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BURSA	5-Mar	Day chg	% chg
KLCI	1,713.2	14.98	0.88%
FTSE EMAS	12,517.3	82.9	0.67%
FTSE Smallcap	15,408.3	-8.45	-0.05%
FTSE MESDAQ	4,496.5	-9.4	-0.21%
KLSE Mkt Cap (RM'b)	1,992.9	9.9	0.50%

BURSA DAILY TRADING PARTICIPATION

Participation	Net (RM'm)	Value (%)
Local Institution	-175.8	50.4%
Local Retail	17.2	16.7%
Foreign	158.6	32.9%

INDICES	5-Mar	Day chg	% chg
Dow Jones	47,954.7	-784.7	-1.61%
S&P 500	6,830.7	-38.8	-0.56%
NASDAQ	22,749.0	-58.5	-0.26%
FTSE-100	10,413.9	-153.7	-1.45%
Nikkei 225	55,278.1	1,032.5	1.90%
SHCOMP	4,108.6	26.1	0.64%
HSI	25,321.3	71.9	0.28%
STI	4,846.6	33.8	0.70%
KOSPI	5,583.9	490.4	9.63%
TWSE	33,672.9	844.1	2.57%
JCI	7,710.5	133.5	1.76%
SET	1,417.3	32.7	2.36%

FOREX	5-Mar	4-Mar	% chg
USD/MYR:	3.9447	3.9430	0.04%
EUR/USD:	1.1611	1.1634	-0.20%
GBP/USD:	1.3351	1.3379	-0.21%
USD/YEN:	157.29	157.28	0.01%
USD/SGD:	1.2766	1.2751	0.12%
USD/HKD:	7.8217	7.8178	0.05%

KEY STATS

KLCI Spot			
Vol (m shares):	2,851.1	3,510.3	-18.78%
Value (RMm):	3,260.3	3,799.1	-14.18%
KLCI Future			
March-26	1,697.0	1,672.0	1.50%
April-26	1,699.5	1,675.0	1.46%
CPO Price (RM/tonne)			
Soybean (US\$/bu)	1,179.3	1,169.5	0.83%
SoyOil (USc/lb)	65.6	63.6	3.10%
Gold (US\$/troy oz)	5,078.7	5,134.7	-1.09%
Nymex crude oil (US\$/bbl)	81.0	74.7	8.51%
Latex (RM/kg)	6.4	6.4	0.78%
Tin (US\$/mt)	49,828.0	50,957.0	-2.22%

Research Highlights

NEWS HIGHLIGHTS

- Magma to acquire LUMA Hotel in Kota Kinabalu for RM60.9m in cash-and-shares deal
- Jati Tinggi to buy 51.0% stake in polyethylene pipe manufacturer
- Sunview unit bags RM289.7m Sarawak solar EPCC job from Malakoff
- InNature seals deal to distribute Yves Rocher products in Singapore
- West River bags RM11.3m Pavilion Bukit Jalil electrical contract

MACRO BITS

- IMF says Mideast war to test world economy, expecting new shocks
- China ramps up 'high stakes' tech race with US as economic imbalances deepen
- Holds OPR steady as resilient growth and contained inflation keep policy on pause (See *Economic Viewpoint: BNM MPC Meeting (5 March)*)
- Anwar: National energy supply secure, contingency plans ready to safeguard economy
- Over 60.0% of Malaysian exporters likely affected by Middle East conflict — Matrade survey
- Govt analysing cost-push inflation risk amid Middle East conflict
- MOF: RON95 subsidy down to MYR1.8b in 4Q2025
- Food supply stable despite Middle East tensions, says Mat Sabu
- BOJ is said to keep april hike on table with eyes on Iran crisis
- Muted inflation in Thailand may cushion oil-driven price surge
- US productivity tops forecast in 4Q as firms seek to contain costs
- ECB's Villeroy sees no reason for ECB to raise interest rates for now

IDEAS OF THE DAY (SEE SEPARATE REPORTS FOR DETAILS)

