

BULLETIN TODAY

Wednesday | 17 September 2025

BURSA MALAYSIA

Index	Closing	Pts Chg	% Chg
FBM-KLCI	1,600.13	17.28	1.09
Volume: Total (mil):	2,225.66	(254.95)	(10.28)
Total Value (RM' mil):	2,096.37	(226.80)	(9.76)
Gainers	639		
Losers	394		
Unchanged	496		

TRADE STATISTICS

Participation	Bought	Sold	Net
42.72 Institution	819	973	(154)
20.04 Retail	382	458	(77)
37.24 Foreign	896	665	231
100.00	2,096	2,096	0

FTSE-BURSA MALAYSIA

Index	Closing	Pts Chg	% Chg
FBM 70	16,544.57	75.83	0.46
FBM 100	11,623.77	107.97	0.94
FBM Palm Oil - NC	12,579.81	28.30	0.23
FBM Smallcap	16,091.09	101.48	0.63
FBM Emas	11,862.72	107.68	0.92
FBM Fledgling	16,804.73	(44.94)	(0.27)

WORLD

Index	Closing	Pts Chg	% Chg
Dow Jones	45,758	(126)	(0.27)
Nasdaq	22,334	(15)	(0.07)
FTSE 100	9,196	(81)	(0.88)
Nikkei 225	44,768	396	0.89
Hang Seng	26,439	(8)	(0.03)
Korea Kospi	3,407	12	0.35
Singapore STI	4,338	(1)	(0.02)
Thailand SET	1,308	8	0.65
Jakarta	7,958	21	0.26
Shanghai	3,862	1	0.04
Shenzhen	2,490	18	0.74

KLCI FUTURES

Index	Closing	Pts Chg	% Chg	Volume
FBM-KLCI	1,600.13	17.28	1.09	206m
FKLI - Sep 25	1,588.50	11.00	0.70	3,515
FKLI - Oct 25	1,584.50	10.50	0.67	112
FKLI - Dec 25	1,579.50	11.00	0.70	129
FKLI - Mar 26	1,560.50	14.50	0.94	33

FOREX & COMMODITIES

	Closing	Pts Chg	% Chg
CPO Futures (Dec)	4,470.00	(11.00)	(0.25)
Brent (USD/b)	68.47	0.62	0.93
Gold (USD/Ounce)	3,689.98	9.07	0.25
USD/RM	4.2032	(0.0168)	(0.40)
SGD/RM	3.2895	(0.0093)	(0.28)
JPY/RM	2.8696	(0.0211)	(0.74)

HIGHLIGHTS

- The Dow dipped 125.55 points or 0.3% to 45,757.90 and the Nasdaq slipped 14.79 points or 0.1% to 22,333.96
- U.S. retail sales climb 0.6% M-o-M in August, much more-than-expected
- Eurozone industrial production recovers in July
- German economic sentiment rises in September
- UK jobless rate stable at 4.7%
- SunCon divests district cooling JV to Sunway's facilities arm in group realignment
- Ecoscience bags RM40.0m construction job for palm oils and fats refinery in Johor
- Maxim Global buys office tower on Jalan Klang Lama for RM29.5m
- PBA Holdings secures site for submarine pipelines with big cut in land premium
- Scientex tries to privatise Scientex Packaging again with RM1.50 per share capital reduction, repayment plan

THE SLANT

- The FBM KLCI closed the week on a firm note last Friday as the key index climbed marginally above the 1,600 psychological level to chalk up a 1.4% W-o-W gain. The broader market also turned more upbeat, as reflected by the positive market breadth with many lower liners ending the week on positive note. Total traded volumes, however, eased to 2.23b units, from 2.48b units as market participants turned to the sidelines ahead of the extended weekend break.
- Riding on firmer prospects of further U.S. rate cuts, the local bourse advanced in tandem with regional peers last Friday. Looking ahead, investors' focus will be directed towards the U.S. Federal Reserve's interest rate decision later tonight. With markets largely pricing in a 25 basis points cut, the move could provide a near-term boost to equities markets and help sustain the recovery momentum. A dovish policy signal could further reinforce risk appetite, setting the stage for more monetary easing and support an extended upward trajectory in the sessions ahead. Technically, the FBM KLCI staged a gap-up and charged towards the 1,600 psychological level, shifting the near-term tone to a more positive bias. For now, the 1,603 points will serve as the immediate hurdle, followed by 1,617 points as the next resistance level. On the flipside, support is located at 1,590 points, and subsequently at 1,580 points.
- Market sentiment has now turned more favourable among the broader market shares with the FBM ACE Index closing at the highest level since late-March 2025. This development is likely to sustain rotational plays as investors gradually return from the extended weekend break.

