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BURSA	19-Jun	Day chg	% chg
KLCI	1,712.0	0.64	0.04%
FTSE EMAS	12,681.1	17.8	0.14%
FTSE Smallcap	15,545.4	46.98	0.30%
FTSE MESDAQ	4,792.5	32.3	0.68%
KLSE Mkt Cap (RM'b)	2,055.9	4.9	0.24%

BURSA DAILY TRADING PARTICIPATION

Participation	Net (RM'm)	Value (%)
Local Institution	-47.1	35.6%
Local Retail	-99.5	21.4%
Foreign	146.6	43.0%

INDICES	19-Jun	Day chg	% chg
Dow Jones	51,564.7	N.A.	N.A.
S&P 500	7,500.6	N.A.	N.A.
NASDAQ	26,517.9	N.A.	N.A.
FTSE-100	10,363.3	-36.4	-0.35%
Nikkei 225	71,250.1	196.6	0.28%
SHCOMP	4,090.5	N.A.	N.A.
HSI	23,924.8	N.A.	N.A.
STI	5,192.7	-20.1	-0.39%
KOSPI	9,052.4	-11.4	-0.13%
TWSE	46,465.2	N.A.	N.A.
JCI	6,177.1	4.8	0.08%
SET	1,572.5	-12.6	-0.79%

FOREX	19-Jun	18-Jun	% chg
USD/MYR:	4.1368	4.1170	0.48%
EUR/USD:	1.1471	1.1461	0.09%
GBP/USD:	1.3232	1.3229	0.02%
USD/YEN:	161.30	160.92	0.24%
USD/SGD:	1.2912	1.2909	0.02%
USD/HKD:	7.8370	7.8373	0.00%

KEY STATS

KLCI Spot			
Vol (m shares):	3,451.4	4,504.2	-23.37%
Value (RMm):	3,797.9	3,456.2	9.89%
KLCI Future			
June-26	1,716.0	1,718.0	-0.12%
July-26	1,717.0	1,720.0	-0.17%
CPO Price (RM/tonne)	4,646.0	4,573.0	1.60%
Soybean (US\$/bu)	1,122.75	1,122.8	N.A.
SoyOil (USc/lb)	68.43	68.4	N.A.
Gold (US\$/troy oz)	4,245.90	4,245.9	N.A.
Nymex crude oil (US\$/bbl)	76.60	76.6	N.A.
Latex (RM/kg)	7.95	7.92	0.32%
Tin (US\$/mt)	52,974.0	53,343.0	-0.69%

Research Highlights

NEWS HIGHLIGHTS

- E&O partners Cengild Medical, Skyspring to build RM350m hospital at Andaman Island
- VS Industry flags challenging outlook after slipping into the red in 3Q
- Vestland secures RM65 mil piling works contract in Kuala Lumpur
- TWL Holdings buys 45% stake in property investment firm for RM42 mil
- Ocean Vantage to diversify into construction via related-party acquisition

MACRO BITS

- EU leaders weigh tougher measures to combat China trade imbalance
- Headline hits two-year high at 2.0%, but momentum is fading (See *Economic Viewpoint: Malaysia Consumer Price Index*)
- PM Anwar: Malaysia's new phase of economy based on high tech, semiconductors and AI
- PM Anwar: Malaysia's neutral and independent stance creates new economic opportunities
- DOSM: Malaysia's total trade rises 29.8% to MYR327.6b in May 2026
- Liew: MYR9.8b allocated to expand microfinancing for small traders
- BOJ may raise interest rates twice by March, says ex-BOJ policymaker
- US weekly jobless claims stay elevated amid seasonal volatility, but labor market stable
- Higher inflation drives jump in UK budget deficit in May

IDEAS OF THE DAY (SEE SEPARATE REPORTS FOR DETAILS)

