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Market Scorecard

Global Markets	Close	Change	5-Day Trend
Dow Jones	54,085.88	1.71%	
S&P 500	7,736.52	1.79%	
Nasdaq	26,584.99	2.59%	
FTSE 100	10,879.38	0.20%	
STOXX Europe 600	656.86	0.73%	
Nikkei 225	63,957.53	0.32%	
Shanghai Composite	3,822.29	0.33%	
Shenzhen	13,885.71	3.25%	
Hang Seng	25,852.92	-0.60%	
KOSPI	6,358.95	1.62%	
SET	1,617.13	-0.29%	
STI	5,612.25	0.00%	
JCI	6,319.61	1.37%	
Malaysia Markets			
FBM KLCI	1,732.66	0.40%	
FBM Top 100	12,640.71	0.44%	
FBM Small Cap	15,798.10	0.52%	
FBM ACE	5,017.44	0.73%	
Bursa Sector Performance			
Consumer	499.75	-0.40%	
Industrial Products	188.68	0.74%	
Construction	288.65	0.37%	
Technology	75.63	1.02%	
Finance	20,519.19	0.40%	
Property	1,102.30	0.17%	
Plantation	9,377.31	0.78%	
REIT	916.85	-1.04%	
Energy	764.53	0.08%	
Healthcare	1,507.38	2.00%	
Telecommunications & Media	409.28	0.07%	
Transportation & Logistics	1,032.07	0.18%	
Utilities	1,645.32	-0.45%	
Trading Activities			
Trading Volume (m)	2,803.70	2.6%	
Trading Value (RM m)	2,818.47	20.5%	
Trading Participants	**Change**		
Local Institution	-53.24	38.59%	
Retail	73.00	30.09%	
Foreign	-19.76	31.32%	
Market Breadth	**No. of stocks**		**5-Day Trend**
Advancers	621	56.3%	
Decliners	482	43.7%	
Commodities			
FKLI (Futures)	1,732.00	0.26%	
3M CPO (Futures)	4,696.00	1.43%	
Brent Oil (USD/bbl)	78.68	-6.00%	
Gold (USD/oz)	4,077.06	0.11%	
Forex			
USD/MYR	4.0965	0.02%	
SGD/MYR	3.1916	-0.03%	
CNY/MYR	0.6067	0.04%	
JPY/MYR	2.5956	-0.61%	
EUR/MYR	4.7143	-0.10%	
GBP/MYR	5.5076	-0.02%	

Source: Bloomberg, Apex Securities

Records Roll on Wall Street, KLCI Rides Along

Malaysian Market Review. The FBM KLCI rose 0.40% to close at its intraday high of 1,732.66 on Tuesday, extending its winning streak to a fifth straight session as gains in technology and semiconductor counters, alongside broadly positive regional sentiment, lifted the benchmark. Market breadth was positive, with 621 advancers outpacing 482 decliners. Sector gains were led by Healthcare (+2.00%) and Technology (+1.02%), while REIT was the worst-performing sector, declining 1.04%.

Global Markets: US equities rallied to fresh records on Tuesday, with the S&P 500 climbing +1.79% to 7,736.52 and the Dow Jones adding +1.71% to 54,085.88, both closing at all-time highs, while the Nasdaq Composite surged +2.59% to 26,584.99 on robust second-quarter earnings and easing hopes for a reopening of the Strait of Hormuz. In Europe, the STOXX 600 rose +0.73% to 656.86, tracking the Wall Street lead and a rebound in oil prices. In Asia, South Korea's Kospi jumped +1.62% to 6,358.95, rebounding from an intraday drop after early weakness in Samsung Electronics and SK Hynix on competitive concerns from China's CXMT, as gains broadened into defense, shipbuilding and battery counters through the afternoon, while Japan's Nikkei 225 added +0.32% to 63,957.53. (CNBC).

