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

MARKET WATCH
Monday, November 23, 2026
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Daily Newswatch

Market Review

The FBM KLCI fell 0.6% to close at 1,556.5 points on Friday as continued selling pressure in selected heavyweights, particularly data-centre-related counters, weighed on sentiment amid the global equity rout. Technology (-4.8%), Industrial Products & Services (-2.4%) and Energy (-2.4%) led sectoral losses, with Press Metal Aluminium (-6.3%), CelcomDigi (-5.2%) and Mr DIY (-2.5%) among the worst performers of the bourse. Market breadth was negative with losers thumping gainers 828 to 328, while 471 counters were unchanged. WoW: The local bourse fell 1.6%. Technology (-6.5%), Industrial Products & Services (-5.8%) and Energy (-5.6%) led sectoral losses, with YTL Power (-9.2%), Petronas Chemicals (-8.9%) and YTL Corp (-8.6%) as the worst performers of the bourse. On the other side, REIT (+1.6%) and Health Care (+0.1%) were the only sectors in positive territory, while the top performers of the bourse were Maxis (+5.1%), IOI Properties (+3.5%) and Nestle (+1.8%).

Major Asian markets closed sharply lower on Friday as Wall Street's AI selloff spread to regional chip and tech stocks, with US-listed AI firm Anthropic's debut failing to revive the AI trade. The TAIEX plunged 6.2%, its third-largest daily point drop on record, as chipmaker TSMC (-4.8%) fell. The KOSPI slid 5.2% to below 5,000, a 10-month low, on a sixth straight day of foreign selling, dragged by electronic components maker Samsung Electro-Mechanics (-12.5%) and memory chipmakers Samsung Electronics (-7.0%) and SK Hynix (-5.9%). The Nikkei 225 tumbled 5.1%, led by OpenAI-exposed tech investor SoftBank Group (-14.5%), memory maker Kioxia (-11.7%) and chip-testing equipment maker Advantest (-10.3%). The Hang Seng fell 1.9% to its lowest close since April 2025 on tech weakness and disappointing Tencent results, though e-commerce giant Alibaba (+3.5%) rose on strong profit. The Shanghai Composite lost 1.2% to a 52-week low as semiconductor and computing hardware stocks fell, while banks gained. WoW: Taiwan's TAIEX (-17.5%) had its worst week since 1991, followed by the KOSPI (-7.9%), Nikkei 225 (-7.7%), Hang Seng (-5.2%) and Shanghai Composite (-2.8%).

European equities closed sharply lower on Friday as the AI selloff triggered a global flight from risk. The Euro STOXX 50 fell 2.5% to 5,945 and the STOXX 600 dropped 1.9% to 626.7. AI-linked names slid as Anthropic nearly erased its IPO gains, with chip equipment maker ASML (-8.7%), chipmaker Infineon (-7.5%), power equipment maker Siemens Energy (-6.3%) and industrial group Siemens (-4.5%) lower. Banks ING and BBVA fell over 3% each on rising default risks, while Deutsche Bank's weekly loss reached 13% after Tuesday's whistleblower leaks revived compliance concerns. WoW: Euro STOXX 50 fell nearly 7% and STOXX 600 5.7%.

Wall Street plunged on Friday as AI losses spread market-wide. The S&P 500 fell 3.5%, Nasdaq 100 (-5.0%) and Dow (-1.8%). AI chipmaker Nvidia (-12%), down over 45% since early October, fell on export curbs and leadership uncertainty, while Broadcom, AMD, Marvell and Applied Materials sank over 10%. Anthropic (-11%) nearly erased IPO gains, and SpaceX fell nearly 7% after a US$32bn debt sale cleared at steep yields. Health insurers extended losses on Medicare Advantage audit plans. WoW: S&P 500 and Nasdaq 100 fell -8% and -10%, respectively.