- Sector Update: Plantation
- Company Update: KJTS, PARAMON
- Rating Summary
- Economic Viewpoint: BNM MPC Meeting, Bond Market Weekly Outlook, Ringgit Weekly Outlook

#	Top Volume			Top Gainer			Top Loser					
	Stock	Price	%Chg (+/-)	Vol (m)	Stock	Price	%Chg (+/-)	Vol (m)	Stock	Price	%Chg (+/-)	Vol (m)
1	SIME	2.41	1.3	29.40	PMETAL	7.65	3.4	17.40	MRDIY	1.70	-1.2	10.20
2	MAYBANK	11.70	0.3	26.20	PCHEM	3.55	2.9	13.50	PETDAG	22.20	-0.7	1.02
3	PBBANK	4.90	1.2	25.10	99SMART	3.50	1.7	14.00	QL	3.94	-0.5	0.89
4	CIMB	8.04	1.1	20.40	CDB	3.21	1.3	3.79	HLBANK	22.98	-0.4	1.23
5	PMETAL	7.65	3.4	17.40	SIME	2.41	1.3	29.40	MAXIS	3.85	0.0	3.73
6	YTL	1.70	0.6	16.50	SUNWAY	5.70	1.2	4.82	PPB	10.90	0.0	0.35
7	99SMART	3.50	1.7	14.00	PBBANK	4.90	1.2	25.10	RHBBANK	8.50	0.0	12.40
8	PCHEM	3.55	2.9	13.50	GAMUDA	4.18	1.2	10.30	MISC	8.24	0.1	11.50
9	RHBBANK	8.50	0.0	12.40	TM	7.60	1.2	3.78	IHH	8.98	0.2	3.79
10	MISC	8.24	0.1	11.50	CIMB	8.04	1.1	20.40	IOICORP	3.93	0.3	3.24

Notes: # KL Composite Index (FBMKLCI) component stocks

Corporate News

- **Magma to acquire LUMA Hotel in Kota Kinabalu for RM60.9m in cash-and-shares deal**

Magma Group Bhd said it plans to acquire the LUMA Hotel in Kota Kinabalu for RM60.9m in a cash-and-shares deal, to expand its hotel portfolio. The group said its wholly-owned subsidiary, Magma Avenue Sdn Bhd, has entered into a heads of agreement to acquire the LUMA Hotel business and four contiguous buildings in the Sabah capital. Under the agreement, Magma will acquire 100.0% equity in HH Home Hotel Sdn Bhd, which owns the LUMA Hotel and its brand, for RM12.8m via a combination of cash and the issuance of 27.2m new shares. (*The Edge Malaysia*)

- **Jati Tinggi to buy 51.0% stake in polyethylene pipe manufacturer**

Jati Tinggi Group Bhd (JTGROUP) said it is acquiring a 51.0% stake in a polyethylene pipe manufacturing company for RM6.1m in cash. The company, Roflex Pipe Sdn Bhd, is one of the suppliers of polyethylene pipes to Jati Tinggi, said the infrastructure utilities engineering services provider in a filing with Bursa Malaysia. The proposed acquisition, it said, will allow the group to participate in Roflex's future business operations and gain direct access to polyethylene pipes, which are essential materials used for the group's projects. (*The Edge Malaysia*)

- **Sunview unit bags RM289.7m Sarawak solar EPCC job from Malakoff**

Sunview Group Bhd's unit has secured a RM289.7m fixed contract sum to carry out engineering, procurement, construction and commissioning (EPCC) work for a solar photovoltaic power plant in Bintulu, Sarawak. Sunview said its wholly owned subsidiary Fabulous Sunview Sdn Bhd had accepted a letter of award from Malakoff Evergreen Sdn Bhd (MEVSB) for the solar photovoltaic project. (*The Edge Malaysia*)