Market Outlook. We expect the FBM KLCI to extend Tuesday's gains, underpinned by record closes on Wall Street and broadly positive regional market sentiment. Meanwhile, Brent crude tumbled more than 5% overnight to around US$79 per barrel following renewed optimism over U.S.-Iran negotiations and a potential reopening of the Strait of Hormuz, easing near-term supply concerns despite lingering geopolitical uncertainties. Investors will also focus on the upcoming U.S. ISM Services PMI and July non-farm payrolls for fresh signals on the Federal Reserve's policy outlook. Barring any significant deterioration in geopolitical conditions, we expect the local market to maintain its positive momentum.

Sector focus. We expect the Technology sector to remain in focus this week amid mixed regional semiconductor performance, while Energy and transport-related counters may benefit from lower crude oil prices following the easing of U.S.-Iran tensions. Financial Services could continue to draw support from improving market sentiment.

FBMKLCI Technical Outlook

Source: TradingView, Apex Securities

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Technical Commentary: The FBM KLCI closed at 1,732.66 on Tuesday, holding above its EMA9, EMA20, EMA120 and SMA200, indicating that the near-term bullish momentum remains intact and has strengthened following the session's gains. The index is now testing the 1,735 resistance level, with a decisive breakout above this level likely to reinforce buying interest and open the door to the 1,760–1,770 resistance zone. On the downside, 1,700 remains the immediate support, followed by 1,680 should profit-taking emerge.

Company News

MNRB Holdings Bhd is selling its takaful business, Takaful Ikhlas Family and Takaful Ikhlas General, to Bank Kerjasama Rakyat Malaysia Bhd (Bank Rakyat) for RM1.64 billion cash. *(The Edge)*

Hartalega Holdings Bhd's net profit for the first quarter ended June 30, 2026 (1QFY2027) rose six-fold year-on-year (y-o-y) to RM70.03 million, its highest quarterly earnings in four years. *(The Edge)*

Vantris Energy Bhd's units have secured RM830 million work orders from Petroliam Nasional Bhd's (PETRONAS) upstream arm to provide transportation, installation and tender-assisted drilling rig services in Malaysia**.** *(The Edge)*

Capital A Bhd's non-aviation businesses posted mixed operating performance in the second quarter. *(The Edge)*

K-One Technology Bhd is disposing of its cloud business arm G-AsiaPacific Sdn Bhd to Tokyo-listed ITOCHU Corp and its Singapore unit ITOCHU Singapore Pte Ltd for RM94 million**.** (*The Edge)*

SNS Network Technology Bhd said it expects to recognise revenue from its US$298.66 million (RM1.22 billion) contract for the supply of high-performance artificial intelligence (AI) servers to a Singapore-based customer in its current fiscal year. *(The Edge)*

GFM Services Bhd has secured an additional RM83.1 million for major turnaround works at the Pengerang Integrated Complex (PIC) in Johor *(The Edge)*

Formosa Prosonic Industries Bhd swung to a net profit of RM13.92 million for the second quarter ended June 30, 2026 (2QFY2026), compared to a net loss of RM819,000 a year earlier, on higher sales and forex gains *(The Edge)*

Vestland Bhd has proposed to raise up to RM60.44 million via a private placement of up to 10% of its enlarged share base to fund working capital for the construction firm's current as well as future projects. *(The Edge)*

