MERCURY SECURITIES SDN BHD
(A Participating Organisation of Bursa Malaysia Securities Bhd.)

MARKET WATCH
Thursday, November 19, 2026
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Daily Newswatch

Market Review

The FBM KLCI fell 0.5% to close at 1,566.7 points on Wednesday, as selling pressure on selected heavyweights dragged the index lower, while the ringgit posted one of its steepest declines against the US dollar since mid-June. Plantation (-1.0%), Financial Services (-0.5%) and Industrial Products & Services (-0.4%) led sectoral losses, with Mr DIY (-3.9%), Press Metal Aluminium (-3.1%) and Petronas Chemicals (-2.3%) among the worst performers of the bourse. Market breadth however, was positive with gainers thumping losers 630 to 430, while 476 counters were unchanged.

Major Asian markets ended mostly higher on Wednesday, as US chipmaker Nvidia's stronger-than-expected results and guidance lifted chip stocks, though most markets pared early gains. South Korea's KOSPI rebounded 2.0% to reclaim 5,000 points, led by chip substrate maker Samsung Electro-Mechanics (+7.4%) on a new Nvidia supply deal, and memory chipmakers SK Hynix (+4.2%) and Samsung Electronics (+2.3%). Japan's Nikkei 225 edged up 0.3%, led by chip inspection equipment maker Lasertec (+5.0%) and tech investor SoftBank Group (+3.1%). Taiwan's TAIEX inched up 0.3%, supported by chip substrate maker Kinsus (+6.8%), while chipmaker TSMC (+0.2%) gave back most of its early gains. China's Shanghai Composite edged up 0.1%, snapping a four-session losing streak, led by computing power leasing and electronic components stocks. Conversely, Hong Kong's Hang Seng fell 0.9%, dragged by e-commerce giant JD.com (-7.2%) and online healthcare platform JD Health (-15.4%) after their results, though PC maker Lenovo (+4.5%) rebounded.

European stocks closed sharply lower for a fourth straight session on Wednesday, tracking global declines with all major sectors lower. The Euro STOXX 50 fell 0.9% to 6,156 and STOXX 600 dropped 1.0% to 644. Sentiment soured after Nvidia signalled more discipline in AI investments, scaling back its role as the sector's financial backstop. Software firm SAP (-4%) and tech investor Prosus (-5%) fell. Banks slumped on reports the ECB will raise reserve ratios, with UniCredit, ING and BNP Paribas down over 2% each, while Deutsche Bank extended its leak-driven slide to 10% this week. Chip toolmaker ASML rose 2%.

US stocks closed mostly lower on Wednesday as Nvidia's post-earnings rally faded, renewing a rotation away from AI stocks. The S&P 500 fell 0.2% and Dow 561 points, while Nasdaq CI rose 0.4%. AI chipmaker Nvidia (-2.9%) slipped despite strong results and guidance, as it signalled a more disciplined approach to investing in AI firms, curbing its role as an AI financial backstop, amid tighter export curbs. Memory chipmaker Micron (-1.0%) and flash storage maker SanDisk (-2.6%) fell, while rival chipmakers Broadcom (+3.6%) and AMD (+5.3%) gained. Fed minutes showed a large majority favour further hikes, weighing on banks and Treasuries.

Macro Snapshots

- **US:** Fed Likely to Raise Rates Again This Year
- **US:** Fed's Waller says Fed should consider half-point rate hike
- **CN:** Sets strongest yuan fixing since 2022 as Apec begins
- **MY:** OPR hike expectations in 2027 gain ground after strong 3Q GDP growth

Corporate Snapshots

- **GCB:** Sees another record quarter, expects strength to continue
- **BIPORT:** Exposed to Zetrix AI sukuk write-off in two ARIM funds
- **NORTHERN:** Plans RM43m private placement to fund DC solar projects
- **UEMS:** Declares special dividend as 3Q net profit more than doubles

Indices	Last Close	Daily chg %	YTD chg %
FBM KLCI	1,566.7	(0.5)	(6.7)
Dow Jones	50,198.2	(1.1)	4.4
Nasdaq CI	24,429.9	0.4	5.1
S&P 500	7,323.6	(0.2)	7.0
SX5E	6,154.4	(0.9)	6.3
FTSE 100	10,551.2	(1.3)	6.2
Nikkei 225	59,024.3	0.3	17.3
Shanghai CI	3,587.8	0.1	(9.6)
HSI	23,294.8	(0.9)	(9.1)
STI	5,054.9	(1.1)	8.8

