

BULLETIN TODAY

Thursday | 11 September 2025

BURSA MALAYSIA

Index	Closing	Pts Chg	% Chg
FBM-KLCI	1,590.75	3.94	0.25
Volume: Total (mil):	2,658.68	(353.86)	(11.75)
Total Value (RM' mil):	2,289.37	(318.94)	(12.23)
Gainers	518		
Losers	487		
Unchanged	508		

TRADE STATISTICS

Participation		Bought	Sold	Net
45.10	Institution	1,039	1,026	13
17.75	Retail	431	382	49
37.15	Foreign	820	881	(62)
100.00		2,289	2,289	0

FTSE-BURSA MALAYSIA

Index	Closing	Pts Chg	% Chg
FBM 70	16,423.33	(45.03)	(0.27)
FBM 100	11,551.46	13.98	0.12
FBM Palm Oil - NC	12,555.06	29.80	0.24
FBM Smallcap	15,943.83	6.79	0.04
FBM Emas	11,786.45	13.61	0.12
FBM Fledgling	16,911.94	36.36	0.22

WORLD

Index	Closing	Pts Chg	% Chg
Dow Jones	45,491	(220)	(0.48)
Nasdaq	21,886	7	0.03
FTSE 100	9,225	(17)	(0.19)
Nikkei 225	43,459	(185)	(0.42)
Hang Seng	26,200	262	1.01
Korea Kospi	3,315	54	1.67
Singapore STI	4,346	49	1.14
Thailand SET	1,278	2	0.15
Jakarta	7,699	70	0.92
Shanghai	3,812	5	0.13
Shenzhen	2,408	7	0.29

KLCI FUTURES

Index	Closing	Pts Chg	% Chg	Volume
FBM-KLCI	1,590.75	3.94	0.25	243m
FKLI - Sep 25	1,574.50	5.00	0.32	4,173
FKLI - Oct 25	1,571.50	5.50	0.35	369
FKLI - Dec 25	1,566.00	5.50	0.35	36
FKLI - Mar 26	1,546.00	2.50	0.16	7

FOREX & COMMODITIES

	Closing	Pts Chg	% Chg
CPO Futures (Dec)	4,446.00	(66.00)	(1.46)
Brent (USD/b)	67.49	1.10	1.66
Gold (USD/Ounce)	3,640.75	14.12	0.39
USD/RM	4.2203	0.0151	0.36
SGD/RM	3.2899	0.0049	0.15
JPY/RM	2.8618	0.0090	0.32

HIGHLIGHTS

- The Dow slide **220.42 points** or 0.5% to **45,490.92**, while the Nasdaq inched up **6.57 points** or 0.03% to **21,886.06**
- DOSM: Malaysia's jobless rate stays at decade-low in July 2025 at 3.0%
- U.S. producer prices unexpectedly edge down 0.1% M-o-M in August
- China falls back into deflation
- Pansar secures second highway job in Sarawak worth RM217.0m
- Furniture retailer **SSF Home** to invest another RM10.0m in venture capital fund
- Japanese conglomerate Yamae Group takes up 34% stake in **Texchem's** Sea Master Food
- UWC's 4QFY25 net profit surges on semiconductor market recovery

THE SLANT

- The FBM KLCI chalked up modest gains after hovering largely in the positive territory on Wednesday, supported by sustained buying interest in selected telco and utilities heavyweights. Likewise, the broader market also marched mildly higher. Meanwhile, overall trading activity softened, with volumes easing to 2.66b units from 3.01b units in the prior session, underscoring the lack of fresh domestic catalysts to drive participation.
- Stability in the domestic economy, as reflected by Malaysia unemployment rate holding steady at 3.0% in July 2025, coupled with the positive tone on Wall Street lent support to the FBM KLCI performance yesterday. However, upside momentum remained capped amid the absence of fresh domestic catalysts and the resurgence of net foreign selling. Key economic data releases in focus today include Malaysia's Industrial Production figures and the U.S. inflation data, with the latter serving as a crucial gauge for the Federal Reserve's interest rate trajectory. We maintain our view that the FBM KLCI will continue on a slight upward bias tone with the 1,600 psychological level acting as the key resistance, followed by 1,603 points. On the flipside, immediate support is pegged at 1,570 points, and thereafter at 1,560 points.
- Across the broader market, sentiment remains indifferent with subtle signs of profit-taking activities emerging among selected lower liners. Trading participation also tapered, suggesting investors are likely to remain selective until firmer leads materialise.