Weekly Corporate Actions

Company	Corporate Actions	Entitlement	Ex-Date	Last Price (RM)	Dividend Yield
Gamuda Bhd	Interim	0.050	4/8/2026	4.270	1.17%
Igb Real Estate Investment T	Distribution	0.034	4/8/2026	2.750	1.25%
Igb Commercial Real Estate I	Distribution	0.014	4/8/2026	0.630	2.14%
Uoa Real Estate Investment	Distribution	0.039	4/8/2026	0.850	4.64%
Crest Builder Holdings Bhd	Final	0.020	5/8/2026	0.445	4.49%
Cyl Corp Bhd	Interim	0.005	5/8/2026	0.330	1.52%
Pavilion Real Estate Invest	Distribution	0.052	6/8/2026	1.780	2.90%
Ctos Digital Bhd	Interim	0.007	6/8/2026	0.705	0.99%
Ksl Holdings Bhd	Final	0.100	6/8/2026	2.900	3.45%
Citaglobal Bhd	Interim	0.010	6/8/2026	0.845	1.18%
Luxchem Corp Bhd	Interim	0.010	6/8/2026	0.430	2.33%
Kip Reit	Distribution	0.020	6/8/2026	0.870	2.33%
Kumpulan Fima Bhd	Special Cash	0.100	6/8/2026	2.790	3.58%
Kumpulan Fima Bhd	Interim	0.090	6/8/2026	2.790	3.23%
Gagasan Nadi Cergas Bhd	Bonus-Options	0.500	6/8/2026	0.355	140.85%
Ays Ventures Bhd	Final	0.010	6/8/2026	0.210	4.76%
Pasdec Holdings Bhd	Final	0.015	6/8/2026	0.295	5.08%
Scgm Bhd	Special Cash	0.250	6/8/2026	0.530	47.17%
Cb Industrial Product Hldg	Interim	0.020	7/8/2026	1.050	1.90%
Boustead Heavy Industries Co	Regular Cash	0.480	7/8/2026	0.475	101.05%

Source: Bloomberg, Apex Securities

Weekly Economic Highlights

Date	Country	Key Events
Monday, 3 August, 2026	CN	RatingDog Manufacturing PMI
	US	ISM Manufacturing PMI
Tuesday, 4 August, 2026	US	Balance of Trade
Wednesday, 5 August, 2026	CN	RatingDog Services PMI
	US	ISM Services PMI
Thursday, 6 August, 2026	EU	Retail Sales
	US	Initial Jobless Claims
Friday, 7 August, 2026	CN	Balance of Trade
	US	Non Farm Payrolls
	US	Unemployment Rate
Sunday, 9 August, 2026	CN	Inflation Rate
	CN	Producer Price Index

Source: TradingEconomics, Apex Securities

Top Active Stocks by Market Participants

LOCAL			FOREIGN		
Stocks	Value (RM)	Price (RM)	Stocks	Value (RM)	Price (RM)
MAYBANK	242,129,812.62	10.780	MAYBANK	373,807,503.06	10.780
AMBANK	170,126,289.20	7.120	PBBANK	145,615,036.28	5.280
PBBANK	103,739,211.54	5.280	TENAGA	92,801,736.38	14.500
JPG	79,092,909.00	2.100	RHBBANK	64,985,854.30	8.740
VITROX	75,903,427.84	8.750	WPRTS	64,270,769.00	7.140
MRDIY	74,516,865.08	1.520	CIMB	60,933,648.47	8.030
NATGATE	69,817,613.05	1.290	AMBANK	55,547,548.68	7.120
PENTA	61,043,806.00	5.290	PMETAL	53,491,161.52	8.060
ABMB	54,876,971.08	4.850	VITROX	47,287,983.00	8.750
CIMB	53,607,062.99	8.030	SDG	41,244,129.42	6.690

RETAIL			INSTITUTION		
Stocks	Value (RM)	Price (RM)	Stocks	Value (RM)	Price (RM)
MAYBANK	165,434,389.26	10.780	MAYBANK	450,502,926.42	10.780
NATGATE	58,763,687.30	1.290	AMBANK	210,842,039.68	7.120
ZETRIX	47,629,398.10	0.735	PBBANK	208,939,434.53	5.280
CGB	45,587,247.50	0.875	TENAGA	130,099,187.78	14.500
PBBANK	40,414,813.29	5.280	VITROX	109,392,170.00	8.750
MRDIY	39,846,165.08	1.520	WPRTS	97,408,256.00	7.140
STRATUS	38,447,424.72	2.310	RHBBANK	96,792,208.98	8.740
CIMB	26,765,326.38	8.030	JPG	88,466,423.00	2.100
MEGAFB	23,585,871.00	1.890	CIMB	87,775,385.08	8.030
SKYECHIP	23,390,370.88	3.010	PMETAL	70,413,305.52	8.060

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 **Wednesday, 05 Aug, 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.