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BURSA	9-Jun	Day chg	% chg
KLCI	1,675.5	-4.0	-0.24%
FTSE EMAS	12,452.0	-18.1	-0.15%
FTSE Smallcap	15,287.8	68.2	0.45%
FTSE MESDAQ	4,727.7	79.3	1.71%
KLSE Mkt Cap (RM'b)	2,025.4	-2.0	-0.10%

BURSA DAILY TRADING PARTICIPATION

Participation	Net (RM'm)	Value (%)
Local Institution	135.3	39.2%
Local Retail	94.9	26.5%
Foreign	-230.2	34.3%

INDICES	9-Jun	Day chg	% chg
Dow Jones	50,872.1	86.1	0.17%
S&P 500	7,386.7	-19.1	-0.26%
NASDAQ	25,678.8	-250.8	-0.97%
FTSE-100	10,227.3	-145.9	-1.41%
Nikkei 225	65,416.6	1,392.0	2.17%
SHCOMP	4,010.0	50.7	1.28%
HSI	24,565.9	-91.2	-0.37%
STI	5,023.3	59.6	1.20%
KOSPI	8,096.9	612.5	8.18%
TWSE	44,704.4	1,201.7	2.76%
JCI	5,746.6	404.5	7.57%
SET	1,584.1	22.5	1.44%

FOREX	9-Jun	8-Jun	% chg
USD/MYR:	4.0605	4.0738	-0.33%
EUR/USD:	1.1565	1.1525	0.35%
GBP/USD:	1.3396	1.3342	0.40%
USD/YEN:	160.17	160.01	0.10%
USD/SGD:	1.2856	1.2887	-0.24%
USD/HKD:	7.8367	7.8361	0.01%

KEY STATS

KLCI Spot			
Vol (m shares):	3,763.7	3,478.5	8.20%
Value (RMm):	2,900.5	2,918.9	-0.63%
KLCI Future			
June-26	1,669.0	1,673.5	-0.27%
July-26	1,671.0	1,675.5	-0.27%
CPO Price (RM/tonne)			
Soybean (US\$/bu)	1,113.8	1,115.8	-0.18%
SoyOil (USc/lb)	73.6	73.3	0.38%
Gold (US\$/troy oz)	4,286.4	4,363.4	-1.76%
Nymex crude oil (US\$/bbl)	88.2	91.3	-3.40%
Latex (RM/kg)	7.65	7.63	0.26%
Tin (US\$/mt)	52,097.0	51,901.0	0.38%

Research Highlights

NEWS HIGHLIGHTS

- Tanco, China Mobile eye potential development of 50MW data centre in Negeri Sembilan
- DNeX unit secures 20.0% stake in Terengganu state-owned O&G JV
- Varia to jointly develop RM250.0m residential project in Johor Bahru
- Kee Ming wins RM21.0m data centre electrical subcontract
- ACE Market-bound MMCS posts RM3.0m net profit in 1Q26

MACRO BITS

- Taiwan eyes curbs on AI chip sales to China to align with US
- Anwar courts Japanese investments in semiconductors, AI and quantum computing
- 13MP agenda stays on track despite economic headwinds, energy constraints
- Putrajaya to tighten budget scrutiny under 13MP, prioritise high-impact projects, minister says
- No cut to Budi95 quota unless oil prices surge above USD200.0 — Amir Hamzah
- Malaysia govt funds to channel capital into firms adopting MY Value Up
- Indonesia hikes rates in surprise off-cycle move to prop up sinking rupiah
- Japan economy minister says he hopes BOJ works closely with government on policy
- Fed to hold rates this year, cut calls fade as war inflation persists, economists say: Reuters poll
- UK consumers up their spending in May after April drop

IDEAS OF THE DAY (SEE SEPARATE REPORTS FOR DETAILS)

- Market Strategy: When Capital Meets Value
- Company Update: DPHARMA, KOSSAN, WELLCHIP
- Economic Viewpoint: BNM International Reserves

#	Top Volume			Top Gainer	Price	%Chg (+/-)	Vol (m)	Top Loser	Price	%Chg (+/-)	Vol (m)
	Stock	Price	%Chg (+/-)								
1	CIMB	7.37	-0.3	25.00	94.44	2.7	0.25	SUNWAY	5.13	-2.3	4.23
2	MAYBANK	10.62	-0.8	23.10	1.58	1.3	13.50	PICHEM	5.45	-1.6	5.76
3	YTL	2.02	0.5	16.60	8.70	1.2	5.64	AXIATA	1.92	-1.5	10.20
4	MRDIY	1.58	1.3	13.50	2.05	1.0	4.09	CDB	2.74	-1.4	4.43
5	PBBANK	4.77	-0.2	12.60	8.96	0.7	9.75	MAXIS	3.23	-1.2	4.51
6	AXIATA	1.92	-1.5	10.20	2.02	0.5	16.60	PETGAS	17.32	-1.0	0.88
7	PMETAL	8.96	0.7	9.75	4.22	0.5	8.47	TM	7.36	-0.8	4.22
8	IOICORP	4.22	0.5	8.47	4.30	0.5	7.07	MAYBANK	10.62	-0.8	23.10
9	SDG	6.02	0.0	8.08	6.48	0.5	4.80	PPB	9.55	-0.5	0.78
10	YTLPOWR	4.04	-0.5	7.16	20.12	0.2	0.34	YTLPOWR	4.04	-0.5	7.16