Macro Snapshots

- **US:** Trump threatens to tax firms building data centres abroad
- **CN:** US$2bn bond draws large orders, prices in line with US Treasuries
- **MY:** BNM's international reserves at US$132.1bn as at Nov 13

Corporate Snapshots

- **RHBBANK:** RAM Ratings upgrades RHB Bank and its debt facilities to AAA
- **ITMAX:** Sets up sukuk programmes with RM1bn combined limit
- **SEM:** 7-Eleven Malaysia 3Q net profit up threefold on strong sales

Indices	Last Close	Daily chg %	YTD chg %
FBM KLCI	1,556.5	(0.6)	(7.4)
Dow Jones	48,147.3	(1.9)	0.2
Nasdaq CI	22,617.7	(5.3)	(2.7)
S&P 500	6,910.4	(3.7)	0.9
SX5E	5,942.0	(2.8)	2.6
FTSE 100	10,346.3	(1.0)	4.2
Nikkei 225	56,436.7	(5.1)	12.1
Shanghai CI	3,533.8	(1.2)	(11.0)
HSI	22,410.8	(1.9)	(12.6)
STI	4,972.2	(2.1)	7.0

Market Activities	Last Close	% Chg
Vol traded (m shares)	2,918.5	(20.0)
Value traded (RM m)	2,472.4	(17.5)
Gainers	328	
Losers	828	
Unchanged	471	

Top 5 Volume	Last Close	Daily chg %	Vol (m)
DNEX	0.420	7.7	95.4
MMAG	0.015	50.0	62.2
ZETRIX	0.055	0.0	43.3
BCG	1.080	(0.9)	43.1
MAGH	0.160	0.0	35.5

Top 5 Turnover	Last Close	Daily chg %	Val (RM m)
RHBBANK	7.650	0.0	156.3
MAY	9.870	(0.6)	136.1
PMAH	6.270	(6.3)	104.0
CIMB	7.040	0.3	89.4
YTLP	3.950	(1.3)	86.9

Currencies	Last Close	Daily chg %
USD/MYR	4.112	0.0
USD/JPY	158.890	(0.2)
EUR/USD	1.098	0.1
USD/CNY	6.671	0.3
US Dollar Index	103.777	(0.0)

Commodities	Last Close	% Chg
Brent (USD/barrel)	91.8	(0.9)
Gold (USD/troy oz)	3,571.6	0.9
CPO (MYR/metric t)	4,040.0	(2.5)
Bitcoin (USD/BTC)	61,215.4	0.6

Source: Bloomberg

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Macro News

GLOBAL: Xi, Trump, Putin agree to increase supply of global fuels

The leaders of the US, China and Russia agreed to boost the supply of fuels in a world that's seen prices surge as a result of wars being waged by two of the three military superpowers. President Xi Jinping hosted what he called a "groundbreaking" discussion with Presidents Donald Trump and Vladimir Putin on Thursday in Shenzhen, China. The discussion spanned issues from Ukraine and denuclearisation to the management of major-power disputes. *(Bloomberg)*

US: Trump threatens to tax firms building data centres abroad

US President Donald Trump vowed to tax American companies that build data centres in other countries, though he didn't detail exactly how such a threat would be carried out and what legal authority the government might have to impose one. If US firms want to build data centres abroad, "they can", Trump said during a press briefing at the White House on Friday. "But we're going to put a tremendous tax on them. If they do it, we want them to build it here." *(Bloomberg)*

US: Consumer sentiment up on improved post-election outlook

US consumer sentiment picked up in November as gasoline prices fell, the outlook for business conditions improved and inflation expectations plunged. The University of Michigan's final sentiment index increased to 51.5 from 48 in October, according to the survey released Friday. The median estimate in a *Bloomberg* survey of economists projected November sentiment would rise to 51.6. *(Bloomberg)*

US: Dollar set for fourth weekly advance following Anthropic IPO

The dollar is headed for a fourth straight weekly gain as demand tied to the Anthropic PBC IPO added to support from expectations of further Federal Reserve interest-rate hikes and elevated US Treasury yields. The Bloomberg Dollar Spot Index is up 0.5% this week — on track for its longest winning weekly streak since Oct 9. The advance coincides with the start of trading for Anthropic on the Nasdaq Global Select Market on Thursday. *(Reuters)*

US: Signed off on sales of nearly 900,000 AI chips to China in six months, House committee says

