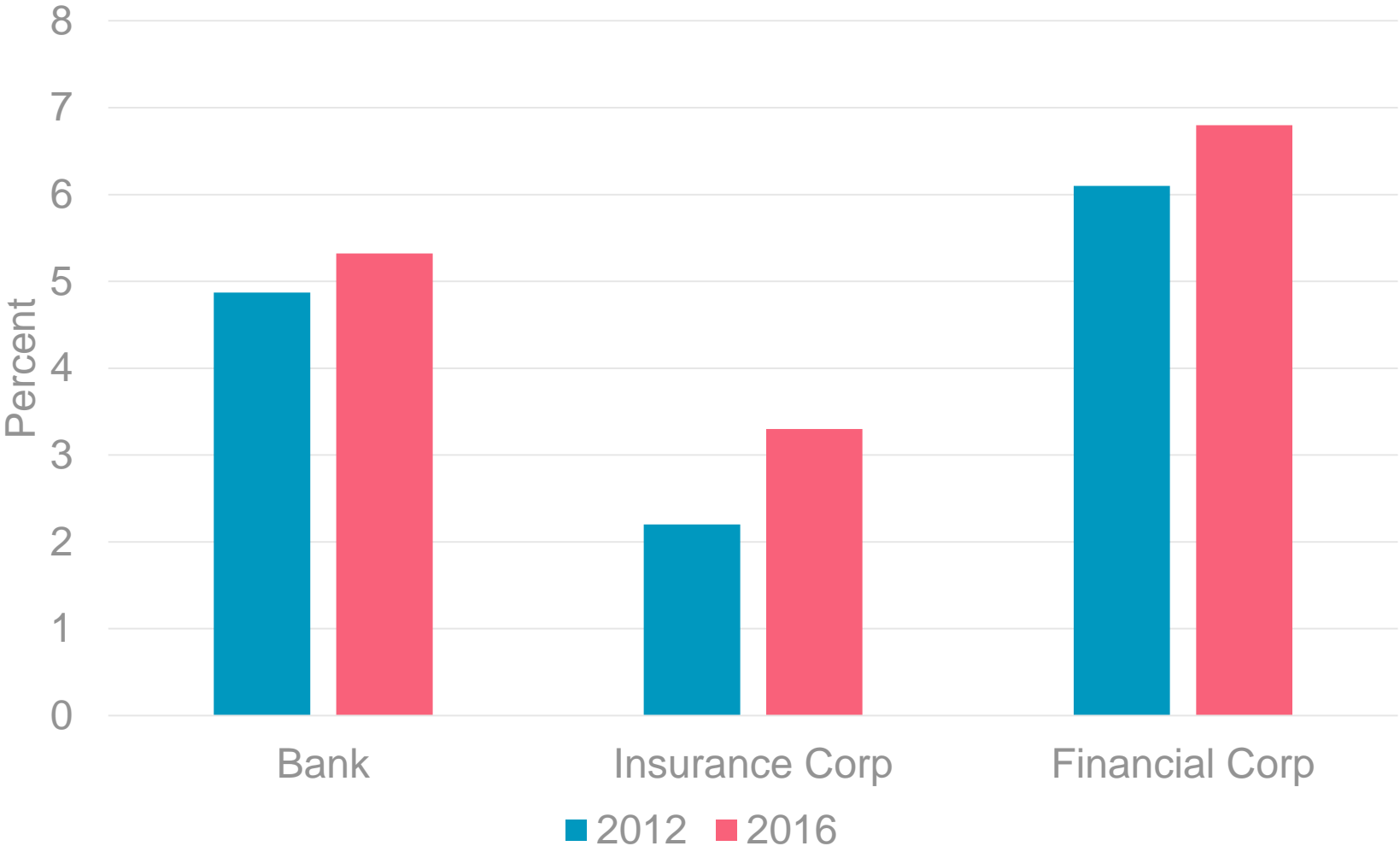
Number of Sharia Finance Companies from 2012-2016

Industry	2012	2013	2014	2015	2016
Sharia Finance Companies	2	2	3	3	3
Finance Companies with a Sharia Business Unit	32	42	41	37	38
Sharia Venture Capital Firm	-	4	4	4	4
Venture Capital Firm with a Sharia Business Unit	-	-	-	2	3
Sharia Infrastructure Finance Company; Infrastructure Finance Company with a Sharia Business Unit	-	-	-	-	1
Total	34	48	48	46	49

Number of Sharia Special Financial Institution from 2012-2016

Industry	2012	2013	2014	2015	2016
Sharia Guarantee Company	-	2	2	2	2
Guarantee Company with a Sharia Business Unit	-	-	1	1	2
PT.Pegadaian (persero) with a Sharia Business Unit	1	1	1	1	1
Indonesia Eximbank with a Sharia Business Unit	1	1	1	1	1
Total	2	4	5	5	6

Islamic Financial Institution in Indonesia based on Asset Ratio





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Islamic Finance in Indonesia's National Account



SECTORING AND SUBSECTORING

1

HOUSEHOLD



2

NPISH



3

GOVERNMENT



4

NON FINANCIAL CORPORATION

- ✓ Public NF Corp.
- ✓ Private NF Corp.