Notes: # KL Composite Index (FBMKLCI) component stocks

Corporate News

- **Tanco, China Mobile eye potential development of 50MW data centre in Negeri Sembilan**

Tanco Holdings Bhd's indirect wholly owned subsidiary Tanco Dot Com Sdn Bhd had entered into a memorandum of understanding (MoU) with Hong Kong-based China Mobile International Ltd to explore the development and building of a 50-megawatt (MW) information technology load data centre in Negeri Sembilan. The construction and property development group said the MoU will remain in effect for one year and will be deemed to be renewed after the expiry of the said period unless terminated by either party. (*The Star*)

- **DNeX unit secures 20.0% stake in Terengganu state-owned O&G JV**

Dagang NeXchange Bhd is taking a 20.0% equity stake in an oil and gas (O&G) exploration joint venture formed with Terengganu Inc's energy arm TI Petroleum Sdn Bhd. In a statement, DNeX announced that its subsidiary Ping Petroleum Ltd will hold the equity interest in the joint venture called TI Exploration & Production Sdn Bhd (TI EP). However, DNEX did not reveal the investment value. (*The Edge Malaysia*)

- **Varia to jointly develop RM250.0m residential project in Johor Bahru**

Varia Bhd said it is partnering with a Johor-based property firm to develop a medium-cost residential project in Bandar Seri Alam, Johor Bahru. The company said its wholly-owned unit, Varia Southrise Sdn Bhd, has entered into a collaboration agreement with Seri Alam Properties Sdn Bhd. Under the agreement, the parties will jointly develop a 43,810 sq m freehold parcel in Mukim Plentong into a stratified medium-cost residential project comprising 645 apartment units. The project carries an estimated gross development value of about RM250.0m, Varia said. (*The Edge Malaysia*)

- **Kee Ming wins RM21.0m data centre electrical subcontract**

Kee Ming Group Bhd has secured a RM21.4m subcontract to undertake electrical engineering works for a hyperscale data centre project in Puncak Alam. The contract was awarded to the mechanical and electrical engineering (M&E) group's wholly-owned unit, Kee Ming Electrical Sdn Bhd, by an unnamed third-party contractor. Kee Ming said the contractor is involved in integrated M&E solutions, with expertise in data centre infrastructure, including power systems, cooling, and engineering, procurement and construction (EPC) services for mission-critical facilities. (*The Edge Malaysia*)

- **ACE Market-bound MMCS posts RM3.0m net profit in 1Q26**

ACE Market-bound MM Computer Systems Bhd (MMCS) posted a net profit of RM3.0m on revenue of RM29.82mil in the first quarter ended March 31, ahead of its Bursa Malaysia debut. The enterprise IT solutions provider recorded a profit before tax (PBT) of RM3.9m, translating into a PBT margin of 13.2%, while its profit after tax margin stood at 10.2%. During the quarter, the group also generated a healthy cash inflow from operating activities of RM3.7m. (*The Star*)



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Macro Bits

Global

- [Taiwan eyes curbs on AI chip sales to China to align with US](#) Taiwan authorities are considering much stricter export controls on AI chip sales to China to further align with US measures, an effort to address semiconductor smuggling that risks drawing a rebuke from Beijing. (*Bloomberg*)

Malaysia

- [Anwar courts Japanese investments in semiconductors, AI and quantum computing](#) Prime Minister Datuk Seri Anwar Ibrahim has called on Japanese companies to continue expanding their investments in Malaysia, particularly in high-technology sectors such as semiconductors, artificial intelligence (AI), quantum computing and digital industries. (*The Edge Malaysia*)
- [13MP agenda stays on track despite economic headwinds, energy constraints](#) The government will continue implementing its development agenda under the 13th Malaysia Plan, with planned development expenditure of about RM611.0b, despite global economic uncertainty and energy supply pressures. (*The Malaysian Reserve*)
- [Putrajaya to tighten budget scrutiny under 13MP, prioritise high-impact projects, minister says](#) Putrajaya will tighten scrutiny of government spending under the 13th Malaysia Plan, with ministries required to reassess and reprioritise budget proposals to ensure public funds are channelled into projects that deliver measurable economic impact, Economy Minister Akmal Nasrullah Mohd Nasir said. (*The Edge Malaysia*)
- [No cut to Budi95 quota unless oil prices surge above USD200.0 — Amir Hamzah](#) Malaysia will maintain the monthly subsidised fuel quota at 200 litres under the Budi Madani RON95 (Budi95) programme for now, said Finance Minister II Datuk Seri Amir Hamzah Azizan. (*The Edge Malaysia*)
- [Malaysia govt funds to channel capital into firms adopting MY Value Up](#) Malaysia's largest government-linked investment companies will set aside some of their funds to invest in companies that adopt MY Value Up recommendations. (*The Edge Malaysia*)