The Trump administration approved shipments of nearly 900,000 advanced artificial intelligence (AI) chips made by Nvidia and AMD for Chinese companies from December 2025 through May 2026, the House Foreign Affairs Committee said on Thursday. The approvals for 879,000 chip shipments by the Commerce Department included 75,000 for Alibaba, 150,000 for Tencent, 43,000 for Baidu, and 4,000 for BYD, all on the Pentagon's list of alleged Chinese military-backed companies, the committee noted. *(Reuters)*

EU: Cocoa pricier in Europe as traders brace for deforestation rules

London cocoa futures are commanding a widening premium over New York as the European Union's impending deforestation rules threaten to tighten bean supplies to the bloc. London futures reflect cocoa deliverable in Europe, and the gap signals concerns about bean availability once the EU Deforestation Regulation comes into effect on Dec 30. Companies will need to trace beans from pod to port to ensure they weren't grown on deforested land. *(Bloomberg)*

CN: US$2bn bond draws large orders, prices in line with US Treasuries

China's US$2 billion (RM8.2 billion) bond drew more than US$72 billion in orders, pricing it in line with US Treasuries instead of the 25-basis-point premium that was first suggested, according to a bookrunner's message seen by *Reuters* on Friday. The deal for the three-year debt, which was 36 times oversubscribed, marks the second that China has carried out at a zero premium after it also raised US$2 billion in a three-year bond last year. *(Reuters)*

CN: Xi embraces Trump as China's best option to contain chip row

Chinese leader Xi Jinping showed US President Donald Trump extraordinary hospitality during their third summit of the year. For Beijing, that bonhomie might be its best strategy for stopping a spiralling chip battle with its main rival. China's top leader broke nearly five decades of precedent to give Trump a rare airport welcome — and cheek-to-cheek hug — as the Republican touched down on Wednesday in Shenzhen. *(Bloomberg)*

JP: CPI picks up, keeping BOJ on track for rate hike

Bank of Japan (BOJ) governor Kazuo Ueda said he expects consumer spending to return to a rising trend, signalling that a recent economic contraction driven by weak consumption won't dissuade the central bank from raising its benchmark interest rate. "In addition to a steady increase in nominal wages, we expect the pace of inflation to gradually slow down," Ueda said in Parliament on Thursday. "The positive cycle from income to spending will be maintained and personal consumption will return to a moderate growth trend." *(Bloomberg)*

MY: BNM: Tackling medical insurance premiums alone won't resolve rising healthcare costs

Containing medical insurance premiums alone will not resolve rising healthcare costs, as the underlying cost of care must also be addressed, Bank Negara Malaysia (BNM) governor Datuk Seri Abdul Rasheed Ghaffour said. He said rising medical costs, escalating insurance claims and higher premiums are important vital signs indicating pressure on the healthcare system. *(Bernama)*

MY: Trade performance maintains strong upward trajectory in October — Miti

Trade performance maintained its strong upward trajectory in October 2026, achieving historic milestones and reinforcing the nation's position as a resilient, increasingly diversified trading economy amid a challenging global environment. In a statement on Friday, the Ministry of Investment, Trade and Industry (Miti) said the total trade, exports, imports and trade surplus reached their highest monthly levels. *(Bernama)*

MY: Poised for another quarter of above-5% GDP growth on strong export performance, economists say

Malaysia may record another strong quarter of growth towards the end of the year, as robust October trade data signals that the economy remains on a strong footing, according to economists. The 61.1% year-on-year growth in exports in October, well above *Bloomberg*'s forecast of 48.8%, signals "a clear upside for growth", BIMB Securities said. *(The Edge)*

MY: Philippines sign pact to boost central banking cooperation

Malaysia and Philippines agreed to set up a framework to boost collaboration on central banking and financial sector development. Bank Negara Malaysia (BNM) and Bangko Sentral ng Pilipinas commit to cooperating in a broad range of areas, including Islamic finance, cross-border payment linkages, local currency transactions, and financial innovation and digitalisation, according to a joint statement. *(The Edge)*

