
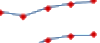




















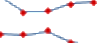

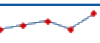


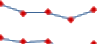






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Global Markets	Close	Change	5-Day Trend
Dow Jones	36,404.93	0.43%	
S&P 500	4,622.44	0.39%	
Nasdaq	14,432.49	0.20%	
FTSE 100	7,544.89	-0.13%	
Nikkei 225	32,791.80	1.50%	
Shanghai Composite	2,991.44	0.74%	
Shenzhen	9,632.61	0.82%	
Hang Seng	16,201.49	-0.81%	
SET	1,380.99	0.16%	
JCI	7,088.79	-0.99%	
Malaysia Markets			
FBM KLCI	1,446.39	0.31%	
FBM Top 100	10,347.66	0.46%	
FBM Small Cap	16,104.14	0.42%	
FBM ACE	5,109.16	0.05%	
Market Activities			
Trading Volume (m)	3,820.82	27.6%	
Trading Value (RM m)	2,473.53	24.1%	
Trading Participants	Change		
Local Institution	114.13	42.78%	
Retail	-34.67	26.75%	
Foreign	-79.46	30.46%	
Market Breadth	No. of stocks		5-Day Trend
Advancers	487	55.3%	
Decliners	394	44.7%	
Commodities			
FKLI (Futures)	1,445.50	0.21%	
3M CPO (Futures)	3,741.00	0.37%	
Rubber (RM/kg)	662.00	0.38%	
Brent Oil (USD/bbl)	76.03	0.25%	
Gold (USD/oz)	1,993.05	-0.48%	
Forex			
USD/MYR	4.6827	-0.39%	
SGD/MYR	3.4848	-0.04%	
CNY/MYR	0.6523	-0.14%	
JPY/MYR	3.2017	-0.08%	
EUR/MYR	5.0415	-0.28%	
GBP/MYR	5.8789	-0.37%	

Source: Bloomberg, Apex Securities

Eyes onto US CPI data

Market Review & Outlook

- Malaysia Market Review.** The FBM KLCI (+0.31%) rebounded from fifth consecutive losing sessions, propelled by a positive sentiment from US market overnight. Similarly, the lower liners advanced, while the utilities (+2.80%) and property sector (+0.94%) were the leaders of the gainers, taking cue from the theme of Jensen Huang's visit and Johor property players related to HSR project
- Global Markets Review.** US stock markets extended their gains ahead of the CPI data and interest rate decisions this week. Similarly, European stock markets closed green led by media stocks, and Asia equity markets ended mostly higher, taking cue from positive sentiment from US overnight.
- Market Outlook.** We anticipate the FBM KLCI to trade flat today as investors may stay on the sidelines ahead of US key economic data and the Fed interest rate decision. Profit-taking activities may emerge from the property sector after the surge yesterday. Meanwhile, politics-related stocks may experience volatility today following the source of news of cabinet reshuffle taking place. Also, energy-related stocks may continue to build onto their previous session gains following the rebound in crude oil prices.

FBM KLCI Technical Review & Outlook



Source: Bloomberg

- Technical Commentary:** The FBM KLCI formed a bullish candle as the key index snapped a five-day losing streak to recover above SMA50. Indicators, however, remained weak as the MACD Line lingered below the Signal Line, while the RSI hovered below 50. Extended recovery is on the cards towards the resistance located at 1,465. Support is pegged around 1,430.

Company News *(source: various)*

- **Jentayu Sustainables Bhd**'s run-of-river hydropower plant Telekosang Hydro 2 (TH2) has achieved its initial operating date of Dec 9, 2023, with a target feed-in-tariff commencement date (FITCD) within the next 30 days.
- **DRB-Hicom Bhd** has entered into an agreement to form a joint-venture (JV) company with China's auto giant Zhejiang Geely Holding Group Co Ltd for the overall operation and management of the development and construction of the Automotive Hi-Tech Valley (AHTV) project in Tanjung Malim, Perak.
- **Censof Holdings Bhd** has secured a RM9.46 million contract from the Road Transport Department (JPJ) for the maintenance, verification and calibration services of 48 weighing instruments at JPJ enforcement stations.
- **Hong Leong Industries Bhd** (HLI) has sold its investment holding firm HLI Trading Ltd (HLIT) to Guoline International Ltd (GIL) for US\$7.78 million (RM36.22 million) in a related-party cash transaction.
- **Supermax Corp Bhd** said shareholders without any management role or position in the company's board of directors have no authority to make any official statement on its behalf.
- **Sentral Real Estate Investment Trust** (Sentral REIT) said on Monday that it has completed the acquisition of Menara CelcomDigi in Petaling Jaya from **Malaysian Resources Corp Bhd** (MRCB) for RM450 million.

