

## Research Team

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## Market Scorecard

Global Markets	Close	Change	5-Day Trend
Dow Jones	51,671.03	0.92%	
S&P 500	7,554.29	1.65%	
Nasdaq	26,683.94	3.07%	
FTSE 100	10,430.62	-0.89%	
STOXX Europe 600	634.44	0.19%	
Nikkei 225	69,317.50	4.99%	
Shanghai Composite	4,096.47	1.81%	
Shenzhen	15,531.11	3.79%	
Hang Seng	24,842.67	0.50%	
KOSPI	8,545.98	5.20%	
SET	1,591.72	-0.04%	
STI	5,077.29	1.02%	
JCI	6,254.97	4.12%	
<b>Malaysia Markets</b>			
FBM KLCI	1,691.39	0.46%	
FBM Top 100	12,394.71	0.84%	
FBM Small Cap	15,500.39	1.87%	
FBM ACE	4,751.87	1.78%	
<b>Bursa Sector Performance</b>			
Consumer	492.17	1.17%	
Industrial Products	189.64	-3.70%	
Construction	282.48	1.44%	
Technology	74.98	4.90%	
Finance	19,991.36	1.77%	
Property	1,121.70	0.33%	
Plantation	8,729.02	-0.26%	
REIT	919.49	0.12%	
Energy	760.46	-1.32%	
Healthcare	1,546.26	-3.19%	
Telecommunications & Media	409.76	1.11%	
Transportation & Logistics	1,013.60	-0.14%	
Utilities	1,720.91	1.77%	
<b>Trading Activities</b>			
Trading Volume (m)	5,026.99	73.0%	
Trading Value (RM m)	3,914.03	68.0%	
<b>Trading Participants</b>			
<b>Change</b>			
Local Institution	173.04	43.26%	
Retail	-185.72	28.96%	
Foreign	12.68	27.79%	
<b>Market Breadth</b>			
<b>No. of stocks</b>			
<b>5-Day Trend</b>			
Advancers	804	63.0%	
Decliners	472	37.0%	
<b>Commodities</b>			
FKLI (Futures)	1,699.50	0.59%	
3M CPO (Futures)	4,485.00	-0.55%	
Brent Oil (USD/bbl)	83.36	-3.96%	
Gold (USD/oz)	4,311.45	2.82%	
<b>Forex</b>			
USD/MYR	4.0505	-0.18%	
SGD/MYR	3.1599	-0.08%	
CNY/MYR	0.5994	-0.10%	
JPY/MYR	2.5298	-0.11%	
EUR/MYR	4.7014	0.11%	
GBP/MYR	5.4387	-0.17%	

Source: Bloomberg, Apex Securities

## Lower Oil, Higher Equities

**Malaysian Market Review.** The FBM KLCI rose 0.46% to 1,691.39 on Monday, extending its gains for a fourth consecutive session in line with stronger regional markets amid improving global sentiment. Market breadth turned positive, with 804 advancers against 472 decliners. Sector-wise, Technology (+4.90%), Financial Services (+1.77%) and Construction (+1.44%) led gains, while Industrial Products & Services (-3.70%), Healthcare (-3.19%) and Energy (-1.92%) were the main laggards.

**Global Markets:** U.S. equities surged on Monday, with the Nasdaq (+3.07%), S&P 500 (+1.65%) and Dow Jones (+0.92%) advancing after President Donald Trump announced a ceasefire agreement with Iran, easing geopolitical concerns. Sentiment was further supported by a 4.9% decline in WTI crude oil prices to USD80.75/bbl following the reopening of the Strait of Hormuz, while SpaceX jumped nearly 20%, extending gains from its recent market debut. In Europe, the STOXX 600 gained 0.19%, supported by easing geopolitical concerns. Meanwhile, Asian markets closed broadly higher, led by the Kospi (+5.20%), Nikkei 225 (+4.99%), JCI (+4.12%) and Shenzhen (+3.79%), tracking Wall Street's rally amid optimism over improving Middle East tensions and a more stable oil supply outlook. (Yahoo Finance)

**Market Outlook.** We expect sentiment to remain positive in the near term, supported by easing geopolitical tensions following reports that the U.S.-Iran agreement has been electronically signed ahead of a formal ceremony this Friday. The reopening of the Strait of Hormuz and lower oil prices should help ease inflation concerns and support global risk appetite. Nevertheless, investors are likely to remain cautious ahead of the FOMC meeting, while continuing to monitor developments surrounding the agreement and the G7 summit.

