

Bulletin Today

BURSA MALAYSIA

Index	Closing	Pts Chg	% Chg
FBM-KLCI	1,608.75	6.67	0.42
Volume: Total (mil):	2,785.16	(540.47)	(16.25)
Total Value (RM' mil):	2,401.66	(128.10)	(5.06)
Gainers	611		
Losers	488		
Unchanged	478		

TRADE STATISTICS

Participation	Bought	Sold	Net
43.59 Institution	1,112	982	130
19.04 Retail	416	499	(83)
37.37 Foreign	874	921	(47)
100.00	2,402	2,402	0

FTSE-BURSA MALAYSIA

Index	Closing	Pts Chg	% Chg
FBM 70	18,572.21	177.16	0.96
FBM 100	12,037.28	69.24	0.58
FBM Palm Oil - NC	12,529.18	(23.20)	(0.18)
FBM Smallcap	17,711.89	73.53	0.42
FBM Emas	12,356.07	69.52	0.57
FBM Fledgling	19,579.83	(34.89)	(0.18)

WORLD

Index	Closing	Pts Chg	% Chg
Dow Jones	43,828	(86)	(0.20)
Nasdaq	19,927	24	0.12
FTSE 100	8,300	(11)	(0.14)
Nikkei 225	39,470	(379)	(0.95)
Hang Seng	19,971	(426)	(2.09)
Korea Kospi	2,494	12	0.50
Singapore STI	3,810	1	0.03
Thailand SET	1,432	(8)	(0.57)
Jakarta	7,325	(69)	(0.94)
Shanghai	3,392	(70)	(2.01)
Shenzhen	2,070	(42)	(2.01)

KLCI FUTURES

Index	Closing	Pts Chg	% Chg	Volume
FBM-KLCI	1,608.75	6.67	0.42	161m
FKLI - Dec 24	1,609.50	9.50	0.59	5,854
FKLI - Jan 25	1,613.00	8.50	0.53	1,185
FKLI - Mar 25	1,598.50	9.00	0.57	59
FKLI - Jun 25	1,604.50	10.50	0.66	23

FOREX & COMMODITIES

	Closing	Pts Chg	% Chg
CPO Futures (Mar)	4,816.00	(10.00)	(0.21)
Brent (USD/b)	74.49	1.08	1.47
Gold (USD/Ounce)	2,648.23	(32.50)	(1.21)
USD/RM	4.4495	0.0112	0.25
SGD/RM	3.2992	(0.0041)	(0.12)
JPY/RM	2.8967	(0.0101)	(0.35)

HIGHLIGHTS

- ◆ The Dow dipped 86.06 points or 0.2% to 43,828.06 while the Nasdaq inched up 23.88 points or 0.1% to 19,926.72
- ◆ Eurozone industrial production stagnates in October
- ◆ UK economy shrinks in October
- ◆ Japan industrial output grows less-than-estimated
- ◆ Exsim Hospitality bags renovation job worth RM21.0m
- ◆ Telekom Malaysia unveils GPU-as-a-Service, secures new international client
- ◆ T7 Global gets LOA from Petronas Carigali for pan-Malaysia services
- ◆ Lotte Chemical Titan shuts down operations temporarily in Pasir Gudang to cut losses
- ◆ Yinson's 3QFY25 net profit falls 19.4% Y-o-Y as revenue drops while finance costs climb

THE SLANT

- ◆ Local institutional support helped to shore up the key index to a positive close at the end of last week. In the process, the FBM KLCI also climbed back above the 200-day moving average line, albeit just marginally, to leave a mildly positive outlook. Overall trades, however, were relatively subdued with volumes slipping below 3.0b units even as there was firmer interest on the lower liner stocks that also helped market breadth to turn positive.
- ◆ Although the key index managed to recoup much of the previous week's losses, market conditions are still mostly indifferent. As it is, last Friday's gains could well have been window dressing activities as market sentiments remain largely insipid, devoid of significant leads and buying interest are likely to remain thin, particularly from foreign funds heading into the final weeks of the year. Market players could now be eyeing the upcoming Fed meeting for a widely expected interest rate cut to preserve the key index's mildly positive outlook into the start of 2025. Therefore, the mild window dressing activities may continue as the key index looks to end the year on firmer footing despite the continuing choppiness. On the upside, the key index could target the 1,612-1,615 levels before heading towards the 1,620 level. The supports, meanwhile, are at 1,605 and 1,600 levels respectively.
- ◆ The lower liners could also see further reprieve as their window dressing also look to continue over the near-term after an insipid 2H2024. Nevertheless, the upsides could still be modest due to the relatively low participation from retail players as many are already on their year-end break.

