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BURSA	17-Mar	Day chg	% chg
KLCI	1,711.0	14.43	0.85%
FTSE EMAS	12,486.0	101.2	0.82%
FTSE Smallcap	15,279.7	128.59	0.85%
FTSE MESDAQ	4,413.9	39.4	0.90%
KLSE Mkt Cap (RM'b)	1,986.3	16.7	0.84%

BURSA DAILY TRADING PARTICIPATION

Participation	Net (RM'm)	Value (%)
Local Institution	-93.2	41.2%
Local Retail	-66.4	16.6%
Foreign	159.6	42.2%

INDICES	17-Mar	Day chg	% chg
Dow Jones	46,993.3	46.8	0.10%
S&P 500	6,716.1	16.7	0.25%
NASDAQ	22,479.5	105.3	0.47%
FTSE-100	10,403.6	85.9	0.83%
Nikkei 225	53,700.4	-50.8	-0.09%
SHCOMP	4,049.9	-34.9	-0.85%
HSI	25,868.5	34.5	0.13%
STI	4,936.0	67.3	1.38%
KOSPI	5,640.5	90.6	1.63%
TWSE	33,836.6	494.1	1.48%
JCI	7,106.8	84.6	1.20%
SET	1,433.9	28.9	2.05%

FOREX	17-Mar	16-Mar	% chg
USD/MYR:	3.9177	3.9285	-0.27%
EUR/USD:	1.1506	1.1475	0.27%
GBP/USD:	1.3324	1.3272	0.39%
USD/YEN:	159.12	159.23	-0.07%
USD/SGD:	1.2782	1.2790	-0.06%
USD/HKD:	7.8367	7.8306	0.08%

KEY STATS

KLCI Spot			
Vol (m shares):	2,821.2	2,382.9	18.39%
Value (RMm):	2,764.3	2,564.2	7.81%
KLCI Future			
March-26	1,713.0	1,686.5	1.57%
April-26	1,713.5	1,688.0	1.51%
CPO Price (RM/tonne)	4,581.0	4,654.0	-1.57%
Soybean (US\$/bu)	1,157.0	1,155.3	0.15%
SoyOil (USc/lb)	65.7	63.6	3.30%
Gold (US\$/troy oz)	5,008.2	5,002.2	0.12%
Nymex crude oil (US\$/bbl)	96.2	93.5	2.90%
Latex (RM/kg)	6.8	6.70	0.75%
Tin (US\$/mt)	46,522.0	48,174.0	-3.43%

Research Highlights

NEWS HIGHLIGHTS

- AWC secures RM26.0m contract to provide support services at Hospital Shah Alam
- Rivertree STF unit wins RM2.3m job
- Marine & General's Q3 earnings, revenue rise on higher charter rates
- Khee San confirms regularisation plan completion, eyes PN17 exit
- Hextar Capital bags RM75.9m earth works sub-contract in Tawau

MACRO BITS

- EU has adapted to US unpredictability, foreign policy chief says
- China's fuel export ban to further tighten Asia supply
- PM announces 50.0% toll discount for Aidilfitri travel, costing govt MYR21.0m
- Johari to continue talks with US on Reciprocal Trade Agreement
- Malaysia's ECRL enters testing phase as 519km Kota Bharu-Gombak track completed
- Hire-Purchase (Amendment) Act 2026 allow providers to offer fixed rate, variable rate loans — BNM
- Gig economy commission to discuss e-hailing fare policy, says Loke
- Launch of Johor-Singapore Special Economic Zone master plan, blueprint postponed
- Domestic tourism maintains encouraging growth, records 290.1m visitors in 2025 — DOSM
- Indonesia tightens FX rules, supports rupiah with hawkish hold
- Brazil central bank to make more rate decisions with board vacancies, sources say
- UK to devolve more fiscal powers to regions, finance minister Reeves says

IDEAS OF THE DAY (SEE SEPARATE REPORTS FOR DETAILS)