MY: Selangor logs RM87.9bn in approved investments for first nine months of 2026, with 85% from services sector

Selangor recorded RM87.9 billion in approved investments in the first nine months of 2026 with 84.8% coming from the services sector, according to the state's investment promotion agency, Invest Selangor Bhd. The service sector accounted for RM74.5 billion of the total approved investments, while the manufacturing sector made up the remaining RM13.4 billion, according to the agency's statement on Friday. From these investments, the state expects to create a total of 34,971 job opportunities across 1,302 approved projects. *(The Edge)*

MY: Anwar says has no regrets backing China's Xi despite 'pressures'

Prime Minister Datuk Seri Anwar Ibrahim said he had no regrets about giving his full support to Chinese President Xi Jinping despite various pressures, reaffirming Malaysia's commitment to strengthening bilateral relations with China. Anwar said his support was based on his confidence in Xi's leadership, particularly his ability to bring major world powers together and foster peace amid geopolitical uncertainties. *(Bernama)*

MY: BNM's international reserves at US$132.1bn as at Nov 13

Bank Negara Malaysia's (BNM) international reserves stood at US$132.1 billion as at Nov 13, 2026, compared with US$132.6 billion as at Oct 30. In a statement on Friday, the central bank said the main components of the international reserves comprised US$116.2 billion in foreign currency reserves, US$1.3 billion in International Monetary Fund (IMF) reserve position, US$6.0 billion in special drawing rights (SDRs), US$6.2 billion in gold and US$2.4 billion in other reserve assets. *(Bernama)*

MY: Anwar, China's Xi discuss various fields of cooperation to strengthen bilateral relations

Malaysia and China discussed various fields of cooperation during the bilateral meeting between Prime Minister Datuk Seri Anwar Ibrahim and Chinese President Xi Jinping on Friday. Anwar said the collaborations include the water supply project from the Perak River to Penang, artificial intelligence (AI), investment, trade, and the rare earth industry. *(Bernama)*

MY: Mida sees sustained investment momentum in 2027 if Malaysia maintains growth

Malaysia is expected to sustain strong investment momentum in 2027 if the economy continues to grow at between four and five per cent, supported by trade performance, economic resilience and ongoing investor interest, said Malaysian Investment Development Authority (Mida) chairman Tengku Datuk Seri Zafrul Abdul Aziz. He said Malaysia's investment performance remained encouraging, with total investments rising 20% in the first nine months of this year, reflecting a positive correlation with the country's economic growth. *(Bernama)*

MY: Exports surge 61% to record high in October as electronics shipments soar

Malaysia's exports grew at their fastest pace in more than five years to a record high in October, fuelled by sustained global demand for semiconductors and artificial intelligence (AI), as shipments to the US and Taiwan surged. Exports rose 61.1% year-on-year to RM239.2 billion, accelerating from September's 54.5% growth, marking the fastest expansion since April 2021, according to data released by the Ministry of Investment, Trade and Industry (Miti) and the Department of Statistics Malaysia (DOSM) on Friday. *(The Edge)*

Corporate News

YTLPOWR: Denies Johor data centre aided Nvidia chip diversion, says operations comply with Malaysian and US rules

YTL Power International Bhd (KL:YTLPWR) has denied allegations that its data centres in Johor were involved in diverting Nvidia chips to Chinese customers, describing reports linking the group to the controversy as speculative and unsubstantiated. In a statement on Friday, YTL Power said its data centre business provides co-location services, including space, power, cooling and connectivity, to multiple global customers, including US-based hyperscalers. *(The Edge)*

RHBBANK: RAM Ratings upgrades RHB Bank and its debt facilities to AAA/Stable

RHB Bank Bhd on Friday said its financial institution rating has been upgraded to AAA/Stable/P1 from AA1/Positive/P1 by RAM Ratings. The country's fourth-largest bank by total assets said in a bourse filing the ratings were upgraded alongside its other arms, RHB Islamic Bank Bhd and RHB Investment Bank Bhd. The credit ratings agency also said in separate statement that the long-term ratings of RHB Bank's sukuk and debt facilities have been correspondingly upgraded. *(The Edge)*