- **InNature seals deal to distribute Yves Rocher products in Singapore**

InNature Bhd, the operator of The Body Shop stores in Malaysia, Singapore, Vietnam and Cambodia, announced it has secured a deal to exclusively distribute products of French natural cosmetics and skin care brand Yves Rocher in Singapore. A distribution agreement was inked between unit Hello Natural Singapore Pte Ltd and Laboratoires De Biologie Végétale Yves Rocher for the arrangement. It will span five years, renewable for a further five years. (*The Edge Malaysia*)

- **West River bags RM11.3m Pavilion Bukit Jalil electrical contract**

West River Bhd has secured an electrical services contract worth RM11.3m for the Park Green development at Pavilion Bukit Jalil. The group said its wholly-owned subsidiary, West River Engineering Sdn Bhd, had accepted the letter of award from BUCG (M) Sdn Bhd. The sub-contract involves the alternative design, supply, delivery, installation, testing and commissioning of electrical systems for two 47-storey serviced apartment towers. The project comprises a total of 453 units. (*The Edge Malaysia*)



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Macro Bits

Global

- [IMF says Mideast war to test world economy, expecting new shocks](#) International Monetary Fund (IMF) Managing Director Kristalina Georgieva said the war in the Middle East will test global economic resilience and warned that “new shocks in different shapes and sizes” will keep coming. (*The Edge Malaysia*)
- [China ramps up 'high stakes' tech race with US as economic imbalances deepen](#) China on Thursday set out a five-year roadmap to turbocharge scientific breakthroughs and embed AI across its industrial economic machine, framing technological dominance as a core national security goal in its sharpening rivalry with the US. (*The Edge Malaysia*)

Malaysia

- [Holds OPR steady as resilient growth and contained inflation keep policy on pause](#) Bank Negara Malaysia's (BNM) Monetary Policy Committee (MPC) kept the Overnight Policy Rate (OPR) unchanged at 2.75% at its March 2026 meeting, in line with our house view and market expectations. Outlook: No change to our OPR view, policy rate is expected to stay unchanged at 2.75% through 2026. (*See Economic Viewpoint: BNM MPC Meeting (5 March)*)
- [Anwar: National energy supply secure, contingency plans ready to safeguard economy](#) Prime Minister Datuk Seri Anwar Ibrahim on Thursday said Malaysia's oil and gas supply remains secure and that the government will continue to closely monitor global developments amid the current conflict in the Middle East. (*The Edge Malaysia*)
- [Over 60.0% of Malaysian exporters likely affected by Middle East conflict — Matrade survey](#) The Malaysia External Trade Development Corporation (Matrade) said a survey shows over 60% of Malaysian exporters expect to be impacted by the Middle East conflict due to shipment delays and higher shipping and insurance costs. (*The Edge Malaysia*)
- [Govt analysing cost-push inflation risk amid Middle East conflict](#) The government is studying the risk of cost-push inflation in light of the ongoing conflict in the Middle East that has driven up oil prices and fuel costs, said Deputy Economy Minister Datuk Mohd Shahar Abdullah. (*The Edge Malaysia*)
- [MOF: RON95 subsidy down to MYR1.8b in 4Q2025](#) RON95 subsidies for the fourth quarter (4Q) of 2024 amounted to MYR3.0b, before declining to MYR1.8b in 4Q2025, according to the Ministry of Finance (MOF). The ministry said this resulted in savings of around MYR1.2b following the implementation of targeted subsidies through the Budi95 initiative, as well as the decline in oil market prices. (*The Edge Malaysia*)
- [Food supply stable despite Middle East tensions, says Mat Sabu](#) Malaysia's food supply remains stable despite escalating tensions between Iran and the United States as most imports are sourced from other regions, says Agriculture and Food Security Minister Mohamad Sabu. (*The Star*)

Asia Pacific

- [BOJ is said to keep april hike on table with eyes on Iran crisis](#) Bank of Japan officials are still on track to raise interest rates, with the possibility of April not ruled out, as they continue to monitor the implications of Middle East tensions for Japan's economy, according to people familiar with the matter. (*Bloomberg*)
- [Muted inflation in Thailand may cushion oil-driven price surge](#) Thailand's nearly yearlong stretch of falling consumer prices may now provide a buffer against potential energy-driven inflation spike. The consumer price index fell 0.88% in February from a year earlier, marking the 11th straight month of negative headline rate, Commerce Ministry data showed Thursday. (*The Edge Malaysia*)