**Sector focus.** We favour Technology, Construction and selected Financial Services stocks as easing geopolitical tensions and lower oil prices support risk sentiment. Meanwhile, Energy counters may underperform in the near term following the sharp correction in crude oil prices.

## FBMKLCI Technical Outlook

research\_dept created with TradingView.com, Jun 16, 2026 07:24 UTC+8



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 marks.

## Company News

**Astro Malaysia Holdings Bhd** flagged another tough year as the pay-television operator ramps up efforts to stem subscriber losses after a bruising quarter. *(The Edge)*

**Poh Kong Holdings Bhd** delivered its strongest quarterly performance since its listing in 2004, with both revenue and profit hitting record highs, underpinned by elevated gold prices and resilient demand. *(The Edge)*

**Vantris Energy Bhd**, formerly known as Sapura Energy Bhd, remained in the black for a second consecutive quarter ahead of its application for upliftment from PN17 status. *(The Edge)*

**PETRONAS Chemicals Group Bhd** was hit with suspension of IDSS after its share price retreated to a three-month low as investors booked profits following news of the US-Iran peace deal. *(The Edge)*

Describing the scale of the decline in its share price since June 8 as odd, Tanco also assured shareholders that its business operations, property development and contractual obligations remain unaffected. *(The Edge)*

IJM Land Bhd, a subsidiary of **IJM Corp Bhd**, is in a collaboration with MRT Corp Sdn Bhd to jointly develop a transit-oriented development named The Linque adjacent to the MRT Cochrane station in Cheras, Kuala Lumpur. *(The Edge)*

**Kerjaya Prospek Group Bhd** has secured a RM529.32 million contract from BRDB Developments Sdn Bhd for a high-end residential development in Bukit Tunku. *(The Edge)*

**Taghill Holdings Bhd** has secured a RM133 million contract from a unit of Exsim Group to build serviced apartments in Kwasa Damansara, Sungai Buloh. *(The Edge)*

**Powerwell Holdings Bhd** and its wholly-owned subsidiary Kejuruteraan Powerwell Sdn Bhd have secured a RM158.8 million contract, its largest to date, to supply and deliver low-voltage switchboards for an undisclosed international contractor. *(The Edge)*

Loss-making property developer **Country Heights Holdings Bhd** is searching for a new CEO after Mohd Rizal Zubair resigned from the position barely two months after taking the helm to pursue personal interests. *(The Edge)*

## Weekly Corporate Actions

Company	Corporate Actions	Entitlement	Ex-Date	Last Price (RM)	Dividend Yield
Petronas Dagangan Bhd	Interim	0.180	15/6/2026	18.200	0.99%
AmmB Holdings Bhd	Final	0.225	15/6/2026	6.570	3.42%
Nationgate Holdings Bhd	Interim	0.003	15/6/2026	0.760	0.33%
Amway Malaysia Holdings Bhd	Interim	0.050	15/6/2026	4.730	1.06%
New Hoong Fatt Holdings Bhd	Interim	0.010	15/6/2026	1.290	0.78%
Mclean Technologies Bhd	Interim	0.004	15/6/2026	0.685	0.58%
Aurelius Technologies Bhd	Interim	0.007	16/6/2026	0.670	0.97%
Fm Global Logistics Holdings	Interim	0.010	16/6/2026	0.595	1.68%
United U-Li Corp Bhd	Interim	0.020	16/6/2026	1.430	1.40%
Slp Resources Bhd	Interim	0.010	16/6/2026	0.830	1.20%
Sds Group Bhd	Interim	0.010	16/6/2026	0.390	2.56%
George Kent (Malaysia) Bhd	Interim	0.008	16/6/2026	0.280	2.68%
Negri Sembilan Oil Palms Bhd	Special Cash	0.030	16/6/2026	5.230	0.57%
Negri Sembilan Oil Palms Bhd	Interim	0.020	16/6/2026	5.230	0.38%
Tpc Plus Bhd	Interim	0.005	16/6/2026	0.290	1.72%
Muar Ban Lee Group Bhd	Interim	0.005	16/6/2026	0.345	1.45%
Guan Chong Bhd	Interim	0.015	18/6/2026	1.010	1.49%
Hibiscus Petroleum Bhd	Interim	0.030	18/6/2026	2.010	1.49%
Matrix Concepts Holdings Bhd	Interim	0.013	18/6/2026	1.200	1.04%
Ame Elite Consortium Bhd	Special Cash	0.030	18/6/2026	1.500	2.00%
Ame Elite Consortium Bhd	Interim	0.040	18/6/2026	1.500	2.67%
Power Root Bhd	Interim	0.004	18/6/2026	0.240	1.46%
Csc Steel Holdings Bhd	Final	0.141	18/6/2026	1.450	9.72%
Eita Resources Bhd	Interim	0.010	18/6/2026	0.570	1.75%
Tashin Holdings Bhd	Final	0.005	18/6/2026	0.200	2.50%
Mobilia Holdings Bhd	Interim	0.005	18/6/2026	0.100	5.00%
Resintech Bhd	Interim	0.020	18/6/2026	0.465	4.30%
Smis Corp Bhd	Final	0.020	18/6/2026	0.560	3.57%
Mbm Resources Berhad	Final	0.210	19/6/2026	5.090	4.13%
Petron Malaysia Refining & M	Final	0.200	19/6/2026	3.950	5.06%

