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Market Scorecard

Global Markets	Close	Change
Dow Jones	50,872.11	0.17%
S&P 500	7,386.65	-0.26%
Nasdaq	25,678.82	-0.97%
FTSE 100	10,227.33	-1.41%
STOXX Europe 600	618.64	-0.50%
Nikkei 225	65,416.63	2.17%
Shanghai Composite	4,010.03	1.28%
Shenzhen	15,268.71	3.02%
Hang Seng	24,565.90	-0.37%
KOSPI	8,096.93	8.18%
SET	1,584.14	1.44%
STI	5,023.25	1.20%
JCI	5,746.65	7.57%
Malaysia Markets		
FBM KLCI	1,675.50	-0.24%
FBM Top 100	12,291.99	-0.19%
FBM Small Cap	15,287.83	0.45%
FBM ACE	4,727.68	1.71%
Bursa Sector Performance		
Consumer	485.42	0.60%
Industrial Products	196.68	-0.17%
Construction	278.60	-0.67%
Technology	71.53	1.39%
Finance	19,496.88	-0.33%
Property	1,154.85	-1.78%
Plantation	8,742.44	0.20%
REIT	918.22	0.51%
Energy	787.63	-0.42%
Healthcare	1,606.71	-0.63%
Telecommunications & Media	404.38	-1.21%
Transportation & Logistics	998.81	-0.22%
Utilities	1,713.78	0.07%
Trading Activities		
Trading Volume (m)	3,763.73	8.2%
Trading Value (RM m)	2,900.47	-0.6%

Trading Participants	Change	
Local Institution	135.28	39.15%
Retail	94.91	26.51%
Foreign	-230.19	34.34%

Market Breadth	No. of stocks	
Advancers	538	48.6%
Decliners	568	51.4%

Commodities		
FKLI (Futures)	1,669.00	-0.27%
3M CPO (Futures)	4,528.00	-1.01%
Brent Oil (USD/bbl)	92.30	-1.92%
Gold (USD/oz)	4,256.07	0.86%
Forex		
USD/MYR	4.0605	-0.33%
SGD/MYR	3.1581	-0.05%
CNY/MYR	0.5996	-0.15%
JPY/MYR	2.5352	-0.42%
EUR/MYR	4.6944	0.09%
GBP/MYR	5.4353	0.10%

Source: Bloomberg, Apex Securities

Sentiment Remains Mixed

Malaysian Market Review. The FBM KLCI fell 0.24% to 1,675.50 on Tuesday, marking its second consecutive day of losses and underperforming most regional markets despite a broader rebound across Asia. Market sentiment remained subdued due to persistent foreign selling and profit-taking in selected heavyweight counters. Market breadth remained negative, with 568 decliners against 538 advancers. Sector-wise, Technology (+1.39%), Consumer Products & Services (+0.60%) and REITs (+0.51%) led gains, while Property (-1.78%), Telecommunications & Media (-1.21%) and Construction (-0.67%) were the main laggards.

Global Markets: U.S. equities closed mixed on Tuesday, with the Dow Jones Industrial Average (+0.17%) edging higher, while the S&P 500 (-0.26%) and Nasdaq Composite (-0.97%) ended lower as the recent rebound in semiconductor and AI-related stocks lost momentum. Investors continued to reassess valuations in technology counters following last week's sharp sell-off. Sentiment was partially supported by easing Middle East tensions and lower oil prices, although caution persisted ahead of the upcoming U.S. CPI release (CNBC). European equities also weakened, with the STOXX Europe 600 (-0.50%) ending lower as declines in energy and mining stocks weighed on sentiment following the pullback in crude oil prices (CNBC). Asian markets closed mostly higher, with South Korea's Kospi (+8.18%) leading regional gains as technology and semiconductor stocks rebounded. The Nikkei 225 (+2.17%) and CSI300 (+1.87%) also advanced, supported by improving sentiment towards AI-related stocks and easing geopolitical concerns, while the Hang Seng Index (-0.37%) ended slightly lower (CNBC).

