

Research Team

(603) 7890 8888

[research.dept@apexsecurities.com.my](mailto:research.dept@apexsecurities.com.my)

Market Scorecard

| Global Markets                  | Close         | Change | 5-Day Trend |
|---------------------------------|---------------|--------|-------------|
| Dow Jones                       | 50,848.75     | 1.86%  |             |
| S&P 500                         | 7,394.30      | 1.75%  |             |
| Nasdaq                          | 25,809.66     | 2.54%  |             |
| FTSE 100                        | 10,303.88     | 0.48%  |             |
| STOXX Europe 600                | 621.53        | 0.54%  |             |
| Nikkei 225                      | 64,217.27     | 0.06%  |             |
| Shanghai Composite              | 3,987.02      | -0.16% |             |
| Shenzhen                        | 14,851.98     | -0.38% |             |
| Hang Seng                       | 24,249.29     | -0.65% |             |
| KOSPI                           | 7,763.95      | 0.43%  |             |
| SET                             | 1,572.32      | 0.36%  |             |
| STI                             | 4,988.10      | 0.59%  |             |
| JCI                             | 5,886.03      | -0.28% |             |
| <b>Malaysia Markets</b>         |               |        |             |
| FBM KLCI                        | 1,679.53      | 0.03%  |             |
| FBM Top 100                     | 12,298.43     | -0.03% |             |
| FBM Small Cap                   | 15,212.13     | 0.08%  |             |
| FBM ACE                         | 4,671.76      | 0.24%  |             |
| <b>Bursa Sector Performance</b> |               |        |             |
| Consumer                        | 483.51        | -0.29% |             |
| Industrial Products             | 198.48        | 0.34%  |             |
| Construction                    | 277.87        | 0.12%  |             |
| Technology                      | 71.83         | 1.03%  |             |
| Finance                         | 19,503.66     | -0.10% |             |
| Property                        | 1,112.47      | -2.39% |             |
| Plantation                      | 8,805.83      | 0.13%  |             |
| REIT                            | 914.87        | -0.12% |             |
| Energy                          | 784.86        | 0.78%  |             |
| Healthcare                      | 1,612.02      | 1.10%  |             |
| Telecommunications & Media      | 399.99        | -1.07% |             |
| Transportation & Logistics      | 1,005.54      | 0.13%  |             |
| Utilities                       | 1,697.74      | -0.14% |             |
| <b>Trading Activities</b>       |               |        |             |
| Trading Volume (m)              | 3,324.31      | -16.3% |             |
| Trading Value (RM m)            | 2,885.90      | 5.9%   |             |
| <b>Trading Participants</b>     |               |        |             |
| Local Institution               | 16.03         | 45.61% |             |
| Retail                          | 22.29         | 25.02% |             |
| Foreign                         | -38.32        | 29.36% |             |
| <b>Market Breadth</b>           |               |        |             |
|                                 | No. of stocks |        | 5-Day Trend |
| Advancers                       | 567           | 50.4%  |             |
| Decliners                       | 559           | 49.6%  |             |
| <b>Commodities</b>              |               |        |             |
| FKLI (Futures)                  | 1,678.00      | 0.00%  |             |
| 3M CPO (Futures)                | 4,551.00      | 0.35%  |             |
| Brent Oil (USD/bbl)             | 89.13         | -6.18% |             |
| Gold (USD/oz)                   | 4,224.08      | -2.03% |             |
| <b>Forex</b>                    |               |        |             |
| USD/MYR                         | 4.0670        | -0.06% |             |
| SGD/MYR                         | 3.1573        | -0.12% |             |
| CNY/MYR                         | 0.6000        | -0.03% |             |
| JPY/MYR                         | 2.5335        | -0.09% |             |
| EUR/MYR                         | 4.6911        | -0.26% |             |
| GBP/MYR                         | 5.4334        | -0.36% |             |

Source: Bloomberg, Apex Securities

Risk Appetite Improves

**Malaysian Market Review.** The FBM KLCI edged 0.03% higher to 1,679.53 on Thursday, extending its gains for a second consecutive session amid selective buying in key sectors. Market sentiment improved modestly, with market breadth turning slightly positive with 567 advancers against 559 decliners. Sector-wise, Health Care (+1.10%), Technology (+1.03%) and Industrial Products & Services (+0.84%) led gains, while Property (-2.39%), Telecommunications & Media (-1.07%) and REIT (-0.42%) were the main laggards.

