

# Rohr INTERNATIONAL

## WEEKLY REPORT & EVENT CALENDAR

Week of June 30 – July 4, 2014

Central Bank Rate Decision	Important (Non-bold) Report/Event	Debt Auction or Event
Key Release or Event	Speech or Testimony	Holiday/Ad Hoc Event

Central Bank Rates (with anticipated change '>' if meeting scheduled)					
USD:	0.25%	GBP:	0.50%	CHF:	0.00%
EUR:	0.15%	AUD:	2.50%	NZD:	3.25%
JPY:	0.10%	CAD:	1.00%		

*[Italicized items imported from non-core calendars. Bold items are more influential]*

***“Chance favors the prepared mind.” –L. Pasteur***

Monday	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
New Zealand	Building Permits (MoM)		1.50%	22:45	18:45
Japan	Industrial Production (MoM)		-2.80%	23:50	19:50
<b>Japan</b>	<b>Industrial Production (YoY)</b>		<b>3.80%</b>	<b>23:50</b>	<b>19:50</b>
Japan	Official Reserve Assets		\$1283.9B		
Australia	HIA New Home Sales (MoM)		2.90%	01:00	21:00
New Zealand	ANZ Activity Outlook		51.00	01:00	21:00
New Zealand	NBNZ Business Confidence		53.50	01:00	21:00
Australia	Private Sector Credit (MoM)		0.50%	01:30	21:30
<b>Australia</b>	<b>Private Sector Credit (YoY)</b>		<b>4.60%</b>	<b>01:30</b>	<b>21:30</b>
New Zealand	Money Supply M3 (YoY)		5.30%	03:00	23:00
Japan	Vehicle Production (YoY)		3.40%	04:00	00:00
<b>Japan</b>	<b>Small Business Confidence</b>		<b>46.60</b>	<b>05:00</b>	<b>01:00</b>
Japan	Housing Starts (YoY)		-3.30%	06:00	02:00
<b>Japan</b>	<b>Annualized Housing Starts</b>		<b>0.906M</b>	<b>05:00</b>	<b>01:00</b>
<b>Japan</b>	<b>Construction Orders (YoY)</b>		<b>104.90%</b>	<b>06:00</b>	<b>02:00</b>
Euro-zone	German Retail Sales (MoM)	0.80%	-0.90%	<b>06:00</b>	<b>02:00</b>
<b>Euro-zone</b>	<b>German Retail Sales (YoY)</b>	<b>2.10%</b>	<b>3.20%</b>	<b>06:00</b>	<b>02:00</b>

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Central Bank Rate Decision	Important (Non-bold) Report/Event	Debt Auction or Event
Key Release or Event	Speech or Testimony	Holiday/Ad Hoc Event