GLOBAL AND ECONOMIC UPDATE

- ◆ After failing to sustain an early move to the upside, stocks showed a lack of direction over the course of the trading session on Friday. The Dow dipped 86.06 points or 0.2% to 43,828.06 while the Nasdaq inched up 23.88 points or 0.1% to 19,926.72. [RTT News](#)
- ◆ **Eurozone industrial production stagnates in October**
Eurozone industrial production stagnated in October as growth in capital goods output was offset by falls in energy and consumer goods production. Industrial output remained flat in October after declining 1.5% M-o-M in September. The nil growth matched expectations. On a yearly basis, the decline in industrial production softened to 1.2% Y-o-Y from 2.2% Y-o-Y in September. Production was expected to fall 1.9% Y-o-Y. [RTT News](#)
- ◆ **UK economy shrinks in October**
UK economy contracted marginally for the second straight month in October largely reflecting the fall in industrial production. Real GDP shrank unexpectedly 0.1% M-o-M in October, the same pace of decline as in September. It was forecast to grow 0.1% M-o-M. On a yearly basis, GDP growth improved to 1.3% Y-o-Y from 1.0% Y-o-Y in September. Still, it was weaker than forecast of 1.6% Y-o-Y. [RTT News](#)
- ◆ **Japan industrial output grows less-than-estimated**
Industrial production in Japan increased less than initially estimated in October. It rose 2.8% M-o-M in October, faster than the 1.6% M-o-M rebound in September. The rate of growth was expected to grow 3.0% M-o-M. On a yearly basis, industrial production recovered 1.4% Y-o-Y from a 2.6% Y-o-Y fall a month ago. [RTT News](#)

CORPORATE NEWS

- ◆ **Exsim Hospitality bags renovation job worth RM21.0m**
Exsim Hospitality Bhd has secured a sub-contract worth RM21.0m for renovation works on 62 office units located on Old Klang Road. The sub-contract was awarded to its 100%-owned subsidiary, Exsim Concepto Sdn Bhd, by interior renovator firm Ntim Reno Sdn Bhd. The sub-contract is expected to be completed in three months. [The Edge Markets](#)
- ◆ **Telekom Malaysia unveils GPU-as-a-Service, secures new international client**
Telekom Malaysia has unveiled its GPU-as-a-Service (GPUaaS) — a cloud computing service model that provides access to high-performance graphics processing units (GPUs) over the internet where users can rent GPU resources on a pay-as-you-use basis — and announced it has secured an international client with its latest offering. The GPUaaS is the first-of-its-kind solution in Malaysia, and hosted entirely within the country. It eliminates the need for capital-intensive investments by providing scalable and on-demand access to cutting-edge resources. [The Edge Markets](#)

- ◆ **T7 Global gets LOA from Petronas Carigali for pan-Malaysia services**
T7 Global Bhd has received a letter of award (LOA) from Petronas Carigali Sdn Bhd for the provision of pan-Malaysia offshore maintenance, construction, modification (MCM), and hook-up commissioning (HUC) services. The contract, awarded to its 100%-owned Tanjung Offshore Services Sdn Bhd, was for Package C1 — Peninsular Malaysia Asset (PMA). However, the contract value was not disclosed. The contract, which commenced on 27 September, 2024, is for a period of five years, with an optional three-year plus two-year extension. [The Edge Markets](#)

- ◆ **Lotte Chemical Titan shuts down operations temporarily in Pasir Gudang to cut losses**
Lotte Chemical Titan Holdings Bhd has announced the temporary shutdown of one of its plants at the Pasir Gudang Complex in Johor, effective 15 December, 2024, to mitigate losses stemming from a prolonged downturn in the petrochemical industry. LC Titan will consider resuming the operation of the plant, named Naphtha Cracker Number 1 plant, when market conditions become more favourable. The plant has a nameplate capacity of 430,000 tonnes per annum. [The Edge Markets](#)

- ◆ **Yinson’s 3QFY25 net profit falls 19.4% Y-o-Y as revenue drops while finance costs climb**
Yinson Holdings Bhd’s net profit fell 19.4% Y-o-Y to RM200.0m in 3QFY25, from RM248.0m a year ago, as it recorded lower revenue and higher administrative expenses, as well as finance costs. Quarterly revenue fell 34.1% Y-o-Y to RM1.85b, from RM2.81b. Finance costs jumped by 81.6% Y-o-Y to RM444.0m, from RM199.0m a year ago. The group declared a third interim dividend of one sen per share. [The Edge Markets](#)

Table 1: Entitlements (16/12/2024 – 23/12/2024)