**Global Markets:** U.S. equities rebounded strongly on Thursday, with the Dow Jones Industrial Average (+1.86%), S&P 500 (+1.75%) and Nasdaq Composite (+2.54%) all ending higher. Investor sentiment improved after President Trump cancelled planned strikes on Iran and indicated that a nuclear agreement with Tehran could be signed soon, easing concerns over further escalation in the Middle East. The de-escalation also weighed on oil prices, with Brent crude falling 6.18% to US\$89.13 per barrel. Meanwhile, technology and semiconductor stocks led gains, supported by bargain hunting following the recent sell-off and growing optimism ahead of SpaceX's highly anticipated IPO (CNBC). European equities also advanced, with the STOXX Europe 600 (+0.54%) ending higher despite the ECB raising interest rates by 25 basis points (CNBC). Asian markets closed mixed, with South Korea's Kospi (+0.43%) rebounding from earlier losses, while the Nikkei 225 was broadly flat and the CSI300 (-0.55%) and Hang Seng Index (-0.65%) ended lower amid lingering geopolitical concerns (CNBC).

**Market Outlook.** Market sentiment is likely to remain positive today, supported by the strong overnight performance on Wall Street and the sharp decline in oil prices following signs of easing geopolitical tensions in the Middle East. Meanwhile, investor interest in AI-related investments is expected to remain strong ahead of the highly anticipated SpaceX IPO, which could continue to support sentiment towards technology-related counters. Domestically, Malaysia's fundamentals remain resilient despite external uncertainties, supported by healthy investment activity and sustained demand for AI-related electronics and services. However, local political uncertainties remain a key risk factor that could weigh on overall market sentiment.

**Sector focus.** Technology and Consumer sector may remain in focus amid improving risk appetite, easing geopolitical tensions and continued interest in AI-related investment themes. Meanwhile, Energy-related counters could face near-term selling pressure following the sharp decline in crude oil prices.

FBMKLCI Technical Outlook



TradingView

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

**Capital A Bhd** said the Singapore court order to seize shares in BigPay and Teleport is not expected to result in any losses for the group, as the related claim has already been accounted for in its financial statements. (*The Edge*)

**Coastal Contracts Bhd** said a consortium led by its Mexican joint venture has secured a US\$204.8 million contract from Pemex for the development and operation of a gas sweetening plant in Mexico. (*The Edge*)

**Bermaz Auto Bhd** reported that its 4QFY26 net profit more than doubled to RM46.62 million, driven by stronger Mazda sales and improved margins. (*The Edge*)

**Titijaya Land Bhd** has partnered with PNSB Construction Sdn Bhd to develop 1,202 affordable Rumah Idaman housing units in Selangor. (*The Edge*)

**FACB Industries Incorporated Bhd** said its shares will be suspended from July 22 after its public shareholding spread fell below Bursa Malaysia's minimum requirement. (*The Edge*)

**Kerjaya Prospek Group Bhd** has partnered Aspen Vision Development Sdn Bhd to jointly develop a 34.84-acre mixed-use project in Prai, Penang. (*The Edge*)

**Shin Yang Group Bhd's** subsidiary has filed a lawsuit against Petroschiff Marine Logistics Sdn Bhd to recover RM2.96 million in alleged unpaid charter fees and related costs. (*The Edge*)

**Malaysia Marine and Heavy Engineering Holdings Bhd's** subsidiary has been sued for RM54.01 million over the alleged wrongful termination of a contract. (*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  | 1630            | 0.98%          |
| Pecca Group Bhd              | Interim           | 0.015       | 8/6/2026  | 1470            | 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  | 1840            | 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*

---

#### 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

---

**Disclaimer:** The report is for internal and private circulation only and shall not be reproduced either in part or otherwise without the prior written consent of Apex Securities Berhad. The opinions and information contained herein are based on available data believed to be reliable. It is not to be construed as an offer, invitation or solicitation to buy or sell the securities covered by this report.

Opinions, estimates and projections in this report constitute the current judgment of the author. They do not necessarily reflect the opinion of Apex Securities Berhad and are subject to change without notice. Apex Securities Berhad has no obligation to update, modify or amend this report or to otherwise notify a reader thereof in the event that any matter stated herein, or any opinion, projection, forecast or estimate set forth herein, changes or subsequently becomes inaccurate.

Apex Securities Berhad does not warrant the accuracy of anything stated herein in any manner whatsoever and no reliance upon such statement by anyone shall give rise to any claim whatsoever against Apex Securities Berhad. Apex Securities Berhad may from time to time have an interest in the company mentioned by this report. This report may not be reproduced, copied or circulated without the prior written approval of Apex Securities Berhad.

As of **Friday, 12 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.

---