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Market Scorecard

Global Markets	Close	Change	5-Day Trend
Dow Jones	52,319.20	0.26%	
S&P 500	7,499.36	0.79%	
Nasdaq	26,213.72	1.52%	
FTSE 100	10,497.12	0.22%	
STOXX Europe 600	641.73	0.88%	
Nikkei 225	70,062.32	0.86%	
Shanghai Composite	4,094.40	0.00%	
Shenzhen	16,205.56	2.48%	
Hang Seng	22,881.02	-0.63%	
KOSPI	8,476.48	0.97%	
SET	1,591.24	0.85%	
STI	5,170.65	-0.73%	
JCI	5,643.19	-3.05%	
Malaysia Markets			
FBM KLCI	1,664.06	-0.11%	
FBM Top 100	12,215.04	0.22%	
FBM Small Cap	15,396.27	0.10%	
FBM ACE	4,823.43	0.71%	
Bursa Sector Performance			
Consumer	492.75	0.22%	
Industrial Products	180.63	-0.41%	
Construction	285.26	1.28%	
Technology	74.58	1.02%	
Finance	19,610.66	-0.32%	
Property	1,113.21	0.60%	
Plantation	8,854.77	0.33%	
REIT	926.12	0.77%	
Energy	751.64	0.55%	
Healthcare	1,480.05	-0.22%	
Telecommunications & Media	405.96	-0.24%	
Transportation & Logistics	997.79	0.75%	
Utilities	1,695.03	0.89%	
Trading Activities			
Trading Volume (m)	2,911.00	7.3%	
Trading Value (RM m)	2,775.31	29.8%	
Trading Participants			
Local Institution	198.79	36.45%	
Retail	-15.80	22.89%	
Foreign	-182.99	40.66%	
Market Breadth			
	No. of stocks		5-Day Trend
Advancers	565	57.7%	
Decliners	414	42.3%	
Commodities			
FKLI (Futures)	1,670.50	-0.33%	
3M CPO (Futures)	4,546.00	-0.87%	
Brent Oil (USD/bbl)	72.92	0.13%	
Gold (USD/oz)	4,015.49	-0.17%	
Forex			
USD/MYR	4.0848	0.44%	
SGD/MYR	3.1554	0.28%	
CNY/MYR	0.6019	0.79%	
JPY/MYR	2.5166	0.16%	
EUR/MYR	4.6556	0.29%	
GBP/MYR	5.4058	0.44%	

Source: Bloomberg, Apex Securities

Benchmark lags as broad market firms

Malaysian Market Review. The FBM KLCI slipped 0.11% lower to 1,664.06 on Tuesday, a second straight marginal decline, even as the broader market and most sectors closed higher. The benchmark's underperformance was largely down to profit-taking in Finance (-0.32%), its heaviest sector weighting, which offset firmer showings elsewhere. Construction (+1.78%) led the gainers, followed by Technology (+1.02%) and REITs (+0.87%), while Industrial Products & Services (-0.41%) joined Finance among the laggards. Market breadth remained positive, with 565 advancers against 414 decliners, with the FBM Small Cap (+0.40%) and ACE Market (+0.71%) outpacing the benchmark. However, foreign investors swung back to net selling of RM183.0 million after a single session of buying, with local institutions (+RM198.8 million) absorbing the outflow.

Global Markets: U.S. equities advanced on Tuesday to close out their strongest quarter in six years, with the Nasdaq Composite (+1.52%) again leading as the technology and semiconductor rally extended into quarter-end. The S&P 500 (+0.79%) and Dow Jones Industrial Average (+0.26%) also gained, the latter capping its best first half in five years. A softer-than-expected consumer confidence reading, alongside signs of a cooling labour market, kept investors focused on the U.S. payrolls data due later in the week. European markets closed broadly higher, with the STOXX Europe 600 (+0.88%) lifted by technology names, while Asia was mixed: Japan's Nikkei 225 (+0.86%) and South Korea's KOSPI (+0.97%) rose, but Hong Kong's Hang Seng Index (-0.63%) slipped and Indonesia's JCI (-3.05%) extended its sharp slide (CNBC).

Market Outlook. With a strong quarter now in the books, attention shifts squarely to the U.S. labour market in a holiday-shortened week, where Wednesday's ISM manufacturing survey and Thursday's non-farm payrolls will test the durability of the rate-cut narrative that has underpinned the recent risk-on move. Softening confidence and hiring signals leave the data finely balanced: a weak print could embolden expectations of Fed easing, while resilience would challenge the rally's momentum. Locally, the persistent split between a lagging large-cap benchmark and a firmer broad market suggests opportunities remain stock- and sector-specific rather than index-driven, though the swing back to foreign net selling and a softer ringgit are reminders that external flows stay fickle.

Sector focus. Technology stays the sector to watch, with Bursa-listed chip and EMS tracking the global semiconductor trade and their direction tied to this week's US jobs data. Construction could stay in favour as high-tech facility and infrastructure contracts continue to flow. REITs should retain a defensive bid if softer data revives rate-cut hopes, while the banks must be steady for the index to close its gap to the broader market.