GLOBAL AND ECONOMIC UPDATE

- After ending the previous session mostly higher, U.S. stocks showed a lack of direction over the course of the trading day on Tuesday. The Dow dipped 125.55 points or 0.3% to 45,757.90 and the Nasdaq slipped 14.79 points or 0.1% to 22,333.96. [RTT News](#)
- **U.S. retail sales climb 0.6% M-o-M in August, much more-than-expected**
U.S retail sales rose by much more-than-expected in August. The retail sales climbed by 0.6% M-o-M in August, matching an upwardly revised increase in July. Economists had expected retail sales to inch up by 0.2% M-o-M. [RTT News](#)
- **Eurozone industrial production recovers in July**
Eurozone industrial production recovered at a moderate pace in July due to the rebound in consumer and capital goods output amid higher tariff threats. Industrial production registered a monthly growth of 0.3%, in contrast to the 0.6% decrease in June. However, the rate was slightly weaker than the forecast of 0.4% M-o-M. On a yearly basis, growth in industrial output more than doubled to 1.8% in July, from 0.7% in June. [RTT News](#)
- **German economic sentiment rises in September**
German economic confidence improved in September but financial market experts remained cautiously optimistic. The ZEW indicator of economic confidence rose unexpectedly to 37.3 in September, from 34.7 in the previous month. The score was expected to fall to 27.3. However, the assessment of current situation continued to deteriorate, falling more-than-expected to -76.4, from -68.6 in August. The reading was seen at -75.0. [RTT News](#)
- **UK jobless rate stable at 4.7%**
The UK jobless rate remained unchanged and average earnings growth slowed in the three months to July. The unemployment rate was at 4.7% in the three months to July, unchanged from the previous period. [RTT News](#)

CORPORATE NEWS

- **SunCon divests district cooling JV to Sunway's facilities arm in group realignment**
Sunway Construction Group Bhd (SunCon) is divesting its entire 40% stake in Engie-Sunway DCS Sdn Bhd to **Sunway Bhd's** facilities management arm, Sunway Property & Facility Management Sdn Bhd (SPFM), for RM11.0m cash. The move, which forms part of an intra-group restructuring exercise, will allow SunCon to streamline operations and sharpen its focus on core construction and related services. At the same time, Sunway's facilities arm will be able to strengthen its recurring income streams by integrating the district cooling system project into its portfolio. The proceeds from the proposed disposal will be utilised to fund SunCon's general working capital requirements. The disposal is expected to be completed by 4Q2025. [The Edge Markets](#)
- **Ecoscience bags RM40.0m construction job for palm oils and fats refinery in Johor**
Ecoscience International Bhd has secured a RM40.0m construction job for a palm oils and fats refinery plant in Johor. The contract was secured from an oil process engineering company. The identity of the client was not disclosed. The project is slated for completion by 1 July, 2026. [The Edge Markets](#)

- **Maxim Global buys office tower on Jalan Klang Lama for RM29.5m**
Maxim Global Bhd is buying a nine-storey office tower on Jalan Klang Lama here for RM29.5m to serve as its new office. It has entered into a sale and purchase agreement with Magna Tiara Development Sdn Bhd to acquire the building — called Southbank Block 6 — measuring 4,039 sq. m., at RM678.55 per sq. ft. The proposed acquisition is aimed at strengthening the group's image and branding by establishing a visible presence in a strategic location. The purchase will be funded through a combination of bank borrowings and internal funds. [The Edge Markets](#)
- **PBA Holdings secures site for submarine pipelines with big cut in land premium**
PBA Holdings Bhd has secured approval to acquire a 4.1-ac. site in George Town for RM20.0m, after the Penang state government agreed to cut the land premium by RM35.4m. The land on Macallum Street will be used for the construction of a pump house, the operations and maintenance of the third twin submarine pipelines, and future water infrastructure projects. The premium will be settled via internally generated funds, with completion targeted by December. The exercise is deemed a related party transaction as the Penang government, through the state secretary, holds a 55% stake in PBA. [The Edge Markets](#)
- **Scientex tries again to privatise Scientex Packaging with RM1.50 per share capital reduction, repayment plan**
Scientex Bhd, the main shareholder of **Scientex Packaging (Ayer Keroh) Bhd** (SciPack), has proposed a selective capital reduction and repayment plan. Under this plan, all SciPack shareholders except Scientex will get RM1.50 cash per share, totalling about RM147.8m. The shares of these shareholders will be cancelled, giving Scientex full ownership of SciPack. The company will also cancel 550,100 treasury shares after the exercise. This will make SciPack a 100%-owned subsidiary of Scientex, increasing its control over the business. The rationale for its latest privatisation attempt will enable the group to consolidate and streamline its packaging manufacturing operations under a single entity, allowing for more efficient resource allocation and management oversight. In addition, the exercise offers minority shareholders an opportunity to realise their investment in SciPack at a premium over the prevailing market price, without being exposed to the inherent risks of the industry and market fluctuations. The selective capital reduction will be funded through internally generated funds and/or external borrowings. [The Edge Markets](#)