Americas

- [US productivity tops forecast in 4Q as firms seek to contain costs](#) US labour productivity rose in the fourth quarter (4Q) by more than forecast, adding to evidence that companies are striving for greater efficiency to contain costs. Productivity, or non-farm employee output per hour, increased at a 2.8% annualised rate after an upwardly revised 5.2% advance in the third quarter, data from the Bureau of Labor Statistics (BLS) showed on Thursday. (*The Edge Malaysia*)

Europe

- [ECB's Villeroy sees no reason for ECB to raise interest rates for now](#) Bank of France Governor and European Central Bank policy maker Francois Villeroy de Galhau said on Thursday that he saw no reason for the ECB to raise its interests rates, despite the on-going conflict in the Middle-East, and that financial stability is currently not at risk. (*Reuters*)



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List of Oversold Stocks (14-Day RSI<30-mark)

NAME*	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	LOW 30D
SUPERCOMNET TECHNOLOGIES BHD	0.510	11.06	6.75	0.67	0.500
PIE INDUSTRIAL BHD	1.350	15.75	13.51	3.06	1.340
V.S. INDUSTRY BERHAD	0.315	17.12	10.42	0.53	0.310
D&O GREEN TECHNOLOGIES BHD	0.420	17.42	12.67	1.77	0.390
ANN JOO RESOURCES BHD	0.440	20.79	19.49	18.98	0.435
INSAS BHD	0.855	24.23	12.96	0.22	0.845
SKP RESOURCES BHD	0.445	24.24	19.46	15.97	0.435
WELLCALL HOLDINGS BHD	1.250	24.56	15.69	0.83	1.240
KUMPULAN PERANGSANG SELANGOR	0.565	24.77	16.67	3.65	0.560
WCT HOLDINGS BHD	0.495	24.89	17.68	2.30	0.495
TALIWORKS CORP BHD	0.430	24.98	20.12	4.77	0.430
PBA HOLDINGS BHD	1.840	25.85	16.41	1.31	1.840
TMK CHEMICAL BHD	1.160	26.21	21.49	6.99	1.150
TAN CHONG MOTOR HOLDINGS BHD	0.510	26.89	20.06	11.93	0.505
HONG LEONG CAPITAL BHD	3.300	26.91	19.15	16.96	3.280
BERJAYA LAND BHD	0.260	27.23	14.46	0.20	0.255
AIRASIA X BHD	1.420	27.51	19.82	3.68	1.410
JCY INTERNATIONAL BHD	0.315	27.87	18.70	2.78	0.315
AMWAY MALAYSIA HOLDINGS BHD	4.930	28.48	21.90	21.41	4.900
PLENITUDE BHD	1.680	28.96	23.89	18.13	1.660
LUXCHEM CORP BHD	0.360	29.28	26.33	30.88	0.355
SUPERMAX CORP BHD	0.260	29.55	27.21	30.09	0.250
MATRIX CONCEPTS HOLDINGS BHD	1.350	29.65	18.39	0.59	1.330
COASTAL CONTRACTS BHD	1.190	29.85	23.56	12.18	1.140

*Only for stocks with market cap >RM300m

Source: Bloomberg

List of Overbought Stocks (14-Day RSI>70-mark)

NAME*	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	HIGH 30D
GUOCOLAND MALAYSIA BHD	1.060	82.13	81.47	59.51	1.070
PARAGON UNION BHD	4.000	79.01	75.14	45.57	4.210
HIBISCUS PETROLEUM BHD	1.980	76.97	80.60	84.12	2.040
PETRON MALAYSIA REFINING & M	4.790	76.70	79.49	80.49	5.000
TA ANN HOLDINGS BERHAD	4.830	73.97	78.33	90.70	4.860
MIKRO MSC BHD	0.440	72.72	68.82	49.55	0.455