Mon. (cont.)	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
Euro-zone	Euro-Zone M3 s.a. (YoY)		0.80%	08:00	04:00
Euro-zone	Euro-Zone M3 s.a. (3M/3M)		1.00%	08:00	04:00
<b>UK</b>	<b>Net Consumer Credit</b>		<b>0.7B</b>	<b>08:30</b>	<b>04:30</b>
UK	M4 Money Supply (MoM)		-0.20%	08:30	04:30
UK	M4 Money Supply (YoY)		-0.60%	08:30	04:30
UK	M4 Ex IOFCs 3M Annualised		4.50%	08:30	04:30
<b>UK</b>	<b>Net Lending Sec. on Dwellings</b>		<b>1.7B</b>	<b>08:30</b>	<b>04:30</b>
UK	Mortgage Approvals		62.9K	08:30	04:30
Euro-zone	Italian CPI (NIC incl. tobacco) (MoM)	0.10%	-0.10%	09:00	05:00
Euro-zone	Italian CPI (NIC incl. tobacco) (YoY)	0.30%	0.50%	09:00	05:00
Euro-zone	Italian CPI - EU Harmonized (MoM)	0.20%	-0.10%	09:00	05:00
<b>Euro-zone</b>	<b>Italian CPI - EU Harmonized (YoY)</b>	<b>0.40%</b>	<b>0.40%</b>	<b>09:00</b>	<b>05:00</b>
Euro-zone	Euro-Zone CPI Estimate (YoY)			09:00	05:00
<b>Euro-zone</b>	<b>Euro-Zone CPI - Core (YoY)</b>		<b>0.70%</b>	<b>09:00</b>	<b>05:00</b>
<b>Canada</b>	<b>GDP (MoM)</b>		<b>0.10%</b>	<b>12:30</b>	<b>08:30</b>
<b>Canada</b>	<b>GDP (YoY)</b>		<b>2.10%</b>	<b>12:30</b>	<b>08:30</b>
US	NAPM-Milwaukee		63.49	13:00	09:00
<b>US</b>	<b>Chicago Purchasing Manager</b>	<b>63.00</b>	<b>65.50</b>	<b>13:45</b>	<b>09:45</b>
US	Pending Home Sales (MoM)		0.40%	14:00	10:00
US	Pending Home Sales (YoY)		-9.40%	14:00	10:00
<b>US</b>	<b>Dallas Fed Manufacturing Activity</b>		<b>8.00</b>	<b>14:30</b>	<b>10:30</b>
<b>US</b>	<b>Fed's Williams to Speak in Sun Valley, ID</b>			<b>17:10</b>	<b>13:10</b>

Tuesday	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
New Zealand	ANZ Roy Morgan Weekly Consumer Confidence Index			23:30	19:30
<b>Australia</b>	<b>AiG Performance of Manufacturing Index</b>		<b>49.20</b>	<b>23:30</b>	<b>19:30</b>

Central Bank Rate Decision	Important (Non-bold) Report/Event	Debt Auction or Event
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Tue. (cont.)	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
Japan	Tankan Large Manufacturers Index	15.00	17.00	23:50	19:50
Japan	<b>Tankan Large Manufacturers Outlook</b>		<b>8.00</b>	<b>23:50</b>	<b>19:50</b>
Japan	Tankan Non-Manufacturing Index	19.00	24.00	23:50	19:50
Japan	<b>Tankan Non-Manufacturing Outlook</b>	<b>21.00</b>	<b>13.00</b>	<b>23:50</b>	<b>19:50</b>
Japan	Tankan Small Mfg Index	-1.00	4.00	23:50	19:50
Japan	<b>Tankan Small Mfg Outlook</b>	<b>1.00</b>	<b>-6.00</b>	<b>23:50</b>	<b>19:50</b>
Japan	<b>Tankan Large All Industry Capex</b>		<b>0.10%</b>	<b>23:50</b>	<b>19:50</b>
Japan	Loans & Discounts Corp (YoY)		2.30%	23:50	19:50
Australia	RPData/Rismark House Px (MoM)		-1.90%	00:00	20:00
UK	Halifax Plc House Prices s.a. (MoM)		3.90%		
UK	Halifax House Price (3MoY)		8.70%		
US	Domestic Vehicle Sales		13.11M		
US	<b>Total Vehicle Sales</b>		<b>16.70M</b>		
China	<b>Manufacturing PMI</b>	<b>51.00</b>	<b>50.80</b>	<b>01:00</b>	<b>21:00</b>
Japan	Labor Cash Earnings (YoY)		0.90%	01:30	21:30
Japan	<b>Markit/JMMA Japan Manufacturing PMI</b>			<b>01:35</b>	<b>21:35</b>
China	<b>HSBC China Manufacturing PMI</b>			<b>01:45</b>	<b>21:45</b>
Australia	<b>Reserve Bank of Australia Rate Decision and Statement</b>	<b>2.50%</b>	<b>2.50%</b>	<b>04:30</b>	<b>00:30</b>
Japan	Vehicle Sales (YoY)		-5.60%	05:00	01:00
Australia	RBA Commodity Index SDR (YoY)		-12.80%	06:30	02:30
Australia	Commodity Index (Australian dollar)		97.40	06:30	02:30
Euro-zone	<b>Spanish Markit Manufacturing PMI</b>	<b>52.90</b>	<b>52.90</b>	<b>07:13</b>	<b>03:13</b>
Switzerland	SVME-Purchasing Managers Index	52.80	52.50	07:30	03:30
UK	<b>£4.0B 5-yr Gilt (1.75%) auction</b>			<b>07:30</b>	<b>03:30</b>
Euro-zone	<b>Italian Markit/ADACI Manufacturing PMI</b>	<b>53.20</b>	<b>53.20</b>	<b>07:45</b>	<b>03:45</b>
Euro-zone	<b>French Markit Manufacturing PMI</b>	<b>74.80</b>	<b>74.80</b>	<b>07:50</b>	<b>03:50</b>