ITMAX: Sets up sukuk programmes with RM1bn combined limit

ITMAX System Bhd said it has established an Islamic Medium-Term Notes (IMTN) programme and an Islamic Commercial Papers (ICP) programme with an aggregate limit of RM1 billion in nominal value. The smart city integrated system and solutions provider lodged the documents for the sukuk programmes with the Securities Commission Malaysia, via its wholly owned unit ITMAX Capital Sdn Bhd, its special purpose funding vehicle, according to a bourse filing on Friday. *(The Edge)*

LHI: 3Q profit flat, weighed by higher raw material costs

Leong Hup International Bhd posted a flat net profit for the third quarter, dragged by higher raw material costs and finance costs. Net profit for the three months ended Sept 30, 2026 edged up 0.73% to RM130.09 million from RM129.14 million a year earlier, according to the livestock feed and poultry outfit's bourse filing on Friday. Revenue rose 11.28% to RM2.46 billion from RM2.21 billion, with growth logged across both its livestock- and poultry-related products and feedmill segments. *(The Edge)*

SEM: 7-Eleven Malaysia 3Q net profit up threefold on strong sales

7-Eleven Malaysia Holdings Bhd's third-quarter net profit surged more than threefold, thanks to stronger contributions from its convenience store sales. The convenience store operator posted net profit of RM6.53 million for the three months ended Sept 30, 2026 (3QFY2026), compared with RM2.13 million a year earlier, according to the group's bourse filing on Friday. Revenue, meanwhile, increased 17.91% to RM938.36 million from RM795.85 million a year earlier. *(The Edge)*

VELESTO: Declares two sen special dividend despite 59% fall in 3Q profit

Velesto Energy Bhd saw its third-quarter net profit fall 58.9% year-on-year, weighed by lower drilling rig charter rates and the absence of a larger cost provision reversal recorded a year earlier. The upstream oil and gas services provider's net profit fell to RM20.61 million for the third quarter ended Sept 30, 2026 (3QFY2026), from RM50.16 million a year earlier. Revenue for the quarter declined 9.5% to RM217.24 million from RM240.13 million, as average daily charter rates for its drilling segment eased to US$103,000 from US$120,000 in the corresponding quarter last year. *(The Edge)*

AEON: 3Q net profit drops despite higher revenue as tax bill jumps

Aeon Co (M) Bhd saw its third-quarter net profit drop 36.7% year-on-year, as a sharp increase in tax expense offset higher revenue from its retail and property management businesses. Net profit for the three months ended Sept 30, 2026 (3QFY2026) fell to RM9.25 million from RM14.62 million a year earlier, its bourse filing showed. Revenue rose 1.5% to RM1.01 billion from RM995.19 million. The group's tax expense, however, more than quadrupled to RM17.3 million from RM4 million in the corresponding quarter a year earlier. *(The Edge)*

CNERGEN: 3Q profit more than quadruples on record revenue, declares one sen dividend

Penang-based electronics manufacturing solutions provider Cnergenz Bhd saw its third-quarter net profit more than quadruple from a year earlier, as revenue hit a record high driven by stronger sales. The group's net profit rose to RM7.64 million for the third quarter ended Sept 30, 2026 (3QFY2026) from RM1.64 million a year earlier. Revenue for the quarter surged 296.5% to a record RM104.02 million from RM26.23 million in 3QFY2025, primarily driven by higher sales of integrated solutions for surface-mount technology (SMT) manufacturing lines, standalone SMT machines and equipment, as well as other services. *(The Edge)*

SWKPLNT: 3Q net profit rises 18% on higher palm product prices

Sarawak Plantation Bhd logged an 18.11% increase in net profit for the third quarter, as higher palm product prices more than offset lower sales volume. Net profit for the three months ended Sept 30, 2026 rose to RM36.76 million from RM31.12 million a year earlier, according to the oil palm planter's bourse filing on Friday. Revenue increased 10.6% to RM154.49 million from RM139.68 million. The group declared a third interim dividend of 7.5 sen, down from 15 sen a year earlier, to be paid on Jan 21, 2027. *(The Edge)*