- Sector Update: Property (Penang Study Trip)

#	Top Volume			Top Gainer			Top Loser					
	Stock	Price	%Chg (+/-)	Vol (m)	Stock	Price	%Chg (+/-)	Vol (m)	Stock	Price	%Chg (+/-)	Vol (m)
1	SIME	2.34	-0.4	26.10	PCEM	4.95	8.1	26.00	CDB	3.14	-1.6	4.38
2	PCEM	4.95	8.1	26.00	YTL	1.73	4.2	20.90	NESTLE	100.90	-1.3	0.07
3	PBBANK	4.86	1.3	23.30	YTLPOWR	2.87	3.6	11.60	SDG	5.75	-0.9	14.30
4	YTL	1.73	4.2	20.90	MRDIY	1.65	2.5	7.98	SIME	2.34	-0.4	26.10
5	MAYBANK	11.60	1.1	18.70	PPB	11.40	2.3	1.12	PMETAL	7.60	-0.1	14.10
6	SDG	5.75	-0.9	14.30	SUNWAY	5.25	1.9	6.92	KLK	19.60	-0.1	0.32
7	PMETAL	7.60	-0.1	14.10	AMBANK	6.61	1.7	8.12	99SMART	3.55	0.0	1.65
8	CIMB	7.86	0.8	12.70	HLBANK	22.80	1.6	0.80	MAXIS	3.72	0.0	3.34
9	GAMUDA	4.17	0.5	12.00	PBBANK	4.86	1.3	23.30	PETGAS	17.60	0.0	0.42
10	YTLPOWR	2.87	3.6	11.60	RHBBANK	8.35	1.2	5.47	N.A.	N.A.	0.0	0.00

Notes: # KL Composite Index (FBMKLCI) component stocks

Corporate News

- **AWC secures RM26.0m contract to provide support services at Hospital Shah Alam**

AWC Bhd said it has secured a RM26.1m contract from the Health Ministry to provide hospital support services at Hospital Shah Alam. The one-year contract, running from Jan 1 to Dec 31, 2026, is a continuation of services that AWC has been providing at the hospital since 2021, the engineering services provider said in a filing with the stock exchange. (*The Edge Malaysia*)

- **Rivertree STF unit wins RM2.3m job**

Rivertree STF Synergies Bhd has secured a RM2.3m contract for earthwork and piling works linked to a labour quarters development project. The group said its wholly owned unit, RSSB Builders Sdn Bhd, had accepted a letter of award from Q Centre (Teratai) Sdn Bhd for works involving two blocks of labour quarters with a capacity of 4,560 beds. The project also includes a gymnasium and a shop unit. (*The Star*)

- **Marine & General's Q3 earnings, revenue rise on higher charter rates**

Marine & General Bhd (M&G) recorded a higher net profit of RM3.6m for the third quarter ended Jan 31 2026 against RM2.6m a year ago. M&G's revenue for the quarter grew 7.3% to RM79.6m, while nine-month cumulative turnover stood at RM277.2m from RM258.4m previously. This was, buoyed by stronger performance in its upstream segment and stable offshore demand. The upstream division remained the group's primary engine, contributing 79.0% of quarterly revenue. (*New Straits Times*)

- **Khee San confirms regularisation plan completion, eyes PN17 exit**

Khee San Bhd has confirmed the completion of its regularisation plan and is now eyeing an exit from its Practice Note 17 (PN17) status as well as a return as the market leader in the confectionery industry. The plan's completion follows the effective implementation of its employees' share scheme (ESS) on Tuesday (17 Mar), the candy maker said in a statement. "The completion of our regularisation plan is a monumental achievement for Khee San. Today, the group stands well-positioned to reclaim its position as a market leader in the confectionery industry," said Khee San managing director. (*The Edge Malaysia*)