Market Activities	Last Close	% Chg
Vol traded (m shares)	3,068.3	(28.0)
Value traded (RM m)	2,761.9	(22.6)
Gainers	630	
Losers	430	
Unchanged	476	

Top 5 Volume	Last Close	Daily chg %	Vol (m)
ZETRIX	0.055	(8.3)	261.9
MYDCD	0.580	28.9	117.3
MMAG	0.020	0.0	94.7
YTLP	4.000	(1.2)	44.7
MAG	1.180	0.9	0.7

Top 5 Turnover	Last Close	Daily chg %	Val (RM m)
YTLP	4.000	(1.2)	181.2
PBK	4.500	(1.3)	155.9
UPL	31.640	0.3	110.4
RHBBANK	7.630	0.0	110.8
MAY	9.920	(0.5)	106.6

Currencies	Last Close	Daily chg %
USD/MYR	4.115	0.0
USD/JPY	159.410	(0.0)
EUR/USD	1.097	(0.0)
USD/CNY	6.668	(0.0)
US Dollar Index	103.813	0.3

Commodities	Last Close	% Chg
Brent (USD/barrel)	92.0	(1.3)
Gold (USD/troy oz)	3,735.6	0.3
CPO (MYR/metric t)	4,158.0	(0.7)
Bitcoin (USD/BTC)	62,652.3	0.6

Source: Bloomberg

Macro News

US: Pending home sales fall to new record low on high rates

Pending sales of existing US homes fell to a new record low in October as high mortgage rates squeezed housing demand. An index of contract signings from the National Association of Realtors (NAR) dropped 4.7% last month to 63, its lowest reading since records began in 2001, according to data released on Wednesday. From a year earlier, pending home sales plummeted about 17%. The figures are the latest in a series of reports showing a US housing market burdened by high borrowing costs and home prices. *(Bloomberg)*

US: Housing starts climb on multi-family construction rebound

US homebuilders started more homes in October, driven largely by a rebound in apartment construction while the single-family market remained challenged by high mortgage rates. Housing starts increased 9.9% to an annualised rate of 1.31 million, the fastest in three months according to data released on Wednesday by the federal government. Economists surveyed by *Bloomberg* expected a 1.25 million pace, based on the median projection. *(Bloomberg)*

US: Fed Likely to Raise Rates Again This Year

Almost all Fed officials judged that, under their baseline outlooks for inflation and the labor market, further action to raise the federal funds rate would likely be appropriate, in order to ensure a timely return of inflation to the 2% objective, minutes form the October FOMC meeting showed. Also, a couple of participants noted that an increase of more than 25bps could warrant consideration at the next meeting if incoming inflation data were unfavorable. *(Federal Reserve)*

US: Fed's Waller says Fed should consider half-point rate hike

Federal Reserve governor Christopher Waller said on Wednesday that inflation remains headed in the wrong direction, urging the central bank to consider a larger, half-percentage-point rate hike at its December meeting. "We have to be a little more aggressive in our rate hikes to try to get inflation down," Waller said, speaking on Wednesday on CNBC. Fed officials left rates steady last month after raising their benchmark rate in September for the first time in three years. *(Bloomberg)*

US: Labour market shows signs of revival with rise in job postings

A broadening swathe of the US is seeing growth in job openings, suggesting the labour market could break free next year from the low-hire environment that has long frustrated job seekers, according to a new report from Glassdoor and Indeed. Nearly half of US metro areas had more job postings in late September than a year earlier, the highest share since 2022. That's up from just one in 10 metros at the start of the year. Postings were above pre-pandemic levels in 299 of 385 metro areas with at least 100,000 residents. *(Bloomberg)*

US: Trump says 'very big trade deal' concluded with Philippines

US President Donald Trump said on Wednesday that the US has just concluded a "very big trade deal" with the Philippines, but he did not provide any details, and Manila did not announce any agreement. "We have just consummated a very big trade deal, the biggest trade deal we have ever made so far, and it is a fair deal for both countries," Trump said during a state luncheon at the Philippine presidential palace. *(Reuters)*