IOIPG: Completes Shenton House acquisition from CEO three years after conflict concerns

IOI Properties Group Bhd has completed its acquisition of the company that owns Singapore's Shenton House from its group chief executive officer and major shareholder Datuk Lee Yeow Seng, three years after his private purchase of the property raised potential conflict-of-interest concerns. The acquisition was completed following payment of a nominal S$1 consideration and settlement of S$217.06 million in shareholder advances, according to the group's Bursa Malaysia filing. *(The Edge*)

MHLDG: Led consortium bags RM1.12bn solar EPCC contract, eyes more renewable energy projects

A consortium led by MN Holdings Bhd has secured a RM1.12 billion engineering, procurement, construction and commissioning (EPCC) contract for two large-scale solar photovoltaic facilities in Kemaman, Terengganu, marking the group's largest contract win to date and its maiden entry into the large-scale solar segment. The consortium comprises MN Holdings' wholly-owned unit MN Utilities Engineering Sdn Bhd (MNUE), China Railway 11th Bureau Group Electric Engineering Co Ltd (CRCC11GEE) and DB Energy Sdn Bhd (DB Energy). *(The Edge*)

PIE: Bags US$99.8m AI server assembly order

Electronic manufacturing services (EMS) firm PIE Industrial Bhd has secured a US$99.82 million (RM410.6 million) order to assemble AI server-related products for data centres. The order, announced in a Bursa filing on Friday, was secured by wholly owned subsidiary Pan-International Electronics (Malaysia) Sdn Bhd from an unnamed overseas multinational customer in the AI server industry. It is expected to be fulfilled progressively in the financial years ending Dec 31, 2026 (FY2026) and FY2027. *(The Edge*)

MANULIFE: Moves its regional marketing chief to lead Malaysian business

Manulife Holdings Bhd on Friday announced Harshal Ashok Shah as the life insurer's group chief executive officer effective immediately. Shah, a 47-year-old Indian national, will succeed Vibha Hamsi Coburn who is taking on a new role in another territory, according to exchange filings. Shah will also serve as chief executive of Manulife Insurance Bhd, the main local operating arm of the Canadian multinational financial services firm. Both changes take effect on Friday. *(The Edge*)

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Appendix

Macro Calendar

Upcoming key economic data releases	Country	Date	Forecast	Previous
S&P Global Services PMI (Nov)	US	Nov 23	n.a.	56.1
S&P Global Manufacturing PMI (Nov)	US	Nov 23	n.a.	54.9
CB Consumer Confidence (Nov)	US	Nov 24	n.a.	91.7
Core PCE Price Index (MoM) (Oct)	US	Nov 25	n.a.	0.3%
Core PCE Price Index (YoY) (Oct)	US	Nov 25	n.a.	3.1%
GDP (QoQ) (Q3)	US	Nov 25	3.4%	2.2%
Durable Goods Orders (MoM) (Oct)	US	Nov 25	n.a.	1.9%
Initial Jobless Claims	US	Nov 25	n.a.	n.a.
New Home Sales (Oct)	US	Nov 25	n.a.	676K
Crude Oil Inventories	US	Nov 25	n.a.	3.380M
Source: Investing.com				

Stock Selection Based on Dividend Yield

Company	Sector	Price (RM)	Dividend/Share (RM)	Dividend Yield (%)
Bermaz Auto	Consumer	0.76	0.08	10.92
Sentral REIT	REIT	0.58	0.06	10.78
CapitaLand Malaysia Trust	REIT	0.54	0.05	9.81
MBM Resources	Consumer	4.78	0.46	9.64
YTL Hospital REIT	REIT	0.93	0.09	9.14
MAG Holdings	Consumer	1.20	0.11	8.75
Magnum	Consumer	1.20	0.11	8.75
KIP REIT	REIT	0.86	0.07	8.65
Sports Toto	Consumer	1.25	0.10	8.24
Al-Salam REIT	REIT	0.50	0.04	8.00
Paramount Corporation	Property	0.95	0.07	7.68
Matrix Concepts Holdings	Property	0.90	0.07	7.67
Ta Ann Holdings	Plantation	5.22	0.40	7.66
TIME dotCom	Telco	5.45	0.37	6.84
UOA Development	Property	1.48	0.10	6.76

