

# BULLETIN TODAY

Friday | 12 September 2025

## BURSA MALAYSIA

Index	Closing	Pts Chg	% Chg
FBM-KLCI	1,582.85	(7.90)	(0.50)
Volume: Total (mil):	2,480.61	(178.07)	(6.70)
Total Value (RM' mil):	2,323.17	33.80	1.48
Gainers	461		
Losers	482		
Unchanged	556		

## TRADE STATISTICS

Participation	Bought	Sold	Net
45.56 Institution	1,027	1,090	(62)
17.20 Retail	377	422	(45)
37.24 Foreign	919	812	107
100.00	2,324	2,324	0

## FTSE-BURSA MALAYSIA

Index	Closing	Pts Chg	% Chg
FBM 70	16,468.74	45.41	0.28
FBM 100	11,515.80	(35.66)	(0.31)
FBM Palm Oil - NC	12,551.51	(3.55)	(0.03)
FBM Smallcap	15,989.61	45.78	0.29
FBM Emas	11,755.04	(31.41)	(0.27)
FBM Fledgling	16,849.67	(62.27)	(0.37)

## WORLD

Index	Closing	Pts Chg	% Chg
Dow Jones	46,108	617	1.36
Nasdaq	22,043	157	0.72
FTSE 100	9,298	72	0.78
Nikkei 225	43,838	378	0.87
Hang Seng	26,086	(114)	(0.43)
Korea Kospi	3,344	30	0.90
Singapore STI	4,356	9	0.22
Thailand SET	1,288	10	0.78
Jakarta	7,748	49	0.64
Shanghai	3,875	63	1.65
Shenzhen	2,469	61	2.54

## KLCI FUTURES

Index	Closing	Pts Chg	% Chg	Volume
FBM-KLCI	1,582.85	(7.90)	(0.50)	203m
FKLI - Sep 25	1,577.50	3.00	0.19	2,913
FKLI - Oct 25	1,574.00	2.50	0.16	110
FKLI - Dec 25	1,568.50	2.50	0.16	49
FKLI - Mar 26	1,546.00	0.00	0.00	27

## FOREX & COMMODITIES

	Closing	Pts Chg	% Chg
CPO Futures (Dec)	4,481.00	35.00	0.79
Brent (USD/b)	66.37	(1.12)	(1.66)
Gold (USD/Ounce)	3,634.07	(6.68)	(0.18)
USD/RM	4.2200	(0.0003)	(0.01)
SGD/RM	3.2859	(0.0040)	(0.12)
JPY/RM	2.8675	0.0057	0.20

## HIGHLIGHTS

- The **Dow surged 617.08 points** or 1.4% to **46,108.00** and the **Nasdaq advanced 157.01 points** or 0.7% to **22,043.07**
- DOSM: Malaysia's factory output grows faster-than-expected in July
- DOSM: Malaysia's July manufacturing sales up 3.5% Y-o-Y at RM162.5b
- U.S. consumer prices climb 0.4% M-o-M in August, slightly more-than-expected
- ECB holds rate steady as expected
- **Unique Fire** buys industrial land in Kota Kemuning for RM15.5m
- **Sealink's** vessel declared a total loss after Brazil fire
- **Gas Malaysia** to build two biogas purification plants, **Enproserve** gets one of two contracts
- Fire breaks out at **PT Resources'** coconut processing facility in China
- **Bermaz Auto** flags challenging outlook as 1QFY26 net profit skids to five-year low, declares 0.75 sen dividend
- **MyNews** sees new stores sustaining growth as 3QFY25 profit jumps

## THE SLANT

- The FBM KLCI retreated, snapping a three-day winning streak after several index heavyweights traded ex-dividend on Thursday. The broader market remained entrenched in a consolidation phase, with overall trading activity continuing to taper. Total volumes also declined to 2.48b units, from 2.66b units previously, highlighting the absence of fresh domestic catalysts to spur investor participation with market breadth on a mixed-to-lower note.
- The recent recovery appears to have lost momentum with the key index likely to have entered a consolidation phase as the market searches for fresh domestic leads. In the near term, sentiment is expected to remain cautious with external developments playing a more dominant role in setting the FBM KLCI's direction. Given the absence of strong domestic catalysts, investors should brace for a period of sideways consolidation and adopt a more selective approach. Despite the stickier U.S. inflation data, expectations of an imminent Fed rate cut may cushion downside risks, if any. Technically, the FBM KLCI's gap-down move yesterday reinforces the view of a consolidation phase, with the 1,600 psychological level serving as the immediate resistance, followed by 1,603 points. On the downside, support is located at 1,570 points, and subsequently at 1,560 points.
- As we approach the final trading day of the week ahead of the extended weekend break, we expect the broader market sentiment to stay largely indifferent. Trading activities may remain muted, with investors likely to adopt a wait-and-see stance until fresh catalysts emerge in the coming week.