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Tue. (cont.)	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
Euro-zone	German Markit/BME Manufacturing PMI	52.40	52.40	07:55	03:55
Euro-zone	German Unemployment Change	-10k	24K	07:55	03:55
Euro-zone	German Unemployment Rate s.a.	6.70%	6.70%	07:55	03:55
Euro-zone	Euro-zone Markit Manufacturing PMI	51.90	51.90	08:00	04:00
Euro-zone	Italian Unemployment Rate	12.60%	12.60%	08:00	04:00
UK	Markit UK PMI Manufacturing s.a.	56.80	57.00	08:30	04:30
Euro-zone	Euro-Zone Unemployment Rate	11.70%	11.70%	09:00	05:00
ALL	OECD Consumer Price Indices			10:00	06:00
Canada	Markets Closed for Canada Day Holiday				
US	Weekly ICSC US Same-Store Sales (week ending JUN 28)			11:45	07:45
UK	Details 46-yr Gilt (4.00%) auction on JUL 08			13:30	09:30
UK	BoE releases record of JUN 17 FPC Meeting				
US	Markit US Manufacturing PMI	55.90	55.4	13:45	09:45
US	ISM Prices Paid	60.00	60.00	14:00	10:00
US	Construction Spending (MoM)	0.50%	0.20%	14:00	10:00
US	IBD/TIPP Economic Optimism		47.70	14:00	10:00
US	ISM Manufacturing	55.50	55.40	14:00	10:00
UK	BoE's Bulley at All Party Parliamentary Group on Insurance and Financial Services, London. Text to be confirmed			15:30	11:30

Wednesday	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
UK	Construction Spending annual revisions			14:00	10:00
Japan	Monetary Base End of period		¥226.6T	23:50	19:50
Japan	Monetary Base (YoY)		45.60%	23:50	19:50
New Zealand	ANZ Commodity Price		-2.20%	01:00	21:00
Australia	\$A600M 19-yr Australian T-bond (4.50%) auction			01:00	21:00
Australia	Trade Balance	-\$A120M	-\$A122M	01:30	21:30

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Wed. (cont.)	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
UK	Nationwide House Prices s.a. (MoM)	0.50%	0.70%	06:00	02:00
UK	Nationwide House Prices n.s.a. (YoY)	11.20%	11.10%	06:00	02:00
Euro-zone	<b>€4.0B 5-yr German Bobl Auction</b>			07:30	03:30
UK	Markit/CIPS UK Construction PMI		60.00	08:30	04:30
Euro-zone	Euro-Zone PPI (MoM)	-0.10%	-0.10%	09:00	05:00
Euro-zone	Euro-Zone PPI (YoY)	-1.00%	-1.20%	09:00	05:00
US	MBA Mortgage Applications			11:00	07:00
US	Challenger Job Cuts (YoY)		45.50%	11:30	07:30
US	RBC Consumer Outlook Index		51.00	11:30	07:30
US	ADP Employment Change	205K	179K	12:15	08:15
Canada	RBC Canadian Manufacturing PMI		52.20	13:30	09:30
US	ISM New York		55.30	13:45	09:45
US	Factory Orders	-0.20%	0.70%	14:00	10:00
US	DOE U.S. Crude Oil Inventories			14:30	10:30
US	DOE U.S. Distillate Inventory			14:30	10:30
US	DOE Cushing OK Crude Inventory			14:30	10:30
US	DOE U.S. Gasoline Inventories			14:30	10:30
US	<b>Fed's Yellen delivers lecture on Financial Stability at IMF, Washington DC</b>			15:00	11:00
UK	<b>BoE's Haldane panelist at Financial Times Camp Alphaville, London. No text released</b>			16:00	12:00