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	1,556.5	-0.6	-1.6	-3.7	-7.4	13.4	14.0
FBM Small Cap	14,161.1	-1.6	-3.4	-8.9	-10.2	6.7	9.2
FBM MidS Cap	30,203.2	-0.2	-1.6	-7.3	-6.2	10.8	15.7
FBM ACE	4,818.8	-1.9	-4.8	-10.8	-1.1	82.9	17.7
FBM Mid 70	16,279.8	-1.8	-3.0	-6.5	-3.1	17.6	15.5

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	18,303.4	-0.3	-1.1	-1.3	-7.1	10.1	10.2
Plantation	8,687.8	-0.7	-1.2	-0.1	4.4	18.7	15.5
Energy	739.3	-2.4	-5.6	-13.2	-3.6	9.2	8.4
Consumer Products and Services	433.4	-0.4	-1.1	-2.3	-19.3	18.4	14.2
Telecommunications & Media	360.9	-1.5	-2.4	-5.4	-23.2	17.3	17.0
Healthcare	1,517.7	-1.1	0.1	-5.5	-1.3	0.5	29.5
Industrial Products and Services	160.2	-2.4	-5.8	-10.2	-7.7	12.7	19.2
Property	922.2	-0.4	-1.2	-6.0	-13.4	9.6	8.9
Technology	62.1	-4.8	-6.5	-16.7	11.8	49.9	26.1
Transportation & Logistics	988.8	-1.2	-2.5	-3.2	-2.9	16.1	14.2
Construction	288.7	-1.6	-3.8	-7.8	-3.5	25.8	18.2
Utilities	1,619.5	-1.0	-4.2	-9.1	-1.9	17.6	15.8
REIT	866.2	1.6	1.6	0.2	-8.2	18.3	15.3

Source: Bloomberg

Daily Trading Participation (Bursa Malaysia) as at 20 November 2026

Participation	Participation %	Bought (RM Mil)	Sold (RM Mil)	Net (RM Mil)
Foreign Institution	35.1	794.0	941.0	-146.0
Local Institution	35.7	936.0	831.0	105.0
Retail	29.2	743.0	701.0	41.0
Total	**100.0**	**2,473.0**	**2,473.0**	**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	3,533.8	-1.2	-2.8	-1.8	-11.0	16.4	13.3
KOSPI	4,870.0	-5.2	-7.9	-15.0	15.6	1.9	5.0
Nikkei 225	56,436.7	-5.1	-7.7	-10.8	12.1	21.0	19.9
TAIEX	36,033.3	-6.2	-17.5	-20.3	24.4	19.1	16.5
Hang Seng Index	22,410.8	-1.9	-5.2	-3.8	-12.6	11.7	10.7
Strait Times Index	4,972.2	-2.1	-5.0	-7.5	7.0	17.3	15.4
Vietnam Ho Chi Minh Stock Index	1,688.8	0.0	-2.7	-3.0	-5.4	11.2	11.2
Philippines Stock Exchange Index	5,307.0	-3.1	-5.1	-6.6	-12.3	8.4	8.5
Stock Exchange of Thailand	1,450.3	-1.5	-3.6	-4.5	15.1	12.1	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	6,910.4	-3.7	0.0	-8.8	0.9	21.6	19.0
Dow Jone Industrial Average	48,147.3	-1.9	0.0	-7.0	0.2	21.0	19.4
NASDAQ-100	25,029.0	-5.6	0.0	-11.8	-0.9	29.3	21.7
NASDAQ Composite	22,617.7	-5.3	0.0	-11.1	-2.7	36.2	25.5
Euro STOXX 50	5,942.0	-2.8	0.0	-3.1	2.6	15.6	14.9
Euro STOXX 600	625.7	-2.0	0.0	-3.3	5.7	15.5	14.6
FTSE 100	10,346.3	-1.0	0.0	-3.6	4.2	14.4	12.1
Source: Bloomberg							

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