US: Nvidia stops selling AI chips to China despite US approval

Nvidia Corp is no longer shipping Hopper data centre chips to China, despite winning the US government's blessing to sell a version of that model to the Asian nation last year. The world's leading artificial intelligence (AI) chip supplier sold US$2.4 billion (RM9.8 billion) worth of licensed, Hopper data centre products to China in the third quarter, Colette Kress, Nvidia's interim chief executive officer, said during an earnings call with analysts on Tuesday. *(Bloomberg)*

CN: Indonesia and China agree four strategic partnerships worth US$71.8bn

Indonesia and China agreed on Wednesday four strategic partnerships worth US$71.8 billion (RM296.3 billion), including the development of 10 smart cities, according to a statement from Indonesia's presidential palace. The agreement involves the development of 10 smart cities through a partnership between Indonesia's sovereign wealth fund Danantara and a consortium led by China's Shaanxi Construction Engineering Group Corporation Limited with an investment value of around US$50 billion. *(Reuters)*

CN: Sets strongest yuan fixing since 2022 as Apec begins

China's central bank lifted its daily yuan reference rate to the strongest in over four years, a sign of tolerance for gradual gains as the nation hosts a key regional summit. The People's Bank of China set the so-called yuan fixing at 6.7118 per dollar, the strongest level since July 2022, according to data compiled by *Bloomberg*. The fixing limits the onshore yuan's daily movements to a 2% band on either side. *(Bloomberg)*

MY: Anwar meets Chinese tech firms to discuss potential investments in Malaysia

Prime Minister Datuk Seri Anwar Ibrahim met with representatives of China-linked technology and electronics manufacturing companies Fastprint and Fastrain here on Wednesday to discuss developments and proposed investments in Malaysia. The meetings were held on the sidelines of the 2026 Asia-Pacific Economic Cooperation (Apec) Economic Leaders' Meeting. *(Bernama)*

MY: Unsubsidised RON95 and diesel down 15 sen, RON97 falls 20 sen for Nov 19-25

The price of unsubsidised RON95 petrol and diesel will decline by 15 sen per litre, while RON97 petrol will fall by 20 sen per litre from Nov 19 to 25 amid easing global oil prices. RON97 drops 4.76% to RM4.00 per litre from RM4.20, while unsubsidised RON95 falls 3.88% to RM3.72 per litre from RM3.87, the Ministry of Finance (MOF) said in a statement on Wednesday. The price of unsubsidised diesel will decrease by 3.08% to RM4.72 per litre from RM4.87. *(The Edge*)

MY: PM bullish on Malaysia recording highest growth rate among emerging economies

Prime Minister Datuk Seri Anwar Ibrahim is hopeful that Malaysia's economy will record one of the highest growth rates among emerging economies, following its 5.5% expansion in the third quarter (3Q) of 2026. He said the latest growth figure announced by Bank Negara Malaysia (BNM) on Wednesday reflected the country's continued economic momentum, with growth potentially reaching 5.6%. *(Bernama*)

MY: OPR hike expectations in 2027 gain ground after strong 3Q GDP growth, says economists

Expectations for Bank Negara Malaysia (BNM) to hike the policy rate in the first quarter of next year (1Q2027) gain further support following the upside surprise in economic growth for the third quarter, according to economists. The stronger-than-expected gross domestic product (GDP) print reinforces the case for the central bank to go for policy normalisation, HSBC Global Investment Research said in a note on Wednesday. *(The Edge*)

MY: Anwar, HK chief executive discuss heightened digital economy, investment ties

Prime Minister Datuk Seri Anwar Ibrahim held a meeting with Hong Kong Chief Executive John Lee Ka-chiu here on Wednesday to discuss efforts to strengthen cooperation in digital trade, investments and capital markets. The meeting took place on the sidelines of the 2026 Asia-Pacific Economic Cooperation (Apec) Summit here. Posting on social media, Anwar said he also welcomed the opening of the Hong Kong Economic and Trade Office in Kuala Lumpur which, among others, is expected to help expand market access for Malaysian halal products. *(Bernama*)

MY: Tech boom gains are 'by design', says BNM as it plays down reliance risks

Malaysia's ability to capitalise on the global technology boom is "by design" instead of incidental, Bank Negara Malaysia (BNM) governor Datuk Seri Abdul Rasheed Ghaffour said, playing down concerns over the economy's heavy reliance on artificial intelligence (AI)-related demand and investments. While acknowledging that technology-related exports have largely driven the recent growth, Abdul Rasheed said Malaysia remained well diversified in terms of its economic structure, export products and trading partners. *(The Edge*)

