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Market Scorecard

Global Markets	Close	Change	5-Day Trend
Dow Jones	49,918.78	-1.87%	
S&P 500	7,266.99	-1.62%	
Nasdaq	25,169.50	-1.98%	
FTSE 100	10,254.81	0.27%	
STOXX Europe 600	618.17	-0.08%	
Nikkei 225	64,179.27	-1.89%	
Shanghai Composite	3,993.23	-0.42%	
Shenzhen	14,954.10	-2.06%	
Hang Seng	24,407.96	-0.64%	
KOSPI	7,730.82	-4.52%	
SET	1,563.59	-1.30%	
STI	4,958.85	-1.28%	
JCI	5,902.38	2.71%	
Malaysia Markets			
FBM KLCI	1,678.96	0.21%	
FBM Top 100	12,302.22	0.08%	
FBM Small Cap	15,200.66	-0.57%	
FBM ACE	4,660.65	-1.42%	
Bursa Sector Performance			
Consumer	484.94	-0.10%	
Industrial Products	196.83	0.08%	
Construction	276.71	-0.68%	
Technology	71.10	-0.60%	
Finance	19,582.41	0.44%	
Property	1,139.66	-1.32%	
Plantation	8,794.22	0.59%	
REIT	918.71	0.05%	
Energy	778.77	-1.12%	
Healthcare	1,594.41	-0.77%	
Telecommunications & Media	404.30	-0.02%	
Transportation & Logistics	1,003.77	0.50%	
Utilities	1,700.09	-0.80%	
Trading Activities			
Trading Volume (m)	3,970.55	5.5%	
Trading Value (RM m)	2,725.40	-6.0%	
Trading Participants	**Change**		
Local Institution	152.04	41.32%	
Retail	-18.11	27.14%	
Foreign	-133.93	31.53%	
Market Breadth	**No. of stocks**		**5-Day Trend**
Advancers	438	38.7%	
Decliners	693	61.3%	
Commodities			
FKLI (Futures)	1,678.00	0.54%	
3M CPO (Futures)	4,538.00	0.27%	
Brent Oil (USD/bbl)	94.70	2.56%	
Gold (USD/oz)	4,073.92	-3.79%	
Forex			
USD/MYR	4.0693	0.22%	
SGD/MYR	3.1610	0.09%	
CNY/MYR	0.5996	0.09%	
JPY/MYR	2.5357	0.02%	
EUR/MYR	4.7032	0.19%	
GBP/MYR	5.4528	0.32%	

Source: Bloomberg, Apex Securities

Caution Ahead

Malaysian Market Review. The FBM KLCI rose 0.21% to 1,678.96 on Wednesday, snapping a two-day losing streak and outperforming most regional markets despite a broader sell-off across Asia. Investor sentiment remained cautious ahead of the release of key U.S. inflation data and amid renewed Middle East tensions. Market breadth remained negative, with 693 decliners against 438 advancers. Sector-wise, Plantation (+0.59%), Transportation & Logistics (+0.50%) and Financial Services (+0.44%) led gains, while Property (-1.32%), Energy (-1.12%) and Utilities (-0.80%) were the main laggards.

Global Markets: U.S. equities closed sharply lower on Wednesday, with the Dow Jones Industrial Average (-1.87%), S&P 500 (-1.62%) and Nasdaq Composite (-1.98%) all ending in negative territory. Investor sentiment deteriorated after President Trump signalled further military action against Iran, reigniting concerns over escalating geopolitical tensions in the Middle East. Rising geopolitical risks also pushed oil prices higher, with Brent crude climbing 3.88% to US$95 per barrel. Meanwhile, semiconductor and AI-related stocks remained under pressure amid continued profit-taking and portfolio rebalancing ahead of the highly anticipated SpaceX IPO (CNBC). European equities were mixed, with the STOXX Europe 600 (-0.08%) ending marginally lower as weakness in technology and mining stocks offset gains in defensive sectors (CNBC). Asian markets closed broadly lower, with South Korea's Kospi (-4.52%) leading regional losses amid continued weakness in technology counters and rising geopolitical concerns. The Nikkei 225 (-1.89%), CSI300 (-1.11%) and Hang Seng Index (-0.64%) also ended lower as risk sentiment weakened across the region (CNBC).