- **Hextar Capital bags RM75.9m earth works sub-contract in Tawau**

Hextar Capital Bhd has bagged a RM75.9m sub-contract to undertake geotechnical and earth works for a housing project for families of armed forces personnel in Tawau, Sabah. The group said the project at Kem Kabota will commence immediately and is expected to be completed within 12 months. Hextar Capital managing director said the contract win marks a strategic advancement for the group as it accelerates its footprint in East Malaysia. (*The Edge Malaysia*)



Macro Bits

Global

- [EU has adapted to US unpredictability, foreign policy chief says](#) The European Union has started taking the unpredictability of the United States into account one year after President Donald Trump returned to the White House, EU foreign policy chief Kaja Kallas said on Tuesday. *(Reuters)*
- [China's fuel export ban to further tighten Asia supply](#) China's ban on exports of diesel, gasoline and jet fuel is poised to exacerbate fuel shortages and further boost prices for Asian industry and transportation buyers already grappling with tightening supplies caused by the U.S.-Israeli war against Iran. *(Reuters)*

Malaysia

- [PM announces 50.0% toll discount for Aidilfitri travel, costing govt MYR21.0m](#) The Malaysian government will grant a 50.0% toll discount on most highways nationwide in conjunction with the upcoming Hari Raya Aidilfitri, a move that will cost the government about MYR21.03m. *(The Edge Malaysia)*
- [Johari to continue talks with US on Reciprocal Trade Agreement](#) Investment, Trade and Industry (MITI) Minister Datuk Seri Johari Abdul Ghani is expected to continue engagements with the US following recent developments surrounding the Reciprocal Trade Agreement (ART), as Putrajaya seeks further clarity on the issue. *(The Malaysian Reserve)*
- [Malaysia's ECRL enters testing phase as 519km Kota Bharu-Gombak track completed](#) Malaysia's flagship East Coast Rail Link (ECRL), a major rail project designed to connect the country's less-developed east coast states with the Klang Valley economic hub, entered into its testing and commissioning phase following the completion of track construction and key system installations. *(The Edge Malaysia)*
- [Hire-Purchase \(Amendment\) Act 2026 allow providers to offer fixed rate, variable rate loans — BNM](#) The Hire-Purchase (Amendment) Act 2026 (HPAA) continues to allow hire-purchase providers to offer both fixed-rate and variable-rate loans, said Bank Negara Malaysia (BNM). The central bank said customers will continue to have the option to choose a fixed-rate or variable-rate hire-purchase loan. *(The Edge Malaysia)*
- [Gig economy commission to discuss e-hailing fare policy, says Loke](#) The absence of a minimum or floor fare policy in the local e-hailing industry, which has become a concern for e-hailing driver groups, will be discussed by the Malaysian Gig Economy Commission, (SEGIM). Transport Minister Anthony Loke added that any policy changes in the e-hailing industry must be carefully studied as they could have wide-ranging implications on the entire service ecosystem. *(The Edge Malaysia)*
- [Launch of Johor-Singapore Special Economic Zone master plan, blueprint postponed](#) The launch of the master plan and blueprint for the Johor-Singapore Special Economic Zone (JS-SEZ), scheduled for March 30 in Johor Bahru, has been postponed until a date to be announced. The Economy Ministry said in a statement that this was the decision of a Cabinet meeting chaired by Prime Minister Datuk Seri Anwar Ibrahim, who is also the finance minister, on Tuesday. *(The Edge Malaysia)*
- [Domestic tourism maintains encouraging growth, records 290.1m visitors in 2025 — DOSM](#) The tourism sector has maintained encouraging growth in 2025, with the total number of domestic visitors reaching 290.1 million. Chief statistician Datuk Seri Dr Mohd Uzir Mahidin said the figures represent an 11.5% increase compared with 260.1 million visitors in 2024. *(The Edge Malaysia)*