Market Outlook. Market sentiment is likely to remain mixed as investors assess whether the recent rebound in global technology and semiconductor stocks can be sustained, amid renewed optimism surrounding AI-related themes ahead of the highly anticipated SpaceX and OpenAI IPOs. While lower oil prices have helped ease some inflation concerns, uncertainty surrounding developments in the Middle East may continue to drive market volatility. Domestically, the government's decision to maintain the current Budi95 fuel subsidy quota suggests that inflationary pressures could remain manageable despite ongoing geopolitical uncertainties, which could help support consumer sentiment. Investors are also likely to monitor domestic political developments, which may influence broader market sentiment in the near term. Nevertheless, investors are expected to remain cautious ahead of the upcoming U.S. CPI data, which could provide further direction for global markets and shape expectations for the Federal Reserve's policy path.

Sector focus. Technology and Financial Services may remain in focus amid improving AI-related sentiment, and resilient domestic fundamentals.

FBMKLCI Technical Outlook

Source: TradingView, Apex Securities

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Technical Commentary: The FBM KLCI remains under pressure after breaking below the neckline of its Double Top formation, although the benchmark index has shown signs of stabilising near the SMA200. While the broader technical outlook remains cautious, sustained holding above the 1,665–1,680 support region could help limit further downside pressure and support a technical rebound towards the 1,700-resistance level.

Company News

Capital A Bhd said the Singapore High Court has issued a seizure order over its stakes in BigPay and Teleport as part of enforcement proceedings related to a shareholder arbitration dispute. (*The Edge*)

Tanco Holdings Bhd managing director Datuk Seri Andrew Tan Jun Suan disposed of a 0.41% stake in the company for RM38.29 million, while the group also signed an MOU with China Mobile International Ltd to explore the development of a 50MW data centre in Port Dickson. (*The Edge*)

Duopharma Biotech Bhd's subsidiary has secured a RM155.28 million contract to supply insulin products to public healthcare facilities nationwide for three years. (*The Edge*)

Inari Amertron Bhd has appointed Datuk Phang Ah Tong as its new chairman, alongside several boardroom changes. (*The Edge*)

Dayang Enterprise Holdings Bhd's subsidiary has entered into a joint venture agreement with Brunei-based Petrokon Utama Sdn Bhd to pursue oil and gas opportunities in Brunei. (*The Edge*)

Kee Ming Group Bhd has secured a RM21.36 million subcontract for electrical engineering works for a hyperscale data centre project in Puncak Alam. (*The Edge*)

Sime Darby Property Bhd has launched a fund with up to RM1.25 billion in capital commitments to invest in data centres and industrial projects within its townships. (*The Edge*)