Thursday	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
Australia	AiG Performance of Service Index		49.90	23:30	19:30
Japan	<b>¥2.4T 10-yr JGB auction</b>			22:30	18:30
China	Non-manufacturing PMI		55.50	01:00	21:00
Australia	<b>RBA's Stevens speech to economics conference, Hobart</b>			01:00	21:00
Australia	Retail Sales s.a. (MoM)		0.20%	01:30	21:30

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Thu. (cont.)	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
Australia	Building Approvals (MoM)		-5.60%	01:30	21:30
Australia	Building Approvals (YoY)		1.10%	01:30	21:30
Japan	Markit Japan Services PMI		49.30	01:35	21:35
Japan	Markit/JMMA Japan Composite PMI		49.20	01:35	21:35
China	HSBC China Services PMI		50.70	01:45	21:45
China	HSBC China Composite PMI		50.20	01:45	21:45
Euro-zone	<i>Spanish Bono/Obligacion Auction</i>			06:30	02:30
Euro-zone	<i>(€7.5-8.5B 10-yr (1.75%), 13-yr (2.75%) &amp; 16-yr (2.50%) French OAT Auctions</i>			06:50	02:50
Euro-zone	Spanish Markit/ADACI Services PMI		51.60	07:45	03:45
Euro-zone	Italian Markit/ADACI Services PMI	55.80	55.70	07:13	03:13
Euro-zone	Italian Markit/ADACI Composite PMI			07:45	03:45
Euro-zone	French Markit Services PMI	51.80	51.60	07:50	03:50
Euro-zone	French Markit Composite PMI	48.00	48.00	07:50	03:50
Euro-zone	German Markit Services PMI	54.80	54.80	07:55	03:55
Euro-zone	German Markit/BME Composite PMI	54.20	54.20	07:55	03:55
Euro-zone	Euro-zone Markit Services PMI	52.80	52.80	08:00	04:00
Euro-zone	Euro-zone Markit Composite PMI	52.80	52.80	08:00	04:00
UK	Markit/CIPS UK Services PMI	58.30	58.60	08:30	04:30
UK	Markit/CIPS UK Composite PMI	58.60	59.00	08:30	04:30
UK	Official Reserves Changes		-\$613M	08:30	04:30
Euro-zone	Euro-Zone Retail Sales (MoM)	0.20%	0.40%	09:00	05:00
Euro-zone	Euro-Zone Retail Sales (YoY)	1.20%	2.40%	09:00	05:00
ALL	<b>OECD Quarterly National Accounts – Contributions to GDP Growth</b>			10:00	06:00
UK	<i>BoE's Cunliffe speech at International Festival for Business conference, Liverpool. Text released</i>			11:00	07:00