Asia Pacific

- [Indonesia hikes rates in surprise off-cycle move to prop up sinking rupiah](#) Indonesia's central bank unexpectedly raised interest rates by 25 basis points on Tuesday, in a rare off-cycle move to try to stabilise the rupiah currency after it hit a succession of record lows. (*Reuters*)
- [Japan economy minister says he hopes BOJ works closely with government on policy](#) Japan's Economic Revitalisation Minister Minoru Kiuchi said that he hoped the Bank of Japan (BOJ) works closely with the government to durably achieve its 2.0% inflation target. (*The Edge Malaysia*)

Americas

- [Fed to hold rates this year, cut calls fade as war inflation persists, economists say: Reuters poll](#) The U.S. Federal Reserve will hold its key interest rate for the rest of 2026, according to a strong majority of economists in a Reuters poll, the first clear consensus on that view this year as war-driven inflation proves more persistent than expected. (*Reuters*)

Europe

- [UK consumers up their spending in May after April drop](#) Consumers in Britain increased their spending in May after reducing it in April, but their expenditure on travel dropped for a third month in a sign of caution over the economic impact of the Iran war, surveys showed. (*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
TANCO HOLDINGS BHD	0.800	11.35	6.47	0.80	0.785
TMC LIFE SCIENCES BHD	0.440	17.92	9.86	1.14	0.435
KKB ENGINEERING BHD	1.050	24.75	20.37	20.82	0.980
MATRIX CONCEPTS HOLDINGS BHD	1.220	24.98	20.84	30.38	1.180
ENGTEX GROUP BHD	0.435	26.52	22.01	17.78	0.435
DELEUM BERHAD	1.120	27.65	20.33	4.21	1.110
D&O GREEN TECHNOLOGIES BHD	0.400	28.18	20.60	11.77	0.390
CB INDUSTRIAL PRODUCT HLDG	1.140	28.20	19.89	4.59	1.140
FCW HOLDINGS BHD	1.610	28.37	18.87	1.78	1.610
WASCO BHD	0.780	28.39	24.99	26.36	0.765
PETRON MALAYSIA REFINING & M	3.960	28.42	21.99	19.22	3.950
TEO SENG CAPITAL BHD	0.810	28.63	26.93	41.92	0.800
JAYA TIASA HOLDINGS BHD	1.040	29.43	24.91	15.12	1.020

*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
CONCRETE ENGINEERING PRODS	4.900	97.80	98.84	99.82	5.000
GIIB HOLDINGS BHD	0.460	86.34	85.53	71.84	0.480
MKH BHD	1.920	86.14	84.85	43.17	1.960
EG INDUSTRIES BHD	1.890	78.62	79.15	78.31	1.910
CRITICAL HOLDINGS BHD	1.130	78.15	81.83	95.96	1.180
IDEAL CAPITAL BHD	4.100	76.76	83.87	99.03	4.240
TMK CHEMICAL BHD	2.070	73.39	74.42	69.54	2.160
KIM LOONG RESOURCES BHD	2.700	71.13	78.75	94.91	2.850

*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
ZETRIX AI BHD-BM	0.105	22.49	26.59	35.75	0.105	30/12/2026
TENAGA NASIONAL BHD-P	0.065	23.09	13.61	0.35	0.060	27/8/2026
HANG SENG INDEX-QH	0.010	23.13	18.17	10.14	0.010	29/6/2026
HANG SENG INDEX-QQ	0.165	25.40	20.62	10.85	0.145	29/6/2026
HANG SENG INDEX-Q8	0.065	27.14	24.18	10.71	0.060	30/7/2026
SUNWAY HEALTHCARE HOLDINGS BHD-CD	0.070	28.44	33.08	56.24	0.060	29/10/2026
HANG SENG INDEX-QP	0.315	28.56	23.75	13.32	0.280	29/6/2026

Source: Bloomberg

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

NAME	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	HIGH 30D	EXPIRY DATE
EG INDUSTRIES BHD-WD	0.940	79.03	79.50	76.52	0.955	31/12/2028
EG INDUSTRIES BHD-CM	0.255	78.37	79.76	81.74	0.260	24/9/2026
EG INDUSTRIES BHD-CK	0.200	78.28	79.30	80.20	0.205	30/6/2026
MCLEAN TECHNOLOGIES BHD-WC	0.385	70.37	71.60	74.95	0.415	2/5/2031

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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