GLOBAL AND ECONOMIC UPDATE

- Stocks moved mostly higher early in the session on Wednesday but gave away ground over the course of the trading day. The Dow slide 220.42 points or 0.5% to 45,490.92, while the Nasdaq inched up 6.57 points or 0.03% to 21,886.06. [RTT News](#)
- **DOSM: Malaysia's jobless rate stays at decade-low**
Malaysia's jobless rate remained at decade-low level in July, as the number of employed persons rose amid an expanding labour force. Unemployment rate in July was 3.0%. Economists generally consider a 3.0% unemployment rate as the economy having full employment. The number of unemployed persons rose 0.6% M-o-M to 521.6k persons. [The Edge Markets](#)
- **U.S. producer prices unexpectedly edge down 0.1% M-o-M in August**
An unexpected modest decrease showed in the U.S. producer prices in August, largely reflecting a sharp pullback in prices for trade services. The producer price index for final demand edged down by 0.1% M-o-M in August after climbing by 0.7% M-o-M in July. The dip surprised economists, who had expected producer prices to rise by 0.3% M-o-M for the previous month. The annual rate of producer price growth slowed to 2.6% Y-o-Y in August from a downwardly revised 3.1% Y-o-Y in July. Economists had expected the annual rate of producer price growth to remain unchanged. [RTT News](#)
- **China falls back into deflation**
China's consumer prices declined more-than-expected in August on weaker demand and producer prices continued to fall, strengthening calls for more actions to bolster domestic consumption amid slowing exports growth. The consumer price index dropped 0.4% Y-o-Y from a year ago after remaining flat in July. Prices were expected to fall 0.2% Y-o-Y. [RTT News](#)

CORPORATE NEWS

- **Pansar secures second highway job in Sarawak worth RM217.0m**
Pansar Bhd has clinched another contract from the Sarawak Public Works Department (JKR Sarawak), this time valued at RM217.0m, for design and upgrading works under the Serian–Gedong–Samarahan dual carriageway highway project in the state. The job involves upgrading a 4km stretch of the existing JKR two-lane road between Simpang Gedong Isthmus and Simpang Lubok Teranggas into a four-lane dual carriageway. The 36-month contract, for Section 2 of Package 1 of the highway project, was awarded to its 100%-owned Perbena Emas Sdn Bhd. Work is scheduled to start this month. [The Edge Markets](#)
- **Furniture retailer SSF Home to invest another RM10.0m in venture capital fund**
SSF Home Group Bhd plans to make a fresh RM10.0m investment in a venture capital fund. The move enables SSF to earn returns from the subscription of limited partnership interest (LPI), which is expected to generate an income stream over a 12-month period. This latest investment raises its total commitment in the venture capital fund, Spartan Hybrid, to RM15.0m, after an earlier RM5.0m subscription in January. These investments were made by signing a subscription agreement for an LPI in Spartan Hybrid, which is managed by Spartan Ives Capital Sdn Bhd. The investments are funded entirely from internally generated funds. [The Edge Markets](#)

- **Japanese conglomerate Yamae Group takes up 34% stake in Texchem's Sea Master Food**

Texchem Resources Bhd is disposing of a 34% stake in its indirect 100%-owned Sea Master Food Sdn Bhd (SMF) to Japan's Yamae Global Co Ltd for RM14.9m, cash. Post-disposal, SMF will remain a sub-subsidiary of Texchem with a 66% equity interest, held via Wilpack Food Services Sdn Bhd. The move will allow SMF to tap into the technical know-how and expertise of the Yamae Group, a Japanese conglomerate engaged in the food business spanning fresh produce, processed food, confectionery and alcoholic beverages. Of the RM14.9m proceeds, Wilpack plans to distribute RM10.0m as a single-tier dividend to shareholders, use RM4.64m for loan repayments, and allocate RM300k for expenses and taxes related to the disposal. The proposed disposal is expected to be completed by 4Q2025. [The Edge Markets](#)

- **UWC's 4QFY25 net profit surges on semiconductor market recovery**

UWC Bhd has posted a near seven-fold rise in net profit for its 4QFY25, underpinned by a rebound in the semiconductor sector. Net profit for the 4QFY25 came in at RM16.5m, compared with RM2.4m in the previous year's corresponding quarter. Revenue for the quarter climbed 43.5% Y-o-Y to RM108.8m from RM75.8m, lifted by stronger demand from the semiconductor segment, which contributed RM235.4m to the revenue. [The Edge Markets](#)

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