MY: MediAsas pilot focused on operational readiness, not enrolment numbers, says BNM

Bank Negara Malaysia (BNM) said the MediAsas pilot programme is intended to test the scheme's operational readiness ahead of its nationwide launch in January 2027, rather than attract a large number of participants. BNM governor Datuk Seri Abdul Rasheed Ghaffour said the limited number of applications and policies issued was sufficient to assess the scheme's processes. *(The Edge*)

MY: BNM sees strong data centre investment momentum until 2030 despite US chip restrictions

Bank Negara Malaysia (BNM) expects Malaysia's data centre investment momentum to remain strong until at least 2030, even as fresh US chip export restrictions raise uncertainties over the sector's growth prospects. BNM governor Datuk Seri Abdul Rasheed Ghaffour said it was too early to assess the impact of the US restrictions but pointed to Malaysia's diversified base of data centre investors and sustained global demand for artificial intelligence (AI). *(The Edge*)

MY: Economy expands faster than first estimates in 3Q

Malaysia's economy grew at a slightly faster-than-estimated pace in the third quarter as stronger household spending and investment activities added to the boost from exports. Gross domestic product in July-September expanded 5.5% when compared to the same quarter a year earlier, according to second estimates by the Department of Statistics Malaysia. The rate is higher than the first estimate of 5.3% but easing from the 6.0% year-on-year gain in the second quarter. *(The Edge*)

MY: Govt targets minimum 30% local content for new data centres, says deputy minister

The government has set a minimum 30% local content target for new data centre projects approved under the Data Centre Task Force (DCTF), aiming to increase the participation of local companies in the development of the industry. Deputy Digital Minister Datuk Wilson Ugak Kumbong said the requirement covers engineering, maintenance, and network services, as well as technology provision. *(Bernama*)

MY: Sarawak premier meets SoftBank's Son in Tokyo to advance AI infrastructure partnership

Sarawak Premier Tan Sri Abang Johari Tun Openg had a high-level meeting with SoftBank Group chairman and chief executive officer Masayoshi Son in Tokyo on Tuesday evening as part of a continuing effort to advance ties with the Japanese technology conglomerate and its investment partners. *(The Edge*)

Corporate News

INARI: 1Q profit rises 18.5% on higher sales, declares 1.5 sen dividend

Inari Amertron Bhd first quarter for the financial year ending June 30, 2027 (FY2027) with an 18.5% increase in net profit, supported by higher production volumes across its business segments. Net profit rose to RM61 million for the quarter ended Sept 30, 2026 (1QFY2027), from RM51.5 million a year earlier, according to its Bursa Malaysia filing on Wednesday. *(The Edge)*

HLIND: 1Q profit up nearly 6%, declares 35 sen dividend

Hong Leong Industries Bhd reported a nearly 6% year-on-year increase in net profit for its first quarter, driven by a better sales mix of motorcycle models and lower raw material costs amid favourable foreign exchange movements. Net profit for the three months ended Sept 30, 2026 (1QFY2027) rose to RM163.67 million from RM154.9 million a year earlier, while revenue increased 1.40% to RM997.18 million from RM983.38 million. The group declared an interim single-tier dividend of 35 sen per share, payable on Dec 16. *(The Edge)*

GCB: Sees another record quarter, expects strength to continue

Guan Chong Bhd reported its earnings jumped nearly seven times in the third quarter to a new record as a decline in input costs and interest expense offset the revenue decline. Net profit at Asia's largest cocoa processor in the three months ended Sept 30, 2026 (3QFY2026) was RM277.65 million compared to RM41.24 million in the same quarter last year, according to an exchange filing. Revenue for the quarter fell 38% year-on-year to RM2.31 billion. *(The Edge)*

KOSSAN: 3Q net profit more than doubles, declares 2.5 sen dividend

Glove manufacturer Kossan Rubber Industries Bhd saw its net profit more than double in the third quarter, driven by higher average selling prices, increased sales volumes and improved production efficiencies. Net profit for the three months ended Sept 30, 2026 (3QFY2026) came in at RM87.41 million — the highest level since 1QFY2022 — compared with RM37.83 million in 3QFY2025, representing a 131% year-on-year increase. *(The Edge)*

