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BURSA	24-Apr	Day chg	% chg
KLCI	1,720.3	-1.36	-0.08%
FTSE EMAS	12,715.7	9.6	0.08%
FTSE Smallcap	15,661.1	125.62	0.81%
FTSE MESDAQ	4,652.3	16.6	0.36%
KLSE Mkt Cap (RM'b)	2,057.2	3.4	0.16%

BURSA DAILY TRADING PARTICIPATION

Participation	Net (RM'm)	Value (%)
Local Institution	106.7	46.7%
Local Retail	-150.5	30.1%
Foreign	43.8	23.2%

INDICES	24-Apr	Day chg	% chg
Dow Jones	49,230.7	-79.6	-0.16%
S&P 500	7,165.1	56.7	0.80%
NASDAQ	24,836.6	398.1	1.63%
FTSE-100	10,379.1	-77.9	-0.75%
Nikkei 225	59,716.2	575.9	0.97%
SHCOMP	4,079.9	-13.3	-0.33%
HSI	25,978.1	62.9	0.24%
STI	4,922.9	-21.3	-0.43%
KOSPI	6,475.6	-0.2	0.00%
TWSE	38,932.4	1,218.3	3.23%
JCI	7,129.5	-249.1	-3.38%
SET	1,456.1	-5.3	-0.36%

FOREX	24-Apr	23-Apr	% chg
USD/MYR:	3.9650	3.9650	0.00%
EUR/USD:	1.1722	1.1682	0.34%
GBP/USD:	1.3532	1.3484	0.36%
USD/YEN:	159.38	159.72	-0.21%
USD/SGD:	1.2753	1.2773	-0.16%
USD/HKD:	7.8356	7.8327	0.04%

KEY STATS

KLCI Spot			
Vol (m shares):	3,229.8	3,485.4	-7.34%
Value (RMm):	3,255.0	3,107.4	4.75%
KLCI Future			
April-26	1,714.5	1,717.5	-0.17%
May-26	1,716.5	1,719.0	-0.15%
CPO Price (RM/tonne)	4,597.0	4,579.0	0.39%
Soybean (US\$/bu)	1,163.8	1,159.8	0.34%
SoyOil (USc/lb)	71.3	71.1	0.39%
Gold (US\$/troy oz)	4,740.9	4,724.0	0.36%
Nymex crude oil (US\$/bbl)	94.4	95.9	-1.51%
Latex (RM/kg)	7.58	7.59	-0.13%
Tin (US\$/mt)	50,198.0	50,053.0	0.29%

Research Highlights

NEWS HIGHLIGHTS

- **Petra Energy bags offshore services contract from Vestigo Petroleum**
- **SCIB bags RM32.8m EPCC contract for Sabah school project**
- **Mesiniaga bags RM51.6m IT services contract from Maybank unit**
- **ManagePay appointed to provide open payment system to East Coast Rail Link**
- **Chuan Huat exits Pineapple Resources with RM26.0m stake sale, triggers MGO**

MACRO BITS

- **Asian factories struggle as soft China, US demand takes toll**
- **E-hailing drivers, boat owners to get additional RON95 subsidy benefits by mid-October — MOF**
- **Budi95: Renewal of 300-litre quota on first day of every month, says Fahmi**
- **Asean policymakers express concern on steel standards in the region, says deputy minister**
- **Autogates to be installed at 123 entry points in 2Q2026, says home minister**
- **EPF: Non-Malaysian employees to start mandatory contributions from October 2025 wages**
- **Budi95 sales top MYR91.0m in four days, says Amir Hamzah**
- **Gobind: System used in Budi95 secure from cyber threats**
- **China September new home prices edge up, resale market falls: survey**
- **Japan business mood improves, clears another hurdle for BOJ rate hike**
- **US manufacturing activity contracts for seventh straight month**
- **Canadian manufacturing PMI falls in September as downturn deepens**

IDEAS OF THE DAY (SEE SEPARATE REPORTS FOR DETAILS)

- **Market Strategy: No Longer Taking at Face Value**
- **Thematic: Utilities**
- **Results Note: UNISEM**
- **Company Update: YTLPOWER**
- **Weekly Technical Review: DJIA, KLCI**

