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Market Scorecard

Global Markets	Close	Change	5-Day Trend
Dow Jones	52,182.74	+0.59%	
S&P 500	7,440.43	+1.18%	
Nasdaq	25,820.14	+2.07%	
FTSE 100	10,484.22	-0.23%	
STOXX Europe 600	636.11	+0.04%	
Nikkei 225	69,468.11	+0.15%	
Shanghai Composite	4,073.90	+1.16%	
Shenzhen	15,812.87	+0.19%	
Hang Seng	23,026.68	+1.57%	
KOSPI	8,394.65	-0.20%	
SET	1,577.81	+2.30%	
STI	5,208.75	+0.33%	
JCI	5,820.79	-1.28%	

Malaysia Markets	Close	Change	5-Day Trend
FBM KLCI	1,665.91	-1.11%	
FBM Top 100	12,213.09	+0.09%	
FBM Small Cap	15,335.22	+0.48%	
FBM ACE	4,789.29	+0.93%	

Bursa Sector Performance	Close	Change	5-Day Trend
Consumer	492.16	0.00%	
Industrial Products	181.37	+0.99%	
Construction	280.27	+2.25%	
Technology	73.83	+2.41%	
Finance	19,673.03	+0.05%	
Property	1,106.56	+0.61%	
Plantation	8,825.64	+0.65%	
REIT	918.17	-0.06%	
Energy	747.50	+0.21%	
Healthcare	1,483.25	+0.02%	
Telecommunications & Media	406.94	+0.19%	
Transportation & Logistics	990.41	+0.56%	
Utilities	1,688.46	+0.63%	

Trading Activities	Value	Change
Trading Volume (m)	2,711.86	-7.7%
Trading Value (RM m)	2,138.01	-5.5%

Trading Participants	Change
Local Institution	8.61 36.91%
Retail	-64.02 29.13%
Foreign	55.41 33.96%

Market Breadth	No. of stocks	5-Day Trend
Advancers	559 54.1%	
Decliners	475 45.9%	

Commodities	Close	Change	5-Day Trend
FKLI (Futures)	1,676.00	+0.39%	
3M CPO (Futures)	4,588.00	+0.50%	
Brent Oil (USD/bbl)	72.80	+0.38%	
Gold (USD/oz)	4,015.33	+0.27%	

Forex	Close	Change	5-Day Trend
USD/MYR	4.0708	-0.43%	
SGD/MYR	3.1467	-0.44%	
CNY/MYR	0.6012	-0.34%	
JPY/MYR	2.5150	-0.50%	
EUR/MYR	4.6421	-0.47%	
GBP/MYR	5.3819	-0.44%	

Source: Bloomberg, Apex Securities

Tech leads regional rebound

Malaysian Market Review. The FBM KLCI edged 0.11% lower to 1,665.91 on Monday, slipping marginally even as the broader market firmed and most regional markets advanced. Market breadth turned positive, with 559 advancers against 475 decliners. Foreign Investors returned as net buyers, bucking the trend of a selling streak. Sector-wise, Technology (+2.41%) rebounded to lead the gainers, followed by Industrial Products & Services (+0.99%) and Utilities (+0.63%), while Plantation (-0.65%) and Transportation & Logistics (-0.56%) were the main laggards.

Global Markets: U.S. equities rebounded on Monday, with the Nasdaq Composite (+2.07%) leading the gains as technology and semiconductor stocks recovered from the prior week's sell-off, led by names such as Applied Materials and KLA. The S&P 500 (+1.18%) and Dow Jones Industrial Average (+0.59%) also advanced, with the latter closing above 5,200 for the first time, helped by Alphabet's near 5% jump on its debut as a Dow component. The recovery in risk appetite extended across most of Asia, where Hong Kong's Hang Seng Index (+1.57%), the Shanghai Composite (+1.16%) and Thailand's SET (+2.30%) closed higher, although South Korea's KOSPI (-0.20%) and Indonesia's JCI (-1.28%) bucked the trend. European markets were mixed, with the STOXX Europe 600 (+0.04%) little changed and the FTSE 100 (-0.23%) edging lower as investors weighed the prospects of a lasting resolution to the US-Iran conflict as talks resume today (CNBC).

Market Outlook. Market sentiment may stay cautious in the near term even as risk appetite improves, with Monday's rebound in technology and semiconductor counters suggesting the recent sell-off in AI hardware was largely profit-taking rather than a shift in the structural demand outlook. Domestically, Malaysia's growing role as a regional AI infrastructure hub, resilient investment activity and Bank Negara Malaysia's measures to support the ringgit should continue to underpin sentiment, with the return of foreign buying a tentative positive, although political uncertainty ahead of the general election may cap near-term upside.