Weekly Corporate Actions

Company	Corporate Actions	Entitlement	Ex-Date	Last Price (RM)	Dividend Yield
IGB Bhd	Interim	0.050	11/12/2023	2.420	2.1%
IGB Bhd	Special Cash	0.020	11/12/2023	2.420	0.8%
Uchi Technologies Bhd	Interim	0.090	11/12/2023	3.700	2.4%
Kumpulan Perangsang Selangor B	Interim	0.010	11/12/2023	0.725	14%
Sunmow Holdings Bhd	Interim	0.017	11/12/2023	1.080	15%
Maxim Global Bhd	Interim	0.020	11/12/2023	0.400	5.0%
Inta Bina Group Bhd	Interim	0.005	11/12/2023	0.260	19%
AMMB Holdings Bhd	Interim	0.060	12/12/2023	4.020	15%
KLCCP Stapled Group	Interim	0.088	12/12/2023	7.000	13%
KPJ Healthcare Bhd	Interim	0.011	12/12/2023	1.330	0.8%
KPJ Healthcare Bhd	Special Cash	0.003	12/12/2023	1.330	0.2%
Bintulu Port Holdings Bhd	Interim	0.030	12/12/2023	5.140	0.6%
Wellcall Holdings Bhd	Interim	0.018	12/12/2023	1.760	10%
Wellcall Holdings Bhd	Special Cash	0.010	12/12/2023	1.760	0.6%
Fima Corp BHD	Interim	0.050	12/12/2023	1.890	2.6%
Unimech Group Bhd	Interim	0.020	12/12/2023	1.820	1%
Rexit Bhd	Interim	0.050	12/12/2023	0.910	5.5%
Oceancash Pacific Bhd	Interim	0.005	12/12/2023	0.305	16%
RCE Capital Bhd	Interim	0.080	13/12/2023	2.990	2.7%
Berjaya Food Bhd	Stock Dividend	0.010	13/12/2023	0.620	16%
Power Root Bhd	Interim	0.020	13/12/2023	1.800	1%
Suria Capital Holdings Bhd	Interim	0.020	13/12/2023	1.810	1%
MST Golf Group Bhd	Interim	0.005	13/12/2023	0.475	1%
Able Global Bhd	Interim	0.020	13/12/2023	1.410	14%
Glomac Bhd	Final	0.013	13/12/2023	0.355	3.5%
FoundPac Group Bhd	Interim	0.005	13/12/2023	0.420	12%
Inari Amertron Bhd	Interim	0.022	14/12/2023	2.830	0.8%
Alliance Bank Malaysia Bhd	Interim	0.109	14/12/2023	3.490	3.1%
Kerjaya Prospek Group Bhd	Interim	0.020	14/12/2023	1.440	14%
Datasonic Group Bhd	Interim	0.006	14/12/2023	0.43	14%
AME Elite Consortium Bhd	Interim	0.020	14/12/2023	1.56	13%
Ann Joo Resources Bhd	Interim	0.013	14/12/2023	1.05	12%
Innoprise Plantations BHD	Interim	0.028	14/12/2023	1.3	2.1%
Oriental Interest Bhd	Interim	0.050	14/12/2023	1.31	3.8%
Lii Hen Industries BHD	Interim	0.015	14/12/2023	0.935	16%
SENG FONG HOLDINGS BHD	Interim	0.010	14/12/2023	0.76	13%
Scicom MSC Bhd	Interim	0.020	14/12/2023	1.09	18%
Focus Point Holdings Bhd	Interim	0.015	14/12/2023	0.76	2.0%
BP Plastics Holding Bhd	Interim	0.015	14/12/2023	1.19	13%
Negri Sembilan Oil Palms BHD	Special Cash	0.060	14/12/2023	3.26	18%
Negri Sembilan Oil Palms BHD	Interim	0.040	14/12/2023	3.26	12%
Jaycorp Bhd	Final	0.040	14/12/2023	0.75	5.3%
Sasbadi Holdings Bhd	Interim	0.003	14/12/2023	0.165	15%
Tri-Mode System M Bhd	Interim	0.004	14/12/2023	0.335	10%
Press Metal Aluminium Holdings	Interim	0.018	15/12/2023	4.8	0.4%
IJM Corp Bhd	Interim	0.020	15/12/2023	1.88	1%
Padini Holdings Bhd	Interim	0.025	15/12/2023	3.43	0.7%
Bonia Corp Bhd	Interim	0.020	15/12/2023	1.73	12%
George Kent Malaysia BHD	Interim	0.008	15/12/2023	0.47	16%
Kluang Rubber Co Malaya BHD	Final	0.010	15/12/2023	3.7	0.3%
Kluang Rubber Co Malaya BHD	Special Cash	0.017	15/12/2023	3.7	0.5%
Sungei Bagan Rubber Co Malaya	Final	0.020	15/12/2023	3.3	0.6%
Sungei Bagan Rubber Co Malaya	Special Cash	0.050	15/12/2023	3.3	15%
Fajarbaru Builder Group Bhd	Interim	0.005	15/12/2023	0.285	18%
EITA Resources Bhd	Interim	0.010	15/12/2023	0.82	12%
Matang Bhd	Final	0.002	15/12/2023	0.09	18%
Kuchai Development BHD	Final	0.010	15/12/2023	1.3	0.8%
Kuchai Development BHD	Special Cash	0.015	15/12/2023	1.3	12%
Ecoscience International Bhd	Bonus-Options	12	15/12/2023	0.405	-
Bank Islam Malaysia Bhd	Interim	0.126	18/12/2023	2.31	5.5%
VSTECs Bhd	Interim	0.025	18/12/2023	1.32	19%
CAM Resources BHD	Interim	0.010	18/12/2023	0.425	2.4%