Asia Pacific

- [Indonesia tightens FX rules, supports rupiah with hawkish hold](#) Indonesia's central bank tightened foreign-exchange regulations as policymakers in Southeast Asia's biggest economy try to soften the impact of the Middle East war on inflation and the rupiah. *(The Edge Malaysia)*

Americas

- [Brazil central bank to make more rate decisions with board vacancies, sources say](#) Brazil's central bank will make another interest rate decision this week with two empty seats on its monetary policy committee, which may remain open for several more months given tensions between the government and Senate leaders, people familiar with the matter said. *(Reuters)*

Europe

- [UK to devolve more fiscal powers to regions, finance minister Reeves says](#) British finance minister Rachel Reeves said she is looking at ways to devolve more fiscal powers to different regions within the country, including some control of taxes, as part of efforts to drive growth and productivity. She said on Tuesday that officials were working to "develop a roadmap for future fiscal devolution" which would be published at this year's budget. *(Reuters)*



18 March 2026

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

NAME*	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	LOW 30D
PIE INDUSTRIAL BHD	1.130	14.99	13.69	15.51	1.100
WCT HOLDINGS BHD	0.430	22.27	19.54	21.22	0.425
KIMLUN CORP BHD	1.110	24.30	18.48	7.26	1.110
PADINI HOLDINGS BERHAD	1.720	27.80	21.92	15.62	1.720
COASTAL CONTRACTS BHD	1.130	28.55	24.48	16.31	1.100
ORIENTAL INTEREST BHD	1.250	28.90	23.05	11.70	1.240
NESTLE (MALAYSIA) BERHAD	100.900	29.11	26.49	17.22	100.300
TALIWORKS CORP BHD	0.420	29.56	30.13	49.80	0.400
V.S. INDUSTRY BERHAD	0.300	29.93	33.60	58.75	0.280

*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
PARAGON UNION BHD	4.090	84.43	86.27	98.01	4.210
GUOCOLAND MALAYSIA BHD	1.060	76.99	70.83	59.99	1.070
TDM BHD	0.215	75.98	82.23	96.85	0.215
TA ANN HOLDINGS BERHAD	5.180	75.77	78.18	87.06	5.240
SARAWAK OIL PALMS BERHAD	4.470	75.15	78.07	80.46	4.490
TH PLANTATIONS BHD	0.660	74.81	79.83	95.52	0.665
GENTING PLANTATIONS BHD	5.200	73.06	80.93	97.47	5.220
ANN JOO RESOURCES BHD	0.600	71.09	79.57	98.05	0.615

*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-I	0.025	22.12	24.67	71.18	0.020	8/9/2026
MALAYAN CEMENT BHD-CJ	0.080	22.62	16.65	14.68	0.060	27/4/2026
YTL CORP BHD-M	0.020	24.90	30.42	64.06	0.015	14/10/2026
YTL CORP BHD-H	0.025	26.33	20.38	12.74	0.020	28/7/2026
HANG SENG INDEX-MW	0.020	26.65	25.75	21.45	0.010	30/3/2026
HANG SENG INDEX-OS	0.160	27.86	32.62	53.14	0.100	29/4/2026
AIRASIA X BHD-C31	0.025	28.89	23.66	39.26	0.010	14/9/2026

Source: Bloomberg

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

NAME	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	HIGH 30D	EXPIRY DATE
PETRONAS CHEMICALS GROUP BHD-C	0.305	76.43	79.20	85.86	0.370	26/10/2026
PETRONAS CHEMICALS GROUP BHD-Z	0.100	75.50	80.17	88.18	0.165	29/5/2026
PETRONAS CHEMICALS GROUP BHD-A	0.190	74.67	77.34	82.46	0.195	26/5/2026
PETRONAS CHEMICALS GROUP BHD-B	0.205	72.98	74.74	78.06	0.210	30/6/2026
PETRONAS CHEMICALS GROUP BHD-D	0.255	72.90	76.01	81.62	0.310	27/8/2026

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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Published by:

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