## GLOBAL AND ECONOMIC UPDATE

- U.S. stocks showed a strong move to the upside during trading on Thursday, with the major averages all moving notably higher following the mixed performance seen during Wednesday's session. The Dow surged 617.08 points or 1.4% to 46,108.00 and the Nasdaq advanced 157.01 points or 0.7% to 22,043.07. [RTT News](#)
- **DOSM: Malaysia's factory output grows faster-than-expected in July**  
Malaysia's industrial output expanded faster-than-expected in July as manufacturing activities picked up and mining production rebounded. The industrial production index, which measures output from factories, power plants and mines, climbed 4.2% Y-o-Y. The print is significantly higher than the median 2.8% Y-o-Y increase predicted in a Bloomberg poll and June's revised 2.9% Y-o-Y gain. Growth of the key manufacturing sector accelerated to 4.4% Y-o-Y in July, from 2.9% Y-o-Y a month earlier. The index, however, shrank 0.3% M-o-M in July. [The Edge Markets](#)
- **DOSM: Malaysia's July manufacturing sales up 3.5% Y-o-Y at RM162.5b**  
Malaysia's manufacturing sector sales value rose 3.5% Y-o-Y to RM162.5b in July. The growth was mainly driven by the food, beverages and tobacco sub-sector, which expanded by 8.9% Y-o-Y in July, compared with 14.7% Y-o-Y in June. In the same period, sales value increased by 0.8% M-o-M, reaching RM162.5b, from RM161.2b recorded in the previous month. [The Edge Markets](#)
- **U.S. consumer prices climb 0.4% M-o-M in August, slightly more-than-expected**  
U.S. consumer prices rose by slightly more-than-expected in August. The consumer price index climbed by 0.4% M-o-M in August after inching up by 0.2% M-o-M in July. Economists had expected consumer prices to rise by 0.3% M-o-M. On a yearly basis, the rate of consumer price growth accelerated to 2.9% in August, from 2.7% in July, in line with economist estimates. [RTT News](#)
- **ECB holds rate steady as expected**  
The European Central Bank (ECB) left its key interest rate unchanged, as expected, and raised the euro area growth projection for this year while inflation forecasts were stable. The Governing Council held the deposit rate steady at 2.00%. [RTT News](#)

## CORPORATE NEWS

- **Unique Fire buys industrial land in Kota Kemuning for RM15.5m**  
**Unique Fire Holdings Bhd** is acquiring a land parcel measuring 4,926 sq. m. in Shah Alam for RM15.5m, to support its long-term expansion plans. Located within the Kota Kemuning industrial estate and in close proximity to the group's existing facilities, the land is expected to enhance operational efficiency and improve coordination of resources once developed. However, the group has not formalised specific development plans for the land. The land will be purchased from its current owner Teoh Han Chong and paid for using internally generated funds or bank borrowings. [The Edge Markets](#)
- **Sealink vessel declared a total loss after Brazil fire**  
One of **Sealink International Bhd's** offshore support vessels, which was damaged by fire in Brazil earlier in May, has been declared a constructive total loss. This was confirmed by the surveyor appointed by the vessel's insurer in a final claim settlement report. However, it did not disclose the financial implications to the group. [The Edge Markets](#)

▪ **Gas Malaysia to build two biogas purification plants, Enproserve gets one of two contracts**

**Gas Malaysia Bhd** is planning to build two biomethane purification plants in Perak. **Enproserve Group Bhd** has been awarded a contract to build one of the purification plants in Air Kuning while privately held MTC Orec Sdn Bhd will construct the other facility in Trong. Gas Malaysia did not disclose the project costs and Enproserve also did not disclose the value of the engineering, procurement, construction and commissioning contract. The plants are designed to remove impurities from raw biogas, turning it into cleaner biomethane. The planned plants, scheduled for completion within 13 months, follow the launch of Malaysia's first centralised station in the southern region earlier this year, which will see biomethane being injected into the natural gas grid. [The Edge Markets](#)

▪ **Fire breaks out at PT Resources' coconut processing facility in China**

A fire incident occurred at **PT Resources Holdings Bhd**'s coconut processing facility in Fuqing City, China on Monday. The fire incident did not cause any casualties or injuries to its staff. The facility is under its 100%-owned subsidiary Fujian HJS International Holdings Co Ltd. Fujian HJS is unable to assess if there is any damage to its processing facility and to determine the financial and operational impact due to the fire incident, amid the ongoing investigation into the cause of the fire incident. It will make further announcements on the actual losses incurred by Fujian HJS from the fire incident upon completion of the investigations and assessment by the authorities and the company. [The Edge Markets](#)

▪ **Bermaz Auto flags challenging outlook as 1QFY26 net profit skids to five-year low, declares 0.75 sen dividend**

**Bermaz Auto Bhd** reported an 88.2% Y-o-Y drop in 1QFY26 profit and warned of a tough year ahead with competition from low-priced Chinese cars. For 1QFY26, sales dropped as certain Mazda and Kia models near the end of their product life cycles, with competition from cheaper Chinese cars making it worse. Net profit for 1QFY26 skidded to RM8.3m, from RM70.2m a year ago — its lowest quarterly earnings since 4QFY20 — as quarterly revenue declined by 41.9% Y-o-Y to RM491.3m, from RM846.2m. The board declared a single tier first interim dividend of 0.75 sen per share, payable on 5 November, 2025. [The Edge Markets](#)

▪ **MyNews sees new stores sustaining growth as 3QFY25 profit jumps**

**MyNews Holdings Bhd** expects its continued expansion to drive sustained growth for the group as it reported a more than doubling of its 3QFY25 net profit from a year ago, due to stronger sales and the opening of new stores. Net profit for 3QFY25 surged to RM6.4m, from RM2.6m in 3QFY24, with quarterly revenue climbing 11.3% Y-o-Y to RM230.9m, from RM207.5m. The group declared an interim dividend of 0.5 sen per share. [The Edge Markets](#)

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