- IC: KEEMING
- SU: Automotive
- Weekly Technical: DJIA, KLCI

#	Top Volume				Top Gainer				Top Loser			
	Stock	Price	%Chg (+/-)	Vol (m)	Stock	Price	%Chg (+/-)	Vol (m)	Stock	Price	%Chg (+/-)	Vol (m)
1	PBBANK	4.95	-1.0	52.10	PPB	10.12	8.8	2.43	PCHEM	4.49	-2.0	19.20
2	YTL	2.01	-1.5	29.30	IOICORP	4.33	2.1	5.03	MRDIY	1.65	-1.8	7.52
3	SUNMED	1.80	0.6	22.70	KLK	21.02	1.7	0.61	CIMB	7.65	-1.7	17.40
4	PCHEM	4.49	-2.0	19.20	TM	7.50	1.4	2.56	IOIPG	4.15	-1.7	5.34
5	PMETAL	8.53	0.1	18.40	NESTLE	96.22	1.1	0.13	YTL	2.01	-1.5	29.30
6	CIMB	7.65	-1.7	17.40	SUNMED	1.80	0.6	22.70	PBBANK	4.95	-1.0	52.10
7	TENAGA	14.50	0.4	15.90	PETDAG	18.74	0.5	1.27	CDB	2.79	-0.4	5.37
8	YTLPOWR	4.14	0.0	15.00	AXIATA	2.00	0.5	12.50	AMBANK	6.51	-0.2	5.60
9	AXIATA	2.00	0.5	12.50	GAMUDA	4.43	0.5	11.60	MISC	8.09	-0.1	3.02
10	RHBBANK	8.45	0.0	11.70	TENAGA	14.50	0.4	15.90	HLBANK	22.16	-0.1	3.25

Notes: # KL Composite Index (FBMKLCI) component stocks

Corporate News

- **E&O partners Cengild Medical, Skyspring to build RM350m hospital at Andaman Island**

KCB Holdings Sdn Bhd, a unit of Eastern & Oriental Bhd (KL:E&O), has teamed up with Cengild Medical Bhd (KL:CENGILD) and Skyspring Sdn Bhd to develop a RM350 million multidisciplinary tertiary private hospital at Andaman Island. Andaman Island is an artificial island off the coast of Penang, developed by E&O as part of its reclamation project. In a statement, E&O said the three parties signed a conditional joint venture agreement on Friday. Under the agreement, KCB will hold a 30% stake, while Cengild Medical will own 25% and Skyspring 45%. (*The Edge Malaysia*)

- **VS Industry flags challenging outlook after slipping into the red in 3Q**

VS Industry Bhd (KL:VS) said on Friday that its operating environment will remain challenging for the rest of the financial year, after slipping into the red in its latest results. The electronic manufacturing services provider posted a net loss of RM32.91 million for the third quarter ended April 30, 2026 (3QFY2026), compared with a net profit of RM23.77 million a year earlier, as revenue fell 11.6% to RM804 million from RM909.42 million. No dividend was declared for the quarter. (*The Edge Malaysia*)

- **Vestland secures RM65 mil piling works contract in Kuala Lumpur**

Vestland Bhd (KL:VLB) has secured a RM65 million contract to undertake piling and substructure works for a serviced apartment in Jalan Pavilion, Kuala Lumpur. Vestland reported a net profit of RM8.08 million for the first quarter ended March 31, 2026, up from RM7.81 million a year earlier. Revenue rose 26.73% to RM199.48 million from RM157.4 million. (*The Edge Malaysia*)

- **TWL Holdings buys 45% stake in property investment firm for RM42 mil**

TWL Holdings Bhd (KL:TWL) has acquired a 45% stake in a property investment company for RM42 million, as the group seeks new revenue opportunities and support for future projects. Shares in TWL closed unchanged at 2.5 sen on Friday, giving the group a market capitalisation of RM166.4 million. (*The Edge Malaysia*)

- **Ocean Vantage to diversify into construction via related-party acquisition**

The Ocean Vantage Holdings Bhd (KL:OVH), an oil and gas support services provider, is proposing to acquire a construction company for RM10 million as it seeks a new earnings stream amid declining revenue from its engineering, procurement and construction business. The proposed acquisition of Bina Gemilang Bersatu Sdn Bhd (BGB) is a related-party transaction, as Ocean Vantage managing director Kenny Ronald Ngalin owns 50% of BGB, according to a Bursa Malaysia filing on Friday. The remaining 50% stake is held by BGB director George Henry. (*The Edge Malaysia*)



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Macro Bits

Global

- [EU leaders weigh tougher measures to combat China trade imbalance](#) European Union leaders debated on Thursday new and tougher measures that could be needed to curb the bloc's growing trade deficit with China, and its heavy reliance on the world's second-largest economy for rare earths and other critical supplies. *(The Edge Malaysia)*