5

FINANCIAL CORPORATION

- ✓ Central bank
- ✓ DTC except CB
- ✓ IC
- ✓ PF
- ✓ Leasing company
- ✓ Pawnshop
- ✓ Other



6

REST OF THE WORLD



DATA SOURCES (1)

MAIN AND SUPPORTING DATA

HOUSEHOLD

Main Data Sources:

1. Special Survey of Household Savings and Investment (*SKTIR*)
2. National Socioeconomic Survey (*SUSENAS*)



Supporting Data Sources:

1. Compensations of Employees, Labor Force Survey (*SAKERNAS*)
2. Value added of micro and small business, *UMKM Surveys*
3. Data and indicators from other institutions, e.g: Central Bank (BI), OJK, Ministry of Cooperative, Tax Office, etc

NPISH

Main Data Sources :

Special Survey of Non-profit Institutions serving Households (*SKLNP*)

Supporting Data Sources :

Population of NPISH from:

1. Village Potential Census *PODES*
2. Directory from other institutions : Ministry of Home Affairs, Ministry of Religious Affairs, etc



GENERAL GOVERNMENT

Main Data Sources :

1. Central Gov. Budget Realizations , MoF
2. Local Gov. Budget Realization from Provinces and Regency , BPS
3. Village's Financial Statistics, BPS
4. Central government spending (11 digits), Fiscal Policy Office MoF
5. Cash transfer to the poor and family allowance realization, DG of Budget MoF



DATA SOURCES(2)

MAIN AND SUPPORTING DATA

NON-FINANCIAL CORPORATION

Main Data Sources :

1. The financial statements of companies listed on the Indonesia Stock Exchange (IDX)

Note:

- The financial statements of the company consists of a year-end balance sheet, profit and loss statements, and changes in equity
 - The financial statements of the company have a different format
2. Special Survey of Non-Financial Corporation (SKPS)
 3. UMKM Survey from Directorate of Production Account
 4. SOE's financial report, Ministry of SOE
 5. Regional Owned Ent. Survey, BPS



FINANCIAL CORPORATION

Main Data Sources :

Financial company report from Central Bank ; OJK ; and Pawnshop



Note :

1. The financial statements of the company consists of a year-end balance sheet, profit and loss statements, and changes in equity
2. The financial statements of the company have a different format
3. The financial statements used in the form of consolidation report

REST OF THE WORLD

Main Data Sources :

1. Export and import reports/documents(PEB/PIB)
2. BOP and IIP

Note :

1. PEB, PIB, and BOP used to estimate current account
2. IIP used to estimate accumulation account

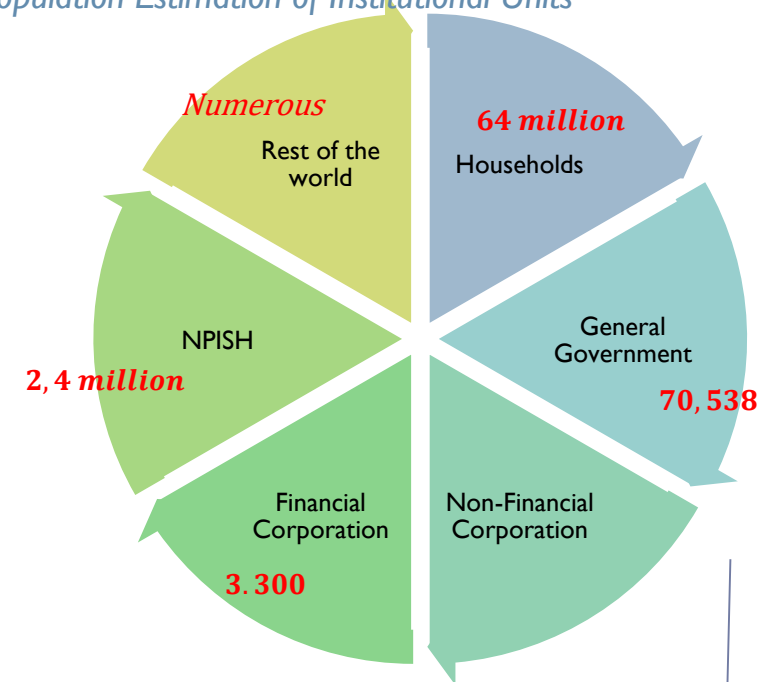


Current Progress of FSA

- ▶ Cooperation with several institutions have been developed such as Bank Indonesia, Ministry of Finance, OJK, Investment board (BKPM), Kemeneg BUMN etc. MoU of BPS-OJK and BPS-BI have been proposed.
- ▶ Preliminary figures of FSA year 2010 and 2011 are available and consistent with *Supply and Use Table*.
 - ▶ Identification and estimation of institutional unit
 - ▶ Identification of concepts, coverage, data sources, classification & methodology
 - ▶ Construction of “From whom to whom“ for Financial instruments in Financial account (Bonds, equity, deposits, financial derivative and etc)
 - ▶ Matrice of balance for interest, transfer, dividend, etc.
 - ▶ Valuation of transaction and Revaluation in financial account

1	: central government
33	: province
505	: city/municipality
70 000	: village

Population Estimation of Institutional Units



Listed : 308
Unlisted : many
State owned Enterprise : 120
Local gov. owned Enterprise : 570

Treatment of Islamic Financial Institution in Indonesia

- ❑ Islamic Financial Institutions are growing bigger in later few years (2012-2016).
- ❑ Share of Islamic Financial Institutions are relative small (around 5%) compare with conventional ones.
- ❑ Indonesia do not yet treatment in islamic finance due to lack of the manual and country practice.



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