Sector focus. Technology, the top-performing sector on Monday, could extend its rebound if the recovery in global semiconductor and AI-related names holds, supporting Bursa-listed chip and EMS counters. Financial Services could remain resilient on solid fundamentals despite near-term political uncertainties. The transportation & logistics sector could benefit from easing fuel costs if crude oil prices remain subdued, with aviation counters set to benefit most, while Energy-related counters may continue to face selling pressure amid softer oil prices.

FBMKLCI Technical Outlook



TradingView

Source: TradingView, Apex Securities

Technical Commentary: The FBM KLCI continues to trade below the neckline of its Double Top pattern, closing Monday at 1,665.91 below all of its key moving averages, with the 9-, 20- and 120-day EMAs at 1,680-1,693 and the 200-day SMA at 1,674, keeping near-term momentum to the downside. A sustained close below the 1,680 neckline would expose the next support in the 1,640-1,620 zone. Immediate resistance is seen at the 200-day SMA of 1,674 and the 1,680 neckline, followed by the 1,689-1,693 EMA cluster. The cautious tone continues to reflect broader concerns surrounding the upcoming election cycle.

Company News

Jati Tinggi Group Bhd secured an RM86 million contract to deliver engineering services for a high-voltage transmission project at the Klang Valley Technology Park in Kapar, Selangor. (*The Edge*)

Berjaya Property Bhd acquired a 29% equity interest in Manjaran Sdn Bhd for RM57.9 million to participate in the Perlis Maritime Corridor (PMC). (*The Edge*)

PMW International Bhd secured an RM11.84 million contract to supply concrete poles for phase two of Malaysia's fibre-optics hub project, running until Oct 31. (*The Edge*)

HI Mobility Bhd posted a record 1QFY2026 net profit of RM16.31 million (up 13.5% year-on-year) and declared a one-sen interim dividend. This surge is driven by strong bus ridership and a newly acquired commercial vehicle business. (*The Edge*)

Kim Loong Resources Bhd reported a 31.6% rise in 1QFY2027 net profit to RM55.18 million, driven by stronger milling margins, effectively offsetting lower plantation output. (*The Edge*)

Crescendo Corporation Bhd reported a sharp surge in 1QFY2027 net profit to RM135.74 million, up from RM5.2 million a year earlier, driven by data centre-linked land sales in Johor's Bandar Cemerlang Industrial Park (BCIP). (*The Edge*)

Cypark Resources Bhd remained loss-making for a fourth straight quarter, posting a 4QFY2026 net loss of RM16.83 million as elevated finance costs, administrative expenses and depreciation offset stronger renewable energy output. (*The Edge*)

Apollo Food Holdings Bhd posted record FY2026 revenue of RM311.21 million, its highest since listing. However, net profit fell 14.2% to RM34.49 million, weighed by higher personnel, advertising and transport costs. (*The Edge*)

Superton Holdings Bhd posted a 48.8% jump in 4QFY2026 net profit to RM3.25 million, boosted by margin improvements and lower material costs, despite slight dip in revenue. (*The Edge*)

Hibiscus Petroleum Bhd has begun operating a low-pressure compressor at its Block B Maharajalela Jamalulalam field in Brunei, with gains expected to strengthen 4QFY2026 performance. (*The Edge*)

Insights Analytics Bhd has signed an MOU with Australia's Pipeline Inspection and Assessment Pty Ltd (PIA) to be the exclusive distributor of its pipeline inspection and condition assessment solutions in Malaysia. (*The Edge*)

Ajinomoto (Malaysia) Bhd has appointed Maybank Investment Bank Bhd and RHB Investment Bank Bhd as advisers in its proposed privatization by its Japanese parent company. (*The Edge*)

Lianson Fleet Group Bhd plans to dispose three ageing offshore support vessels (OSVs) this year and acquire two dry bulk vessels under its fleet optimisation strategy to expand its marine transportation business. (*The Edge*)

Favelle Favco Bhd's wholly-owned US unit, Favelle Favco Cranes Inc (FFC USA), is facing a US\$25 million (RM101.78 million) lawsuit in New York over a crane incident. Filed on June 24 by Justin Santiago alleging injuries and losses from a July 2023 crane fire and partial collapse in Manhattan. The company maintains it only supplied the crane and an independent report did not fault the manufacturer. (*The Edge*)