FBMKLCI Technical Outlook

research_dept created with TradingView.com, Jun 30, 2026 22:59 UTC-8



TradingView

Source: TradingView, Apex Securities

Technical Commentary: The FBM KLCI extended its decline to 1,664.06, consolidating below the neckline of its Double Top pattern. The moving averages remain stacked bearishly above price, with the 9-, 20- and 120-day EMAs at 1,676-1,693 over the 200-day SMA at 1,675. The continued failure to reclaim the neckline points to a lack of buying conviction while the index stays pinned beneath the 1,680 neckline. The 1,640-1,620 zone remains the downside reference, as only a close back above the 1,680 band would begin to neutralise the bearish setup.

Company News

Carimin Petroleum Bhd's proposed privatisation of **Sealink International Bhd** at 41 sen per share has lapsed after a major shareholder blocked the exercise, prompting the board to abandon the scheme. *(The Edge)*

Critical Holdings Bhd has secured a RM772.49 EPC contract to develop a high-technology industrial facility for a US-based wafer fabrication multinational company at Kulim Hi-Tech Park. *(The Edge)*

Exsim Hospitality Bhd was awarded a RM66.81 million related party contract by Dynamicz Sdn Bhd to undertake demolition and architectural works at a Damansara Perdana development. *(The Edge)*

SNS Network Technology Bhd posted a 73.6% drop in first-quarter net profit as revenue nearly halved, impacted by product delivery timing and higher cost base from last year's large commercial orders. *(The Edge)*

MM Computer Systems Bhd secured two contracts worth RM24.54 million for server and network maintenance support from an undisclosed GLC. *(The Edge)*

Globaltec Formation Bhd said its 70%-owned unit, NuEnergy Gas Ltd, has signed a US\$88 million (RM358.16 million) contract with PT Beijing Energy Linking (PT BEL) to advance its coal bed methane project in Indonesia, with PT BEL recovering capital costs from future gas sales. *(The Edge)*

Malayan Banking Bhd announced that its subsidiary, PT Bank Maybank Indonesia Tbk, has secured shareholder approval to serve as the operational financial conglomerate holding company for the group's Indonesian businesses. *(The Edge)*

Heineken Malaysia Bhd has appointed Datuk Iain John Lo as chairman effective Aug 15, succeeding Datuk Seri Idris Jala after nine years on the board. *(The Edge)*

CTOS Digital Bhd has appointed Creador founder and CEO Brahmal Vasudevan, 57, as non-executive chairman effective July 1, succeeding Datuk Noorazman Abd Aziz. CTOS also named Datuk Iswaraan Suppiah, 62, former AmBank COO, as independent non-executive director. *(The Edge)*

Sunway Healthcare Holdings Bhd has promoted Dr Seow Vei Ken to chief medical director and appointed industry veteran Erica Lam as CEO of Sunway Medical Centre, Sunway City Kuala Lumpur, effective July 1. *(The Edge)*

Datuk Seri Chiau Beng Teik stepped down from the boards of 5 group linked companies (including **Chin Hin, Ajiya, and Fiamma**) as a part of the major family succession plan, passing the executive chairmanship to his son, Datuk Wira Chiau Haw Choon. *(The Edge)*

Puncak Niaga Holdings Bhd has appointed Azlan Shah Rozali, 40, son of founder Tan Sri Rozali Ismail, as chairman and president as Rozali retires as executive chairman transitioning to an advisory role. *(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	1.310	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	1.490	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	129,493,868.53	7.680	GAMUDA	184,550,163.19	4.370
MAYBANK	111,410,740.36	10.780	PMETAL	164,444,044.47	7.680
SDG	99,109,546.26	5.980	MAYBANK	158,052,870.80	10.780
GAMUDA	92,826,584.17	4.370	PBBANK	151,948,031.56	4.800
IHH	65,645,253.55	8.400	CIMB	144,202,595.37	7.410
CIMB	62,688,143.79	7.410	IHH	116,870,619.31	8.400
INARI	59,654,841.96	2.260	RHBBANK	94,125,303.44	8.280
ZETRIX	54,673,958.90	0.760	TENAGA	64,850,769.24	14.280
AMBANK	48,534,630.84	6.370	AMBANK	61,689,898.92	6.370
VITROX	48,470,980.00	7.760	SDG	58,333,593.66	5.980

RETAIL			INSTITUTION		
Stocks	Value (RM)	Price (RM)	Stocks	Value (RM)	Price (RM)
ZETRIX	52,825,471.20	0.760	PMETAL	283,721,176.47	7.680
INARI	27,128,150.96	2.260	GAMUDA	261,090,348.01	4.370
CGB	23,758,589.00	0.890	MAYBANK	250,767,721.76	10.780
NATGATE	22,605,233.00	0.890	CIMB	195,806,832.82	7.410
TANCO	21,711,357.27	0.175	IHH	181,766,467.31	8.400
LIFTECH	20,347,169.00	0.240	PBBANK	179,384,412.82	4.800
YTLPOWR	18,813,200.18	4.180	SDG	157,108,855.22	5.980
MAYBANK	18,695,889.40	10.780	TENAGA	108,920,451.24	14.280
SKYECHIP	18,533,159.26	2.950	AMBANK	107,367,527.92	6.370
GIIB	16,687,205.00	0.465	RHBBANK	98,611,147.50	8.280

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.