*Only for stocks with market cap >RM300m

Source: Bloomberg

List of Oversold Warrants (14-Day RSI<30-mark)

NAME	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	LOW 30D	EXPIRY DATE
YTL CORP BHD-M	0.020	10.88	6.99	0.21	0.020	14/10/2026
YTL CORP BHD-I	0.025	13.59	8.30	1.09	0.025	8/9/2026
YTL POWER INTERNATIONAL BHD-I	0.025	15.45	9.57	2.05	0.025	8/9/2026
YTL CORP BHD-K	0.030	15.72	14.77	11.14	0.030	24/8/2026
CAHYA MATA SARAWAK BHD-C75	0.040	17.06	9.95	0.62	0.040	31/7/2026
HANG SENG INDEX-OS	0.150	19.22	18.58	14.28	0.125	29/4/2026
EG INDUSTRIES BHD-CM	0.055	25.00	21.76	4.80	0.055	24/9/2026
HANG SENG INDEX-MW	0.040	25.40	23.50	13.14	0.030	30/3/2026
YINSON HOLDINGS BHD-C51	0.035	26.09	16.65	0.28	0.025	30/4/2026
GAMUDA BHD-E	0.030	26.57	27.87	26.42	0.030	23/7/2026
CAPITAL A BHD-WA	0.245	27.11	17.69	2.73	0.240	29/12/2028
MMAG HOLDINGS BHD-WC	0.015	27.51	22.15	2.50	0.010	15/1/2029
HANG SENG INDEX-OK	0.325	27.86	21.63	9.76	0.285	29/4/2026
99 SPEED MART RETAIL HOLDINGS BHD-C30	0.050	28.35	30.66	45.29	0.040	3/8/2026
HANG SENG INDEX-OL	0.150	28.67	24.12	21.67	0.130	29/4/2026
HANG SENG INDEX-OI	0.020	29.31	24.06	11.57	0.015	30/3/2026
AIRASIA X BHD-C31	0.040	29.37	22.01	4.94	0.035	14/9/2026
YINSON HOLDINGS BHD-C54	0.015	29.62	22.62	2.85	0.010	30/4/2026
SOUTHERN CABLE GROUP BHD-CQ	0.055	29.69	23.50	5.10	0.055	31/7/2026
HANG SENG INDEX-MI	0.060	29.88	24.12	9.37	0.055	29/4/2026
DUFU TECHNOLOGY CORP BHD-C3	0.080	29.90	24.30	7.25	0.075	30/6/2026

Source: Bloomberg

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List of Overbought Warrants (14-Day RSI>70-mark)

NAME	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	HIGH 30D	EXPIRY DATE
HENGYUAN REFINING CO BHD-WA	0.745	87.19	89.56	96.21	0.810	27/10/2030
HIBISCUS PETROLEUM BHD-C89	0.175	80.77	83.34	84.65	0.195	24/8/2026
YTL CORP BHD-HI	0.360	80.29	85.18	94.95	0.360	30/6/2026
DIALOG GROUP BHD-U	0.105	72.73	74.11	81.01	0.110	24/9/2026
HIBISCUS PETROLEUM BHD-C83	0.110	71.60	75.90	75.93	0.135	30/4/2026

Source: Bloomberg

Stock Ratings are defined as follows:**Stock Recommendations**

OUTPERFORM	: A particular stock's Expected Total Return is MORE than 10%
MARKET PERFORM	: A particular stock's Expected Total Return is WITHIN the range of -5% to 10%
UNDERPERFORM	: A particular stock's Expected Total Return is LESS than -5%

Sector Recommendations***

OVERWEIGHT	: A particular sector's Expected Total Return is MORE than 10%
NEUTRAL	: A particular sector's Expected Total Return is WITHIN the range of -5% to 10%
UNDERWEIGHT	: A particular sector's Expected Total Return is LESS than -5%

*****Sector recommendations are defined based on market capitalisation weighted average expected total return for stocks under our coverage.**

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