Source: Apex Securities, Bloomberg

Weekly Economic Highlights

Date	Country	Key Events
Monday, 11 December, 2023	MY	Retail Sales
	MY	Industrial Production
Tuesday, 12 December, 2023	US	Consumer Inflation Expectations
	JP	Producer Price Index
	UK	Unemployment Rate
	EU	ZEW Economic Sentiment Index
	US	Inflation Rate
Wednesday, 13 December, 2023	UK	Manufacturing Production
	UK	Industrial Production
	EU	Industrial Production
	US	Producer Price Index
Thursday, 14 December, 2023	US	Federal Reserve Interest Rate Decision
	JP	Machinery Orders
	JP	Industrial Production
	UK	Bank of England's Interest Rate Decision
	EU	European Central Bank's Interest Rate Decision
Friday, 15 December, 2023	US	Retail Sales
	CN	Industrial Production
	CN	Retail Sales
	CN	Unemployment Rate
	US	Industrial Production
	US	Manufacturing Production

Source: TradingEconomics

Futures Markets

Futures Kuala Lumpur Composite Index

	JAN	FEB	MAR	APR
CHANGE	4	5	3	4
OPEN	1,444	1,446	1,434	1,433
High	1,448	1,451	1,436	1,436
Low	1,442	1,445	1,432	1,433
Settle	1,446	1,448	1,434	1,436
Volume	7,671	473	38	3
O.I.	34,884	1,040	1,047	169

Futures Crude Palm Oil

	APR	MAY	JUN	JUL
CHANGE	10	5	0	-3
OPEN	3,650	3,684	3,738	3,750
High	3,650	3,720	3,772	3,796
Low	3,610	3,673	3,719	3,747
Settle	3,605	3,694	3,741	3,766
Volume	74	4,602	22,103	8,093
O.I.	1,531	13,559	48,142	40,339

Top Active Stocks By Market Participants

LOCAL			FOREIGN		
Stocks	Value	Price	Stocks	Value	Price
YTLPOWR	198284310	2.510	YTLPOWR	218417194	2.510
YTL	161388471	1.870	YTL	151727046	1.870
AIRPORT	117556286	7.100	CIMB	107380466	5.780
SCIB	85404466	0.805	PBBANK	95719818	4.250
KPJ	78558449	1.330	SIME	34508191	2.340
WIDAD	73665211	0.470	MAYBANK	34256482	9.050
UEMS	61522994	0.755	QL	28733839	5.480
EKOVEST	52166367	0.470	MYEG	25744581	0.825
CIMB	51801072	5.780	TENAGA	24640274	9.910
IWCITY	46949812	0.615	GAMUDA	24032589	4.410

RETAIL			INSTITUTION		
Stocks	Value	Price	Stocks	Value	Price
YTL	95114142	1.870	YTLPOWR	290811602	2.510
SCIB	71607735	0.805	YTL	157057197	1.870
WIDAD	64533908	0.470	CIMB	156721819	5.780
YTLPOWR	62563515	2.510	AIRPORT	136106059	7.100
UEMS	44799181	0.755	PBBANK	131708269	4.250
EKOVEST	35604467	0.470	KPJ	85767020	1.330
IWCITY	34402759	0.615	MAYBANK	56274238	9.050
TANCO	31432728	0.580	TENAGA	47468126	9.910
PERTAMA	27564876	2.450	QL	46328638	5.480
LEFORM	26894056	0.360	RHBBANK	40421568	5.510

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