UEMS: Declares special dividend as 3Q net profit more than doubles

UEM Sunrise Bhd saw its net profit more than doubled in the third quarter thanks to higher billings as well as lower interest costs and tax expense at the property developer. Net income for the three months ended Sept 30 (3QFY2026) surged to RM48.75 million from RM18.49 million a year earlier, according to its bourse filing on Wednesday. Year-on-year, profits from joint ventures nearly tripled, offsetting decline in operating profit, while finance costs fell 24%. *(The Edge)*

HUMEIND: Logs 5% 1Q profit rise as higher selling prices offset higher energy costs

Hume Cement Industries Bhd kicked off its new financial year with a 5.15% increase in net profit in the first quarter from a year earlier, as higher cement selling prices offset higher energy costs. Net profit for the three months ended Sept 30, 2026 (1QFY2027) rose to RM64.37 million from RM61.21 million in the same period a year earlier, according to a bourse filing on Wednesday. Revenue for the quarter rose 2.1% to RM296.04 million from RM290.07 million a year earlier. *(The Edge)*

SPTOTO: 1Q net profit rises 19% despite weaker lottery sales, declares two sen dividend

Sports Toto Bhd posted a 19.4% year-on-year increase in first-quarter net profit, as narrower losses at its UK luxury car dealership and a lower tax expense outweighed weaker earnings from its core lottery business. Net profit for the first quarter ended Sept 30, 2026 (1QFY2027) rose to RM26.39 million from RM22.1 million a year earlier, while quarterly revenue fell 5.9% to RM1.41 billion from RM1.5 billion. Earnings per share rose to 2.01 sen from 1.66 sen previously, according to the number forecast operator's bourse filing on Wednesday. *(The Edge)*

DLADY: Flags rising dairy costs ahead as it posts 26% jump in 3Q profit

Dutch Lady Milk Industries Bhd on Wednesday delivered its most profitable third quarter in 10 years with net profit jumping 26.3% year-on-year — driven by higher sales and foreign exchange gains — and announced a second interim dividend of 40 sen per share. However, the dairy producer cautioned that rising dairy raw material prices could weigh on margins next year. "There was an increase in dairy raw material prices in 3Q, which increase further in 4Q and are expected to impact the balance of the year. *(The Edge)*

VSTECS: 3Q net profit up almost 18% on higher sales and cloud services demand, declares 0.93 sen dividend

VSTECS Bhd's third-quarter net profit rose 17.6% year-on-year, driven by higher sales and cloud demand across its business segments. Net profit for the quarter ended Sept 30, 2026 (Q3FY2026) increased to RM30.30 million from RM25.78 million a year earlier, according to a bourse filing on Wednesday. Revenue for the quarter rose 14.3% y-o-y to RM1.13 billion from RM991.94 million, driven by higher sales across all three of its core segments. *(The Edge)*

TSH: 3Q net profit drops 68% on RM42.5m Indonesian fine

Plantation group TSH Resources Bhd reported a 68.5% drop in net profit for the third quarter ended Sept 30, 2026 (3QFY2026), dragged down by a RM42.5 million fine imposed by Indonesian authorities. Net profit fell to RM17.78 million from RM56.41 million a year earlier, while revenue rose 5.3% to RM277.69 million from RM263.65 million, according to its filing with Bursa Malaysia on Wednesday. *(The Edge)*

BIPORT: Exposed to Zetrix AI sukuk write-off in two ARIM funds

Bintulu Port Holdings Bhd said the group is exposed to AmanahRaya Investment Management Sdn Bhd's (ARIM) write-off of sukuk issued by Zetrix AI Bhd in two funds. The port operator noted that it and several of its units hold investments in the AmanahRaya Syariah Trust Fund (ARSTF) and the AmanahRaya Syariah Income Fund (ARSIF), two funds which held Zetrix AI sukuk. "With effect from Nov 10, ARIM revalued the Zetrix AI sukuk held by the funds to 'nil'. *(The Edge*)

PMCK: Partners Chin Hin to build RM376 mil private hospital in Kedah, eyes another in Melaka