Stock Code	Stock Name	Entitlements	Description	Ex-Date	Lodgement Date	Payment/Cessation Date
8869	PRESS METAL ALUMINIUM HLDGS BHD	3rd Interim	0.0175	16/12/2024	17/12/2024	31/12/2024
6963	V.S. INDUSTRY BHD	1st Interim	0.004	16/12/2024	17/12/2024	31/12/2024
5302	AURELIUS TECHNOLOGIES BHD	2nd Interim	0.031	16/12/2024	17/12/2024	27/12/2024
0002	KOTRA INDUSTRIES BHD	Interim	0.125	16/12/2024	17/12/2024	26/12/2024
5576	MINHO M BHD	Interim	0.0085	16/12/2024	17/12/2024	30/12/2024
5258	BIMB HLDGS BHD	Interim	0.11	17/12/2024	18/12/2024	10/01/2025
5236	MATRIX CONCEPTS HLDGS BHD	2nd Interim	0.0275	17/12/2024	18/12/2024	09/01/2025
5248	BERMAZ AUTO BHD	Special Cash	0.07	17/12/2024	18/12/2024	30/12/2024
9296	RCE CAPITAL BHD	1st Interim	0.03	17/12/2024	18/12/2024	31/12/2024
7052	PADINI HLDGS BHD	Bonus Issue	1:2	17/12/2024	18/12/2024	19/12/2024
0303	ALPHA IVF GROUP BHD	1st Interim	0.005	17/12/2024	18/12/2024	31/12/2024
7087	MAGNI-TECH INDUSTRIES BHD	Special Cash	0.2	17/12/2024	18/12/2024	27/12/2024
7087	MAGNI-TECH INDUSTRIES BHD	2nd Interim	0.03	17/12/2024	18/12/2024	27/12/2024
3662	MALAYAN FLOUR MILLS BHD	2nd Interim	0.015	17/12/2024	18/12/2024	30/12/2024
0293	KJTS GROUP BHD	Interim	0.00291	17/12/2024	18/12/2024	30/12/2024
0299	AGX GROUP BHD	Interim	0.0045	17/12/2024	18/12/2024	30/12/2024
5208	EITA RESOURCES BHD	Interim	0.01	17/12/2024	18/12/2024	31/12/2024
6432	APOLLO FOOD HLDGS BHD	1st Interim	0.3	18/12/2024	19/12/2024	31/12/2024

5133	PETRA ENERGY BHD	Interim	0.04	18/12/2024	19/12/2024	17/01/2025
5159	YOONG ONN CORPORATION BHD	Final	0.04	18/12/2024	19/12/2024	17/01/2025
7235	SUPERLON HLDGS BHD	2nd Interim	0.0075	18/12/2024	19/12/2024	30/12/2024
7235	SUPERLON HLDGS BHD	Special Cash	0.0125	18/12/2024	19/12/2024	30/12/2024
5398	GAMUDA BHD	Bonus Issue	1:1	19/12/2024	20/12/2024	23/12/2024
5301	CTOS DIGITAL BHD	3rd Interim	0.0084	19/12/2024	20/12/2024	17/01/2025
3719	PANASONIC MANUFACTURING MALAYSIA BHD	Interim	0.15	19/12/2024	20/12/2024	20/01/2025
0249	LGMS BHD	2nd Interim	0.005	19/12/2024	20/12/2024	31/12/2024
0090	ELSOFT RESEARCH BHD	1st Interim	0.02	19/12/2024	20/12/2024	31/12/2024
7006	RHONG KHEN INTERNATIONAL BHD	1st Interim	0.03	19/12/2024	20/12/2024	31/12/2024
7006	RHONG KHEN INTERNATIONAL BHD	Final	0.03	19/12/2024	20/12/2024	31/12/2024
0228	HPP HLDGS BHD	1st Interim	0.005	19/12/2024	20/12/2024	30/12/2024
5168	HARTALEGA HLDGS BHD	Special Cash	0.1085	20/12/2024	23/12/2024	31/12/2024
6114	MKH BHD	1st Interim	0.04	20/12/2024	23/12/2024	10/01/2025
3743	SUNSURIA BHD	2nd Interim	0.01	20/12/2024	23/12/2024	31/12/2024
7088	POH HUAT RESOURCES HLDGS BHD	1st Interim	0.02	20/12/2024	23/12/2024	31/12/2024
5160	HOMERITZ CORPORATION BHD	Special Cash	0.039	20/12/2024	23/12/2024	31/12/2024
0058	JCBNEXT BHD	Interim	0.07	20/12/2024	23/12/2024	31/12/2024
0065	EXCEL FORCE MSC BHD	Final	0.005	20/12/2024	23/12/2024	07/01/2025
1171	MBSB BHD	Interim	0.0275	23/12/2024	24/12/2024	06/01/2025
5041	PBA HLDGS BHD	1st Interim	0.0225	23/12/2024	24/12/2024	10/01/2025
0245	MN HLDGS BHD	Interim	0.0015	23/12/2024	24/12/2024	22/01/2025

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