#	Top Volume			Top Gainer			Top Loser					
	Stock	Price	%Chg (+/-)	Vol (m)	Stock	Price	%Chg (+/-)	Vol (m)	Stock	Price	%Chg (+/-)	Vol (m)
1	YTLPOWER	3.90	-1.0	35.50	PMETAL	8.42	4.3	21.60	GAMUDA	4.30	-3.6	24.20
2	SUNMED	1.92	1.6	24.90	MRDIY	1.70	1.8	7.35	SIME	2.15	-1.8	6.32
3	GAMUDA	4.30	-3.6	24.20	SUNMED	1.92	1.6	24.90	AXIATA	2.24	-1.8	3.04
4	PMETAL	8.42	4.3	21.60	NESTLE	99.30	1.3	0.07	YTLPOWER	3.90	-1.0	35.50
5	MAYBANK	11.16	-0.5	15.50	SDG	6.00	0.5	12.00	PICHEM	5.50	-0.9	11.60
6	SDG	6.00	0.5	12.00	TENAGA	14.66	0.4	2.04	PETDAG	20.42	-0.8	0.23
7	PICHEM	5.50	-0.9	11.60	CIMB	7.80	0.3	10.00	CDB	2.97	-0.7	0.62
8	PBBANK	4.81	-0.6	10.60	RHBBANK	8.25	0.2	4.41	PBBANK	4.81	-0.6	10.60
9	CIMB	7.80	0.3	10.00	TM	7.10	0.1	3.48	MAYBANK	11.16	-0.5	15.50
10	IHH	8.82	-0.3	8.46	99SMART	3.52	0.0	4.52	YTL	2.01	-0.5	7.17

Notes: # KL Composite Index (FBMKLCI) component stocks

Corporate News

- **Petra Energy bags offshore services contract from Vestigo Petroleum**

Petra Energy Bhd has secured a contract from Vestigo Petroleum Sdn Bhd to provide field operations management services (FOMS) for offshore facilities in Sarawak. The upstream oil and gas services company said the letter of award was received by its wholly owned unit, Petra Energy Development Sdn Bhd, on March 27. The contract covers the SK407 production sharing contract (PSC) and associated facilities offshore Miri, comprising five fields — West Lutong, Baram, Tukau, Siwa and Fairly Baram. (*The Edge Malaysia*)

- **SCIB bags RM32.8m EPCC contract for Sabah school project**

Sarawak Consolidated Industries Bhd has secured a RM32.8m engineering, procurement, construction and commissioning (EPCC) contract for a school project in Sabah. The industrialised building systems player said its wholly owned subsidiary, SCIB Industrialised Building System Sdn Bhd had received a letter of award from Belian Juta Sdn Bhd for the construction of a new secondary school, Sekolah Menengah Kebangsaan (SMK) Balaban Jaya in Beluran, Sabah. (*The Edge Malaysia*)

- **Mesiniaga bags RM51.6m IT services contract from Maybank unit**

Mesiniaga Bhd has bagged a RM51.6m contract from Malayan Banking Bhd's unit for the subscription of cloud infrastructure software and support services. The group said it had accepted a purchase order from Maybank Shared Services Sdn Bhd for the subscription of Nutanix Cloud Infrastructure, including ultimate software licences and mission-critical support services. Mesiniaga said the contract will run for 60 months and is scheduled for completion by April 30, 2031, adding that it does not include an automatic renewal clause. (*The Edge Malaysia*)

- **ManagePay appointed to provide open payment system to East Coast Rail Link**

ManagePay Systems Bhd has secured a contract to provide an open payment system for the East Coast Rail Link (ECRL) passenger ticketing system. The Letter of Award (LOA), covering supply, deliver, installation, integration, testing, commissioning and maintenance, was awarded to its unit, ManagePay Services Sdn Bhd, from ECRL Operations Sdn Bhd on Wednesday (April 22). ECRL Operations is the joint venture between Malaysia Rail Link Sdn Bhd and China Communications Construction Co Ltd, which will manage rail operations slated to commence in January 2027. (*The Edge Malaysia*)