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Thu. (cont.)	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
<b>Euro-zone</b>	<b>European Central Bank Rate Decision and Statement</b>	<b>0.15%</b>	<b>0.15%</b>	<b>11:45</b>	<b>07:45</b>
<b>Euro-zone</b>	<b>ECB Marginal Lending Facility</b>	<b>0.40%</b>	<b>0.40%</b>	<b>11:45</b>	<b>07:45</b>
<b>Euro-zone</b>	<b>ECB Deposit Facility Rate</b>	<b>-0.10%</b>	<b>-0.10%</b>	<b>11:45</b>	<b>07:45</b>
Canada	International Merchandise Trade	-\$C0.30B	-\$C0.64B	12:30	08:30
<b>US</b>	<b>Trade Balance</b>	<b>-\$45.0B</b>	<b>-\$47.2B</b>	<b>12:30</b>	<b>08:30</b>
<b>US</b>	<b>Initial Jobless Claims</b>	<b>314K</b>	<b>312K</b>	<b>12:30</b>	<b>08:30</b>
US	Continuing Claims	2560K	2571K	12:30	08:30
<b>US</b>	<b>Change in Non-farm Payrolls</b>	<b>210K</b>	<b>217K</b>	<b>12:30</b>	<b>08:30</b>
US	Two-Month Payroll Net Revision			12:30	08:30
US	Change in Private Payrolls	210K	216K	12:30	08:30
US	Change in Manufacturing Payrolls		10K	12:30	08:30
<b>US</b>	<b>Unemployment Rate</b>	<b>6.30%</b>	<b>6.30%</b>	<b>12:30</b>	<b>08:30</b>
US	Labor Force Participation Rate		62.80%	12:30	08:30
US	Underemployment Rate		12.20%	12:30	08:30
<b>US</b>	<b>Average Weekly Hours</b>	<b>34.50</b>	<b>34.50</b>	<b>12:30</b>	<b>08:30</b>
US	Average Hourly Earnings (MoM)	0.20%	0.20%	12:30	08:30
<b>US</b>	<b>Average Hourly Earnings (YoY)</b>		<b>2.10%</b>	<b>12:30</b>	<b>08:30</b>
US	Change in Household Employment		145.00	12:30	08:30
<b>Euro-zone</b>	<b>ECB's Draghi post- rate decision press conference</b>			<b>12:30</b>	<b>08:30</b>
<b>US</b>	<b>Details 3-yr &amp; 10-yr T-note and 30-yr T-bond auctions JUL 8, 9, 10</b>			<b>13:00</b>	<b>09:00</b>
<b>US</b>	<b>Markit US Services PMI</b>			<b>13:45</b>	<b>09:45</b>
<b>US</b>	<b>Markit US Composite PMI</b>			<b>13:45</b>	<b>09:45</b>
<b>US</b>	<b>ISM Non-Manufacturing Composite</b>	<b>56.30</b>	<b>56.30</b>	<b>14:00</b>	<b>10:00</b>
US	EIA Natural Gas Storage Change			14:30	10:30
<b>Euro-zone</b>	<b>Merkel, Draghi, Schaeuble, Weidmann Speak at Christian Democratic Union, Berlin</b>			<b>15:00</b>	<b>11:00</b>
<b>US</b>	<b>Early Markets Close (incl. NYSE) prior to Independence Day Holiday</b>				
<b>Euro-zone</b>	<b>ECB's Draghi speech on German and European Change, Berlin</b>			<b>17:15</b>	<b>13:15</b>

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Friday	Report / Event	ESTIMATE	PREVIOUS	GMT	EDT
Australia	<b>\$A600M 12-yr Australian T-bond (4.25%) auction</b>			01:00	21:00
Euro-zone	German Factory Orders s.a. (MoM)	-1.00%	3.10%	06:00	02:00
Euro-zone	German Factory Orders n.s.a. (YoY)	6.10%	6.30%	06:00	02:00
Euro-zone	Germany Markit Construction PMI		48.10	07:30	03:30
UK	New Car Registrations (YoY)		7.70%	08:00	04:00
Euro-zone	German Markit Retail PMI		52.50	08:10	04:10
Euro-zone	French Markit Retail PMI		50.50	08:10	04:10
Euro-zone	Euro-zone Markit Retail PMI		49.90	08:10	04:10
Euro-zone	Italian Markit Retail PMI		45.20	08:10	04:10
Euro-zone	<b>ECB announces 3-yr LTRO repayment</b>			10:00	06:00
US	<b>Markets Closed in Observance of Independence Day</b>				

We hope you find this helpful.

-Rohr

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