Malaysia

- **Headline hits two-year high at 2.0%, but momentum is fading** Headline inflation rose to 2.0% YoY in May (Apr: 1.9%), its highest level in two years. We maintain our 2026 inflation forecast at 2.1% (2025: 1.4%), as the US-Iran ceasefire only partially eases energy market disruptions. *(See Economic Viewpoint: Malaysia Consumer Price Index)*
- [PM Anwar: Malaysia's new phase of economy based on high tech, semiconductors and AI](#) Malaysia is entering a new phase of economy based on high technology, semiconductors, innovation and artificial intelligence (AI), said Prime Minister Datuk Seri Anwar Ibrahim. *(The Malaysian Reserve)*
- [PM Anwar: Malaysia's neutral and independent stance creates new economic opportunities](#) Malaysia's commitment to engaging all countries while maintaining its independence and neutrality has strengthened international confidence in the nation and created new opportunities for economic cooperation. *(The Malaysian Reserve)*
- [DOSM: Malaysia's total trade rises 29.8% to MYR327.6b in May 2026](#) Malaysia's total trade in May 2026 rose by 29.8 per cent year-on-year to MYR327.6b from MYR252.5b a year ago, driven by stronger growth in both exports and imports. *(The Malaysian Reserve)*
- [Liew: MYR9.8b allocated to expand microfinancing for small traders](#) The government has allocated MYR9.8b in financing funds through six major institutions to expand and simplify access to microcredit for hawkers and small entrepreneurs nationwide. *(The Edge Malaysia)*

Asia Pacific

- [BOJ may raise interest rates twice by March, says ex-BOJ policymaker](#) The Bank of Japan may raise interest rates twice by the end of the current fiscal year, after making a landmark shift in its policy focus toward mounting inflation risk, former board member Makoto Sakurai said. *(Reuters)*

Americas

- [US weekly jobless claims stay elevated amid seasonal volatility, but labor market stable](#) The number of Americans filing claims for unemployment benefits fell last week, but remained at slightly higher levels, suggesting some moderation in the pace of job growth in June. *(Reuters)*

Europe

- [Higher inflation drives jump in UK budget deficit in May](#) British government borrowing jumped much more sharply than expected in May as higher inflation pushed up the cost of servicing index-linked debt, in unwelcome news for the public finances. *(Reuters)*

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NAME*	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	LOW 30D
TANCO HOLDINGS BHD	0.140	8.01	5.31	6.35	0.120
CSC STEEL HOLDINGS BHD	1.240	16.79	10.06	1.17	1.220
MATRIX CONCEPTS HOLDINGS BHD	1.150	17.86	13.82	7.55	1.140
TMC LIFE SCIENCES BHD	0.435	20.02	14.89	5.87	0.430
FCW HOLDINGS BHD	1.600	24.10	10.34	0.00	1.600
PETRON MALAYSIA REFINING & M	3.760	24.38	20.20	13.69	3.690
D&O GREEN TECHNOLOGIES BHD	0.350	25.28	20.84	9.38	0.350
MEDIA PRIMA BHD	0.275	26.57	22.83	18.06	0.275
ENGTEX GROUP BHD	0.420	27.96	26.94	31.91	0.415
SKP RESOURCES BHD	0.280	28.70	24.03	7.96	0.275
SURIA CAPITAL HOLDINGS BHD	1.240	29.44	21.53	1.45	1.200

*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
MKH BHD	1.950	87.07	86.72	90.77	1.960
XL HOLDINGS BHD	0.795	86.66	92.76	99.70	0.800
TMK CHEMICAL BHD	2.540	84.81	87.97	94.78	2.570
PJBUMI BHD	3.900	82.17	86.72	96.75	3.900
DAGANG NEXCHANGE BHD	0.465	77.68	82.36	91.00	0.475
GIIB HOLDINGS BHD	0.465	77.25	69.64	17.31	0.490

*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
AIRASIA X BHD-HB	0.090	21.67	13.53	0.27	0.085	29/10/2026
ZETRIX AI BHD-BM	0.095	22.41	23.45	14.73	0.095	30/12/2026
HANG SENG INDEX-Q7	0.080	28.46	23.71	11.19	0.070	30/7/2026
PETRONAS CHEMICALS GROUP BHD-O	0.080	29.79	25.81	12.08	0.075	15/3/2027

Source: Bloomberg

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

NAME	LAST PRICE	RSI 14D	RSI 9D	RSI 3D	HIGH 30D	EXPIRY DATE
DAGANG NEXCHANGE BHD-C46	0.135	82.94	87.47	95.28	0.135	24/9/2026
DAGANG NEXCHANGE BHD-C47	0.095	82.35	86.55	95.11	0.095	27/10/2026
DAGANG NEXCHANGE BHD-C45	0.110	80.03	85.82	94.12	0.115	31/7/2026
DAGANG NEXCHANGE BHD-C50	0.100	78.03	84.12	92.12	0.105	29/1/2027
DAGANG NEXCHANGE BHD-C48	0.150	77.06	81.22	91.98	0.150	26/11/2026

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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