Market Outlook. Market sentiment is likely to remain cautious as investors assess the latest U.S. inflation data, which showed headline CPI accelerated to a three-year high of 4.2%, while core inflation remained broadly in line with expectations. Investors will now look towards further guidance from Federal Reserve officials regarding the interest rate outlook. Meanwhile, optimism surrounding AI-related investments is expected to remain supportive ahead of the highly anticipated SpaceX IPO, although portfolio rebalancing activities ahead of the listing could contribute to near-term market volatility. Domestically, ongoing efforts to strengthen Malaysia's economic ties with Japan through energy and high-technology cooperation may provide a supportive backdrop for investor sentiment. Nevertheless, uncertainty surrounding developments in the Middle East and their potential impact on oil prices may continue to drive market volatility in the near term.

Sector focus. Plantation, Financial Services and Technology may remain in focus amid firm commodity prices, resilient domestic fundamentals and continued interest in AI-related investment themes.

FBMKLCI Technical Outlook

Source: TradingView, Apex Securities

Technical Commentary: The FBM KLCI remains at a critical juncture, hovering around the neckline of a bearish Double Top formation. A decisive break below this level could signal further consolidation or downside risk in the weeks ahead. Should the KLCI decisively breach the 1,670-neckline support, the index may extend its decline towards 1,640. On the upside, resistance is expected around the 1,700 mark.

Company News

Malayan Banking Bhd clarified that its Indonesian unit is not under investigation and that its personnel were only questioned as witnesses in an ongoing inquiry. (*The Edge*)

Gamuda Bhd is acquiring a stake in the Hazelwood North Solar Farm and battery energy storage system project in Victoria, Australia. (*The Edge*)

Scientex Bhd reported a 14.8% increase in 3QFY26 net profit to RM142.17 million and said it is implementing cost optimisation and efficiency measures to navigate industry headwinds. (*The Edge*)

Ann Joo Resources Bhd's joint venture has disposed of a 62-acre industrial land parcel in Gurun, Kedah, for RM119.6 million. (*The Edge*)

Rohas Tecnic Bhd's subsidiary HG Power Transmission Sdn Bhd has secured a RM42.4 million contract from Tenaga Nasional Bhd for fibre optic supply and services. (*The Edge*)

ISF Group Bhd has secured a RM14.54 million subcontract for internal sewerage works for a hyperscale data centre project. (*The Edge*)

Amway (Malaysia) Holdings Bhd has appointed Jason Leng Kek Mun as its new managing director, effective June 11, 2026. (*The Edge*)

OGX Group Bhd has secured a RM96.64 million contract to supply fibre optic cables, patch panels and related materials for data centre projects. (*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)**
ZETRIX	145,726,329.40	0.845	MAYBANK	135,145,400.20	10.680
CIMB	117,940,801.65	7.400	ZETRIX	127,074,725.70	0.845
PMETAL	105,611,347.90	8.900	CIMB	116,501,518.15	7.400
MAYBANK	92,889,674.00	10.680	PBBANK	82,810,716.60	4.800
SDG	82,383,482.90	6.030	PMETAL	72,411,756.00	8.900
IHH	76,609,028.76	8.670	TENAGA	72,121,240.60	14.220
PBBANK	72,490,291.36	4.800	SDG	58,977,770.00	6.030
IOICORP	57,265,016.96	4.280	GAMUDA	49,552,766.68	4.260
YTLPOWR	56,158,561.01	3.970	RHBBANK	47,166,118.00	8.440
RHBBANK	50,801,412.94	8.440	SUNCON	37,449,884.00	6.770

RETAIL			INSTITUTION		
Stocks	**Value (RM)**	**Price (RM)**	**Stocks**	**Value (RM)**	**Price (RM)**
ZETRIX	126,961,545.95	0.845	CIMB	224,415,859.71	7.400
YTL	33,821,715.29	1.980	MAYBANK	213,071,015.50	10.680
YTLPOWR	31,081,130.13	3.970	PMETAL	173,765,182.00	8.900
GIIB	28,859,181.80	0.480	ZETRIX	145,839,509.15	0.845
TANCO	27,179,461.80	0.500	PBBANK	145,036,455.60	4.800
SKYECHIP	25,683,469.82	2.800	SDG	139,611,476.44	6.030
PARAGON	25,344,983.00	4.690	TENAGA	116,667,194.02	14.220
CAPITALA	23,351,949.50	0.400	IHH	106,748,653.88	8.670
CGB	22,619,819.50	0.895	RHBBANK	94,369,331.00	8.440
HONGSENG	19,057,339.50	0.010	SUNCON	71,868,412.00	6.770

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 **Thursday, 11 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.

KDN PP13226/06/2024 (035469)