- **Chuan Huat exits Pineapple Resources with RM26.0m stake sale, triggers MGO**

Chuan Huat Resources Bhd is exiting its loss-making subsidiary Pineapple Resources Bhd by disposing of its entire 63.86% stake comprising 31.0m shares for RM26.0m cash. The steel trader and manufacturer is looking to focus on its core businesses and unlock value from a non-core investment. As the combined shareholding in Pineapple Resources will rise from nil to 63.9%, the shareholder will be required to undertake a mandatory general offer (MGO) for the remaining shares not already owned by him and persons acting in concert, at 84 sen apiece. (*The Edge Malaysia*)



27 April 2026

Macro Bits

Global

- [Australia's Wong to visit Japan, China, South Korea to discuss energy security](#) Australia's Foreign Minister Penny Wong on Sunday said she would visit Japan, China, and South Korea this week for talks on energy security in the face of disruptions caused by the Middle East conflict. *(The Edge Malaysia)*

Malaysia

- [Govt considering road tax cut for diesel vehicles amid price hike — Anwar](#) The government is considering reducing road tax rates for diesel vehicles in the near term to ease the burden on the public following the rise in diesel prices. *(The Edge Malaysia)*
- [Zafrul: Global supply crisis presents opportunities, Malaysia remains safe investment destination](#) Senior Political Adviser to the Prime Minister Tengku Datuk Seri Zafrul Abdul Aziz said the global supply crisis should be viewed as an opportunity to strengthen Malaysia's position as a safe investment destination. *(The Edge Malaysia)*
- [MATRADE drives diversification programme amid global geopolitical uncertainties](#) Malaysia's trade strategy is now focusing on diversifying markets to reduce dependence on a particular region, while strengthening the resilience of the country's exports, especially amid global geopolitical uncertainties. *(The Malaysian Reserve)*
- [Investor interest remains intact amid global uncertainties — InvestPenang](#) Investor interest in Penang remains intact despite rising global uncertainties, underpinned by resilient demand in the electronics and electrical (E&E) sector and the state's strategic positioning within evolving global supply chains. *(The Edge Malaysia)*
- [Armizan: Subsidised Diesel Control System application for Sabah, Sarawak and Labuan opens on May 4](#) Domestic Trade and Cost of Living (KPDN) Minister Datuk Armizan Mohd Ali said applications for registration of the Subsidised Diesel Control System (SKDS) for land freight vehicles in Sabah, Sarawak and Labuan will be open starting May 4. *(The Edge Malaysia)*

Asia Pacific

- [Inflation looms as China's exporters boost prices on Iran costs](#) Chinese exporters are beginning to lift prices on everything from swimsuits to air conditioners as the Iran war drives up oil-linked input costs, signalling that global consumer goods inflation is likely to accelerate. *(The Edge Malaysia)*

Americas

- [US consumer sentiment slumps to record low in April; inflation expectations rise](#) U.S. consumer sentiment fell to a record low in April as households shrugged off a ceasefire in the war with Iran, remaining focused on the inflation fallout from the conflict. *(Reuters)*
- [US Senator Tillis says he's ready to advance confirmation of Warsh as Fed chair](#) Republican Senator Thom Tillis on Sunday said he would allow Senate confirmation of Federal Reserve chair nominee Kevin Warsh to go forward after the Department of Justice on Friday dropped an investigation into Fed Chair Jerome Powell that Tillis viewed as a threat to the central bank's political independence. *(Reuters)*
- [Bank of Canada to hold interest rates this year, show patience with energy inflation: Reuters poll](#) The Bank of Canada will hold its overnight rate steady next week and through the rest of the year, according to a majority of economists polled by Reuters, most of whom stuck to the same outlook they had before the U.S.-Israeli war with Iran. *(Reuters)*

Europe

- [UK retail sales rebound as drivers stock up on fuel](#) UK retail sales unexpectedly bounced back in March, with the country's motorists rushing to forecourts to fill up on fuel as petrol prices surged in light of conflict in the Middle East. *(Bloomberg)*
- [French consumer confidence falls sharply in April as war takes toll on economy](#) French consumer confidence fell sharply in April, recording its largest drop since the start of the Ukraine war in 2022, the INSEE official statistics agency said on Friday. *(Reuters)*