Weekly Corporate Actions

Company	Corporate Actions	Entitlement	Ex-Date	Last Price (RM)	Dividend Yield
Ijm Corp Bhd	Special Cash	0.010	29/6/2026	2.280	0.44%
Ijm Corp Bhd	Interim	0.050	29/6/2026	2.280	2.19%
Vitrox Corp Bhd	Final	0.012	29/6/2026	7.260	0.16%
Oriental Holdings Berhad	Final	0.200	29/6/2026	7.030	2.84%
Sports Toto Bhd	Interim	0.030	29/6/2026	13.10	2.29%
Supercomnet Technologies Bhd	Final	0.010	29/6/2026	0.415	2.41%
Thong Guan Industries Bhd	Interim	0.025	29/6/2026	14.90	1.68%
Rgb International Bhd	Interim	0.002	29/6/2026	0.215	0.93%
Jcbnext Bhd	Final	0.073	29/6/2026	1.800	4.03%
Leon Fuat Bhd	Final	0.010	29/6/2026	0.365	2.74%
Trc Synergy Bhd	Final	0.009	29/6/2026	0.280	3.21%
Tek Seng Holdings Bhd	Final	0.015	29/6/2026	0.250	6.00%
Teck Guan Perdana Bhd	Final	0.070	29/6/2026	1.870	3.74%
Kelington Group Bhd	Interim	0.030	30/6/2026	7.810	0.38%
Signature International Bhd	Interim	0.018	30/6/2026	1.360	1.29%
Chin Hin Group Property Bhd	Interim	0.010	30/6/2026	1.070	0.93%
Ajiya Bhd	Interim	0.020	30/6/2026	1.030	1.94%
Aeon Credit Service M Bhd	Special Cash	0.020	1/7/2026	5.780	0.35%
Aeon Credit Service M Bhd	Final	0.158	1/7/2026	5.780	2.72%
Far East Holdings Bhd	Special Cash	0.030	1/7/2026	4.080	0.74%
Far East Holdings Bhd	Final	0.120	1/7/2026	4.080	2.94%
Suria Capital Holdings Bhd	Final	0.015	1/7/2026	0.240	6.25%
Pba Holdings Bhd	Final	0.028	1/7/2026	1.990	1.38%
Eco World Development Group	Interim	0.020	2/7/2026	2.150	0.93%
Skyworld Development Bhd	Final	0.004	2/7/2026	0.410	0.93%
Kimlun Corp Bhd	Final	0.040	2/7/2026	0.990	4.04%
Lysaght Galvanized Steel Bhd	Final	0.070	2/7/2026	2.460	2.85%
Sapura Industrial Bhd	Final	0.040	3/7/2026	0.805	4.97%

Source: Bloomberg, Apex Securities

Weekly Economic Highlights

Date	Country	Key Events
Tuesday, 30 June, 2026	JP	Unemployment Rate
	JP	Industrial Production (Preliminary)
	EU	ECB President Lagarde Speech
	CN	NBS Manufacturing PMI
	CN	NBS Non-Manufacturing PMI
	US	JOLTs Job Openings
Wednesday, 1 July, 2026	US	CB Consumer Confidence
	CN	RatingDog Manufacturing PMI
	EU	Inflation Rate (Flash)
Thursday, 2 July, 2026	US	ISM Manufacturing PMI
	EU	Unemployment Rate
	US	Non Farm Payrolls
	US	Unemployment Rate
Friday, 3 July, 2026	US	Initial Jobless Claims
	CN	RatingDog Services PMI

Source: TradingEconomics, Apex Securities

Top Active Stocks by Market Participants

LOCAL			FOREIGN		
Stocks	Value (RM)	Price (RM)	Stocks	Value (RM)	Price (RM)
PMETAL	111,630,224.46	7.780	PMETAL	92,757,668.00	7.780
ZETRIX	99,964,903.05	0.760	IHH	86,669,515.78	8.400
MAYBANK	53,240,639.96	10.800	ZETRIX	72,279,452.06	0.760
SDG	52,175,244.07	5.960	CIMB	70,148,814.58	7.450
PBBANK	49,244,599.69	4.790	MAYBANK	61,159,527.48	10.800
CIMB	41,884,373.78	7.450	PBBANK	60,452,977.49	4.790
IHH	41,702,225.08	8.400	RHBBANK	42,462,793.38	8.320
YTLPOWR	38,933,148.34	4.210	TM	38,640,644.92	7.430
AMBANK	37,639,801.16	6.540	TENAGA	36,082,847.44	14.260
KGB	37,578,164.52	7.930	SUNCON	34,833,486.00	7.400

RETAIL			INSTITUTION		
Stocks	Value (RM)	Price (RM)	Stocks	Value (RM)	Price (RM)
ZETRIX	95,634,820.55	0.760	PMETAL	190,747,941.00	7.780
CIMB	30,860,631.78	7.450	IHH	127,462,461.78	8.400
NATGATE	30,854,162.00	0.865	MAYBANK	99,741,770.60	10.800
AAX	26,492,153.38	1.210	PBBANK	96,719,683.38	4.790
YTLPOWR	26,192,830.46	4.210	CIMB	81,172,556.58	7.450
CGB	24,241,239.00	0.890	SDG	80,356,731.81	5.960
SCGBHD	21,259,454.00	2.350	ZETRIX	76,609,534.56	0.760
SKYECHIP	21,229,905.74	2.960	TM	73,369,608.92	7.430
INARI	16,515,073.54	2.250	TENAGA	68,977,627.44	14.260
HEXTAR	15,010,235.36	0.780	AMBANK	60,344,186.00	6.540

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

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(a) nil.