Private healthcare services provider PMCK Bhd is partnering Chin Hin Group Bhd to develop a 300-bed private hospital in Alor Setar, Kedah, at an estimated cost of RM376 million, with plans to develop another hospital in Melaka. The partners plan to pursue a sale-and-leaseback arrangement involving a real estate investment trust (REIT) or other investors upon completion of the hospital in Kedah. The arrangement may cover the new project land and PMCK's existing Alor Setar hospital. *(The Edge*)

NORTHERN: Plans RM43m private placement to fund data centre solar projects

Northern Solar Holdings Bhd plans to raise as much as RM42.99 million via a private placement of up to 10% of its issued shares to partially fund its solar projects for two data centres in Johor. The placement will see up to 39.56 million new shares issued to third-party investors, according to the group's bourse filing on Wednesday. The identity of the investors and the issue price of the placement shares will be decided later, Northern Star said. *(The Edge*)

UMCCA: Tee brothers secure majority control of United Malacca as belated takeover offer turns unconditional

Prosper Group founders Tee Kim Tee @ Tee Ching Tee and his brother Tee Cheng Hua have secured majority control of plantation group United Malacca Bhd, following a belated mandatory general offer (MGO) that should have been triggered more than two years ago. The RM6.10-per-share cash offer became unconditional on Wednesday after the brothers and their parties acting in concert (PACs) raised their collective stake in United Malacca to 56.45%, from 47.02% as at Nov 2, when the offer document was issued. *(The Edge*)

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Appendix

Macro Calendar

Upcoming key economic data releases	Country	Date	Forecast	Previous
FOMC Meeting Minutes	US	Nov 19	n.a.	n.a.
Philadelphia Fed Manufacturing Index (Nov)	US	Nov 19	19.2	20.9
Initial Jobless Claims	US	Nov 19	199K	200K
Source: Investing.com				

Stock Selection Based on Dividend Yield

Company	Sector	Price (RM)	Dividend/Share (RM)	Dividend Yield (%)
Sentral REIT	REIT	0.59	0.06	10.51
Bermaz Auto	Consumer	0.79	0.08	10.51
CapitaLand Malaysia Trust	REIT	0.54	0.05	9.91
MBM Resources	Consumer	4.75	0.46	9.66
YTL Hospital REIT	REIT	0.95	0.08	8.95
KIP REIT	REIT	0.86	0.07	8.65
MAG Holdings	Consumer	1.18	0.09	8.05
Magnum	Consumer	1.18	0.09	8.05
Sports Toto	Consumer	1.28	0.10	8.05
Al-Salam REIT	REIT	0.52	0.04	7.69
Matrix Concepts Holdings	Property	0.91	0.07	7.58
Paramount Corporation	Property	0.97	0.07	7.53
Ta Ann Holdings	Plantation	5.32	0.40	7.52
TIME dotCom	Telco	5.44	0.37	6.86
UOA Development	Property	1.49	0.10	6.71

Source: Bloomberg
User guide: Mercury Securities compiles a list of dividend-yielding stocks for conservative long-term passive investors looking for regular income whilst capping downside risk of their investment.
Methodology: The list above includes stocks that have a high dividend yield, estimated to be greater than 4% per annum. These stocks also have a history of paying dividends consistently, having paid dividends for the past 3 years.

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IPO Tracker

Company	Listing Sought	Issue Price (RM/Share)	No. Of Shares (m)		Closing Date	Listing Date
			Public Issue	Offer for Sale		
Impact Capital Berhad	ACE Market	0.22	96.7	28.6	06 Nov	24 Nov
IOIPG Malaysia REIT	Main Market	0.96	-	2,200.0	10 Nov	25 Nov
Yes Group Management Berhad	ACE Market	0.18	96.7	28.6	13 Nov	26 Nov
Emits Berhad	ACE Market	0.16	93.8	37.5	19 Nov	01 Dec

Source: Bursa Malaysia

Local Index Performance

Indices	Last Close	Daily Chg %	Weekly Chg %	Monthly Chg %	YTD Chg %	Trailing 12 Month P/E	1-Year Forward P/E
FBM KLCI	1,566.7	-0.5	-1.0	-3.0	-6.7	13.4	14.1
FBM Small Cap	14,417.0	1.3	-1.6	-7.3	-8.6	9.3	9.2
FBM MidS Cap	30,270.2	1.2	-1.4	-7.1	-6.0	10.8	15.8
FBM ACE	4,894.9	2.9	-3.3	-9.4	0.5	79.6	18.1
FBM Mid 70	16,554.4	0.9	-1.4	-5.0	-1.5	17.5	15.6