Weekly Corporate Actions

Company	Corporate Actions	Entitlement	Ex-Date	Last Price (RM)	Dividend Yield
Mr Diy Group M Bhd	Interim	0.016	8/6/2026	1.630	0.98%
Pecca Group Bhd	Interim	0.015	8/6/2026	1.470	1.02%
Jf Technology Bhd	Interim	0.003	8/6/2026	0.630	0.40%
Spritzer Bhd	Final	0.050	8/6/2026	2.530	1.98%
Betamek Bhd	Interim	0.013	8/6/2026	0.635	1.97%
Gdb Holdings Bhd	Interim	0.007	8/6/2026	0.550	1.27%
Heineken Malaysia Bhd	Final	1.120	9/6/2026	20.080	5.58%
Sunway Construction Group Bh	Special Cash	0.152	9/6/2026	7.360	2.07%
Sunway Construction Group Bh	Interim	0.076	9/6/2026	7.360	1.03%
Dayang Enterprise Hldgs Bhd	Interim	0.070	9/6/2026	1.840	3.80%
Uchi Technologies Bhd	Final	0.060	9/6/2026	2.930	2.05%
Shangri-La Hotels (Mal) Bhd	Final	0.060	9/6/2026	1.720	3.49%
Foundpac Group Bhd	Interim	0.010	9/6/2026	0.410	2.44%
Ep Manufacturing Berhad	Final	0.005	9/6/2026	0.450	1.17%
Divfex Bhd	Interim	0.002	9/6/2026	0.085	2.35%
Petronas Gas Bhd	Interim	0.160	10/6/2026	17.440	0.92%
Telekom Malaysia Bhd	Interim	0.065	10/6/2026	7.420	0.88%
Dialog Group Bhd	Interim	0.017	10/6/2026	2.040	0.83%
Magnum Bhd	Interim	0.025	10/6/2026	1.310	1.91%
Al-'Aqar Healthcare Real Est	Distribution	0.019	10/6/2026	1.200	1.61%
Malaysia Smelting Corp Bhd	Special Cash	0.040	10/6/2026	2.300	1.74%
Lim Seong Hai Capital Bhd	Interim	0.008	10/6/2026	0.240	3.13%
Al-Salam Real Estate Investm	Distribution	0.010	10/6/2026	0.510	1.88%
Jag Bhd	Interim	0.002	10/6/2026	0.365	0.55%
Celcomdigi Bhd	Interim	0.034	11/6/2026	2.810	1.21%
Misc Bhd	Interim	0.080	11/6/2026	8.160	0.98%
Klccp Stapled Group	Interim	0.093	11/6/2026	8.940	1.04%
Hap Seng Consolidated	Interim	0.100	11/6/2026	2.900	3.45%
Alliance Bank Malaysia Bhd	Interim	0.097	11/6/2026	4.730	2.06%
Gas Malaysia Bhd	Final	0.093	11/6/2026	5.260	1.77%
Kerjaya Prospek Group Bhd	Interim	0.035	11/6/2026	2.210	1.58%
Mi Technovation Bhd	Interim	0.010	11/6/2026	4.770	0.21%
Taliworks Corp Bhd	Interim	0.003	11/6/2026	0.400	0.63%
Ta Ann Holdings Berhad	Interim	0.050	11/6/2026	5.330	0.94%
Gdex Bhd	Final	0.002	11/6/2026	0.130	1.54%
Mnrb Holdings Bhd	Interim	0.050	11/6/2026	2.590	1.93%
Wellcall Holdings Bhd	Interim	0.016	11/6/2026	1.170	1.37%
Innoprise Plantations Bhd	Interim	0.040	11/6/2026	2.120	1.89%
Elk-Desa Resources	Interim	0.025	11/6/2026	1.050	2.38%
Scicom (Msc) Bhd	Interim	0.030	11/6/2026	1.700	1.76%
Autocount Dotcom Bhd	Interim	0.015	11/6/2026	0.660	2.27%
N2N Connect Bhd	Final	0.010	11/6/2026	0.325	3.08%
Inta Bina Group Bhd	Interim	0.005	11/6/2026	0.390	1.28%
Turbo-Mech Bhd	Final	0.005	11/6/2026	0.590	0.85%
Press Metal Aluminium Holdin	Interim	0.025	12/6/2026	9.220	0.27%
Inari Amertron Bhd	Interim	0.010	12/6/2026	2.280	0.44%
Igb Bhd	Special Cash	0.025	12/6/2026	2.450	1.02%
Padini Holdings Berhad	Special Cash	0.020	12/6/2026	1.460	1.37%
Padini Holdings Berhad	Interim	0.018	12/6/2026	1.460	1.23%
Bintulu Port Holdings Bhd	Interim	0.030	12/6/2026	5.690	0.53%
Pie Industrial Bhd	Special Cash	0.011	12/6/2026	1.510	0.73%
Pie Industrial Bhd	Interim	0.009	12/6/2026	1.510	0.60%
Sarawak Plantation Bhd	Interim	0.050	12/6/2026	3.770	1.33%
Meta Bright Group Bhd	Interim	0.000	12/6/2026	0.145	0.25%
Able Global Bhd	Interim	0.020	12/6/2026	1.500	1.33%
Kumpulan Kitacon Bhd	Interim	0.010	12/6/2026	0.670	1.49%
Hil Industries Berhad	Final	0.025	12/6/2026	0.725	3.45%
Skb Shutters Corp Bhd	Interim	0.055	12/6/2026	0.970	5.67%