Source: Bloomberg, Apex Securities

## Weekly Economic Highlights

Date	Country	Key Events
Monday, 15 June, 2026	EU	Trade Balance
	EU	Industrial Production
	US	Industrial Production
Tuesday, 16 June, 2026	CN	Industrial Production
	CN	Retail Sales
	CN	Fixed Asset Investment
	JP	BOJ Interest Rate Decision
Wednesday, 17 June, 2026	EU	ZEW Economic Sentiment Index
	JP	Trade Balance
	JP	Machinery Orders
Thursday, 18 June, 2026	UK	Inflation Rate
	US	Retail Sales
	US	Pending Home Sales
	US	Federal Reserve Interest Rate Decision
Friday, 19 June, 2026	UK	Unemployment Rate
	UK	Bank of England Interest Rate Decision
	US	Initial Jobless Claims
	US	Trade Balance
Friday, 19 June, 2026	MY	Inflation Rate
	JP	Inflation Rate
	UK	Retail Sales
	UK	Retail Sales

Source: TradingEconomics, Apex Securities

## Top Active Stocks by Market Participants

LOCAL			FOREIGN		
Stocks	Value (RM)	Price (RM)	Stocks	Value (RM)	Price (RM)
PCHEM	275,310,663.70	4.520	PCHEM	166,545,154.00	4.520
PMETAL	269,842,818.12	8.400	CIMB	130,677,874.40	7.690
PBBANK	152,707,925.36	4.920	MAYBANK	125,710,629.04	10.920
AAX	146,883,875.52	1.310	PMETAL	90,041,706.00	8.400
MAYBANK	108,764,829.84	10.920	TENAGA	82,199,043.82	14.480
ZETRIX	96,083,732.48	0.810	TOPGLOV	71,202,413.23	0.780
INARI	86,753,314.78	2.290	SDG	65,602,846.00	6.010
CIMB	85,128,401.52	7.690	ZETRIX	54,534,707.00	0.810
IHH	74,685,978.02	8.690	VITROX	53,684,465.00	7.490
TENAGA	69,715,371.34	14.480	IHH	48,857,170.00	8.690

RETAIL			INSTITUTION		
Stocks	Value (RM)	Price (RM)	Stocks	Value (RM)	Price (RM)
AAX	111,371,685.52	1.310	PCHEM	383,799,423.00	4.520
ZETRIX	93,276,988.98	0.810	PMETAL	328,695,950.06	8.400
PCHEM	58,056,394.70	4.520	MAYBANK	210,443,167.54	10.920
TANCO	54,429,422.34	0.130	CIMB	172,861,730.78	7.690
PENTECH	47,688,057.70	0.260	PBBANK	171,854,666.40	4.920
CIMB	42,944,545.14	7.690	TENAGA	138,542,722.94	14.480
INARI	39,046,291.46	2.290	IHH	122,426,289.01	8.690
YTL	36,905,743.02	2.070	SDG	107,186,450.00	6.010
DNEX	31,373,738.50	0.400	TM	98,750,606.70	7.350
PMETAL	31,188,574.06	8.400	TOPGLOV	91,965,003.00	0.780

Source: Dibots, Apex Securities

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#### 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.

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#### 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

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As of **Tuesday, 16 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.

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