27 April 2026

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

NAME*	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	LOW 30D
FCW HOLDINGS BHD	1.610	28.37	18.87	1.78	1.610

*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	4.930	91.61	94.26	99.64	4.930
SAM ENGINEERING & EQUIPMENT	4.020	81.50	88.78	98.33	4.090
MALAYSIAN PACIFIC INDUSTRIES	37.840	78.28	83.56	87.40	38.600
PIE INDUSTRIAL BHD	1.960	76.67	84.50	94.40	1.980
PENTAMASTER CORP BHD	3.980	76.27	82.23	87.94	4.100
PMB TECHNOLOGY BHD	1.860	75.58	75.52	59.86	1.930
KELINGTON GROUP BHD	6.250	75.06	82.41	96.40	6.330
PERDANA PETROLEUM BHD	0.200	75.06	81.38	89.30	0.200
KOBAY TECHNOLOGY BHD	1.940	75.02	81.04	90.25	1.960
DUFU TECHNOLOGY CORP BHD	1.760	72.99	82.64	96.13	1.810
LUXCHEM CORP BHD	0.400	71.86	78.18	88.67	0.400
O.S.K. HOLDINGS BHD	1.760	71.46	77.66	83.88	1.770
TMK CHEMICAL BHD	1.630	71.37	74.27	85.23	1.630
MITRAJAYA HOLDINGS BHD	0.690	70.37	79.29	94.73	0.700
THONG GUAN INDUSTRIES BHD	1.490	70.32	73.57	87.48	1.530

*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
SUNWAY HEALTHCARE HOLDINGS BHD-CD	0.125	22.79	27.44	44.54	0.095	29/10/2026
SUNWAY HEALTHCARE HOLDINGS BHD-CB	0.140	25.43	30.39	50.93	0.110	30/9/2026
SUNWAY HEALTHCARE HOLDINGS BHD-CA	0.280	26.46	31.35	45.81	0.240	30/9/2026
SUNWAY HEALTHCARE HOLDINGS BHD-CC	0.135	27.42	33.28	50.97	0.115	29/10/2026

Source: Bloomberg

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

NAME	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	HIGH 30D	EXPIRY DATE
JENTAYU SUSTAINABLES BHD-WB	0.090	89.31	98.03	100.00	0.090	20/2/2032
VITROX CORP BHD-C19	0.180	85.41	92.06	99.69	0.185	29/10/2026
VITROX CORP BHD-C18	0.190	82.08	88.03	94.57	0.195	30/6/2026
UWC BHD-C19	0.385	81.29	88.31	98.70	0.385	30/6/2026
UWC BHD-C24	0.255	79.99	86.63	97.76	0.260	30/9/2026
GREATECH TECHNOLOGY BHD-C31	0.315	79.38	84.32	92.42	0.315	24/8/2026
GREATECH TECHNOLOGY BHD-C23	0.310	79.30	84.03	91.55	0.310	30/4/2026
UWC BHD-C22	0.165	78.76	86.52	98.26	0.165	23/7/2026
YTL POWER INTERNATIONAL BHD-I	0.110	78.35	84.48	94.91	0.110	8/9/2026
GREATECH TECHNOLOGY BHD-C26	0.130	77.16	82.01	91.39	0.135	29/5/2026
GREATECH TECHNOLOGY BHD-C29	0.095	76.59	83.23	93.42	0.095	5/10/2026
INARI AMERTRON BHD-M	0.180	76.30	80.82	87.12	0.185	2/2/2027
YTL POWER INTERNATIONAL BHD-G	0.100	74.74	77.54	74.60	0.110	31/7/2026
MI TECHNOVATION BHD-C46	0.165	74.08	82.08	97.02	0.170	30/9/2026
UNISEM M BHD-C57	0.185	74.02	71.46	48.97	0.205	29/10/2026
YTL POWER INTERNATIONAL BHD-L	0.110	72.77	78.43	89.80	0.110	28/12/2026
DUFU TECHNOLOGY CORP BHD-C3	0.150	72.34	82.09	91.16	0.165	30/6/2026
EG INDUSTRIES BHD-WD	0.490	71.51	82.04	98.87	0.500	31/12/2028
JAG BHD-WC	0.060	71.28	76.10	81.85	0.060	23/6/2029

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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