Source: Bloomberg, Apex Securities

Weekly Economic Highlights

Date	Country	Key Events
Monday, 8 June, 2026	JP	1Q26 GDP Growth Rate
Tuesday, 9 June, 2026	CN	Balance of Trade
	US	ADP Employment Change
	US	Balance of Trade
	US	Existing Home Sales
Wednesday, 10 June, 2026	CN	Inflation Rate
	CN	Producer Price Index
	US	Core CPI Index
Thursday, 11 June, 2026	MY	Unemployment Rate
	EU	European Central Bank's Interest Rate Decision
	US	Producer Price Index
	US	Initial Jobless Claims
Friday, 12 June, 2026	MY	Industrial Production
	MY	Retail Sales
	UK	Industrial Production
	US	Michigan Consumer Sentiment (Preliminary)

Source: TradingEconomics, Apex Securities

Top Active Stocks by Market Participants

LOCAL			FOREIGN		
Stocks	Value (RM)	Price (RM)	Stocks	Value (RM)	Price (RM)
MAYBANK	201,229,093.98	10.620	MAYBANK	279,506,454.90	10.620
CIMB	186,501,541.81	7.370	CIMB	179,770,320.55	7.370
TANCO	115,021,207.46	0.800	PMETAL	105,008,970.00	8.960
UWC	81,013,816.00	5.450	TENAGA	72,664,421.00	14.140
ZETRIX	79,846,121.47	0.825	PBBANK	60,763,068.31	4.770
PMETAL	65,080,800.64	8.960	VITROX	59,169,248.00	7.160
TOPGLOV	56,456,709.95	0.825	SDG	54,582,920.00	6.020
IHH	55,935,736.57	8.700	ZETRIX	46,360,976.00	0.825
PBBANK	51,756,534.09	4.770	PETDAG	43,026,438.00	18.600
IOICORP	46,356,237.00	4.220	NESTLE	38,802,958.00	94.440

RETAIL			INSTITUTION		
Stocks	Value (RM)	Price (RM)	Stocks	Value (RM)	Price (RM)
TANCO	104,066,174.98	0.800	MAYBANK	456,981,293.18	10.620
ZETRIX	74,229,858.47	0.825	CIMB	353,664,213.55	7.370
PARAGON	32,103,120.00	4.810	PMETAL	167,260,666.00	8.960
TOPGLOV	26,063,620.95	0.825	PBBANK	102,373,836.13	4.770
SKYECHIP	25,750,669.82	2.920	IHH	94,261,955.57	8.700
CGB	25,541,619.00	0.895	UWC	92,399,998.00	5.450
MAYBANK	23,754,255.70	10.620	SDG	91,813,720.00	6.020
EG	22,832,079.90	1.890	VITROX	89,086,655.00	7.160
GIIB	19,857,549.65	0.460	TENAGA	86,932,991.20	14.140
AAX	19,537,248.40	1.140	TOPGLOV	66,498,882.00	0.825

Source: Dibots, Apex Securities

Recommendation Framework:
BUY: Total returns* are expected to exceed 10% within the next 12 months.
HOLD: Total returns* are expected to be within +10% to – 10% within the next 12 months.
SELL: Total returns* are expected to be below -10% within the next 12 months.
TRADING BUY: Total returns* are expected to exceed 10% within the next 3 months.
TRADING SELL: Total returns* are expected to be below -10% within the next 3 months.
*Capital gain + dividend yield

Sector Recommendations:
OVERWEIGHT: The industry defined by the analyst is expected to exceed 10% within the next 12 months.
NEUTRAL: The industry defined by the analyst is expected to be within +10% to – 10% within the next 12 months.
UNDERWEIGHT: The industry defined by the analyst, is expected to be below -10% within the next 12 months.

ESG Rating Framework:
★★★★★ : Appraised with 3% premium to fundamental fair value
★★★★ : Appraised with 1% premium to fundamental fair value
★★★ : Appraised with 0% premium/discount to fundamental fair value
★★ : Appraised with -1% discount to fundamental fair value
★ : Appraised with -5% discount to fundamental fair value

As of **Wednesday, 10 Jun, 2026**, the analyst(s), whose name(s) appears on the front page, who prepared this report, has interest in the following securities covered in this report:
(a) nil.