Source: Bloomberg

Sector Indices (Bursa Malaysia)

Indices	Last Close	Daily Chg %	Weekly Chg %	Monthly Chg %	YTD Chg %	Trailing 12 Month P/E	1-Year Forward P/E
Finance	18,355.0	-0.5	-0.8	-1.0	-6.8	10.1	10.2
Plantation	8,730.3	-1.0	-0.7	0.4	4.9	18.6	15.5
Energy	769.1	1.6	-1.8	-9.7	0.2	9.4	8.6
Consumer Products and Services	434.4	-0.3	-0.9	-2.1	-19.1	18.4	14.4
Telecommunications & Media	366.6	0.2	-0.9	-3.9	-22.0	17.3	17.0
Healthcare	1,526.6	0.0	0.6	-5.0	-0.7	0.5	30.1
Industrial Products and Services	166.2	-0.4	-2.3	-6.8	-4.3	12.9	19.4
Property	927.5	0.1	-0.6	-5.4	-12.9	9.6	9.0
Technology	64.5	3.2	-2.9	-13.5	16.0	49.3	25.8
Transportation & Logistics	998.9	0.0	-1.5	-2.2	-2.0	16.1	14.2
Construction	294.7	0.8	-1.8	-5.9	-1.5	25.9	18.3
Utilities	1,639.2	0.3	-3.0	-7.9	-0.7	17.6	15.9
REIT	858.0	-0.4	0.6	-0.8	-9.1	18.4	15.4

Source: Bloomberg

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Daily Trading Participation (Bursa Malaysia) as at 18 November 2026

Participation	Participation %	Bought (RM Mil)	Sold (RM Mil)	Net (RM Mil)
Foreign Institution	35.3	850.0	1,098.0	-248.0
Local Institution	41.4	1,228.0	1,059.0	169.0
Retail	23.3	684.0	605.0	79.0
Total	100.0	2,762.0	2,762.0	0.0
Source: Bursa Malaysia				

Regional Market Performance

Indices	Last Close	Daily Chg %	Weekly Chg %	Monthly Chg %	YTD Chg %	Trailing 12 Month P/E	1-Year Forward P/E
Shanghai Composite Index	3,587.8	0.1	-1.3	-0.3	-9.6	16.5	13.3
KOSPI	5,067.4	2.0	-4.2	-11.6	20.2	1.9	4.9
Nikkei 225	59,024.3	0.3	-3.5	-6.7	17.3	20.8	19.7
TAIEX	40,194.9	0.3	-8.0	-11.1	38.8	20.0	17.3
Hang Seng Index	23,294.8	-0.9	-1.5	0.0	-9.1	11.8	10.8
Strait Times Index	5,054.9	-1.1	-3.4	-6.0	8.8	17.2	15.3
Vietnam Ho Chi Minh Stock Index	1,703.0	-1.4	-1.8	-2.2	-4.6	11.3	11.4
Philippines Stock Exchange Index	5,511.8	0.2	-1.5	-3.0	-8.9	8.5	8.6
Stock Exchange of Thailand	1,472.0	-0.2	-2.2	-3.1	16.9	12.0	12.8
Source: Bloomberg							

Global Market Performance

Indices	Last Close	Daily Chg %	Weekly Chg %	Monthly Chg %	YTD Chg %	Trailing 12 Month P/E	1-Year Forward P/E
S&P 500 Index	7,323.6	-0.2	-3.1	-3.4	7.0	25.1	20.1
Dow Jone Industrial Average	50,198.2	-1.1	-4.1	-3.0	4.4	21.9	20.3
NASDAQ-100	27,116.3	0.4	-3.0	-4.5	7.4	31.7	23.4
NASDAQ Composite	24,429.9	0.4	-2.8	-4.0	5.1	39.1	27.6
Euro STOXX 50	6,154.4	-0.9	-3.6	0.4	6.3	16.2	15.4
Euro STOXX 600	644.1	-1.0	-3.0	-0.4	8.8	16.0	15.0
FTSE 100	10,551.2	-1.3	-3.2	-1.7	6.2	14.7	12.4
Source: Bloomberg							

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Published & Printed By:

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