Table 1: Entitlements (15/09/2025 – 22/09/2025)

Stock Code	Stock Name	Entitlements	Description	Ex-Date	Lodgement Date	Payment/Cessation Date
4863	TELEKOM MALAYSIA BHD	Interim	0.125	17/09/2025	18/09/2025	30/09/2025
0166	INARI AMERTRON BHD	4th Interim	0.012	17/09/2025	18/09/2025	10/10/2025
2291	GENTING PLANTATIONS BHD	Interim	0.1	17/09/2025	18/09/2025	03/10/2025
5983	MBM RESOURCES BHD	1st Interim	0.07	17/09/2025	18/09/2025	29/09/2025
5983	MBM RESOURCES BHD	Special Cash	0.15	17/09/2025	18/09/2025	29/09/2025
6262	INNOPRISE PLANTATIONS BHD	2nd Interim	0.025	17/09/2025	18/09/2025	26/09/2025
5024	HUP SENG INDUSTRIES BHD	1st Interim	0.02	17/09/2025	18/09/2025	06/10/2025
7237	POWER ROOT BHD	1st Interim	0.015	17/09/2025	18/09/2025	06/10/2025
7167	ABLE GLOBAL BHD	2nd Interim	0.02	17/09/2025	18/09/2025	30/09/2025
0172	OCK GROUP BHD	Interim	0.003	17/09/2025	18/09/2025	02/10/2025
7216	KAWAN FOOD BHD	Interim	0.01	17/09/2025	18/09/2025	08/10/2025
7115	SKB SHUTTERS CORPORATION BHD	2nd Interim	0.025	17/09/2025	18/09/2025	17/10/2025
7232	RESINTECH BHD	Final	0.0125	17/09/2025	18/09/2025	30/09/2025

Stock Code	Stock Name	Entitlements	Description	Ex-Date	Lodgement Date	Payment/Cessation Date
7176	TPC PLUS BHD	1st Interim	0.005	17/09/2025	18/09/2025	02/10/2025
6068	PCCS GROUP BHD	Interim	0.01	17/09/2025	18/09/2025	06/10/2025
1023	CIMB GROUP HOLDINGS BHD	1st Interim	0.1975	18/09/2025	19/09/2025	30/09/2025
5005	UNISEM (M) BHD	2nd Interim	0.02	18/09/2025	19/09/2025	03/10/2025
5053	O.S.K. HOLDINGS BHD	Interim	0.025	18/09/2025	19/09/2025	16/10/2025
5236	MATRIX CONCEPTS HOLDINGS BHD	1st Interim	0.0175	18/09/2025	19/09/2025	09/10/2025
4383	JAYA TIASA HOLDINGS BHD	2nd Interim	0.035	18/09/2025	19/09/2025	03/10/2025
5308	SENG FONG HOLDINGS BHD	4th Interim	0.0025	18/09/2025	19/09/2025	16/10/2025
2828	C.I. HOLDINGS BHD	Final	0.2	18/09/2025	19/09/2025	30/09/2025
6874	KUB MALAYSIA BHD	1st & Final	0.04	18/09/2025	19/09/2025	30/09/2025
0243	CENGILD MEDICAL BHD	Interim	0.0037	18/09/2025	19/09/2025	07/10/2025
2542	RIVERVIEW RUBBER ESTATES BHD	Interim	0.05	18/09/2025	19/09/2025	03/10/2025
0201	NOVA WELLNESS GROUP BHD	Interim	0.016	18/09/2025	19/09/2025	29/09/2025
7077	KERJAYA PROSPEK PROPERTY BHD	Rights Issue	3:4	18/09/2025	19/09/2025	-
7077	KERJAYA PROSPEK PROPERTY BHD	Rights Issue	1:2	18/09/2025	19/09/2025	-
5878	KPJ HEALTHCARE BHD	Interim	0.0105	19/09/2025	22/09/2025	10/10/2025
6459	MNRB HOLDINGS BHD	Special Cash	0.05	19/09/2025	22/09/2025	06/10/2025
6459	MNRB HOLDINGS BHD	Final	0.05	19/09/2025	22/09/2025	06/10/2025
7087	MAGNI-TECH INDUSTRIES BHD	Interim	0.035	19/09/2025	22/09/2025	15/10/2025
5142	WASCO BHD	1st Interim	0.03	19/09/2025	22/09/2025	08/10/2025
5300	YENHER HOLDINGS BHD	Interim	0.015	19/09/2025	22/09/2025	10/10/2025
0237	HAILY GROUP BHD	1st Interim	0.0035	19/09/2025	22/09/2025	17/10/2025
0192	INTA BINA GROUP BHD	1st Interim	0.01	22/09/2025	23/09/2025	03/10/2025

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