

Trade Performance

- Total market capitalisation as at 30 November 2021 moderated by 2.9% month-on-month to RM1,764 billion as investors reacted negatively to the prosperity tax and review of stamp duty tabled in the Budget 2022. Market sentiment was further dampened with the discovery of Omicron variant which raised fear for the global economy.
- In November, ADV slightly moderated to RM2.81 billion (October: RM2.93 billion).
- All segments recorded lower ADV, except for foreign institution with a 26.7% increase to RM778 million as compared to the previous month. ADV of local retail investors decreased by 13.7% month-on-month.
- Foreign investors recorded net buy of RM167 million in November.

Fund Flow

Figure 1: Top 3 Net Fund Flow by Sector, November 2021

Foreign		Local Institutional*		Local Retail*	
Net Buy	Net Sell	Net Buy	Net Sell	Net Buy	Net Sell
Technology +RM688 mil	Consumer (RM238 mil)	Plantation +RM89 mil	Financial Services (RM929 mil)	Financial Services +RM561 mil	Technology (RM210 mil)
Industrial +RM183 mil	Plantation (RM123 mil)	Energy +RM79 mil	Technology (RM383 mil)	Industrial +RM207 mil	Energy (RM19 mil)
Telco & Media +RM11 mil	Utilities (RM112 mil)	Consumer +RM57 mil	Industrial (RM283 mil)	Utilities +RM188 mil	Property (RM6 mil)

Notes:

- Based on market transaction only;
- *Numbers exclude IVT, PDT and nominees

- Foreign investors were net sell on Consumer Products and Services, and Plantation sectors but were supported by net buy by local institutional investors.
- Net sell of Technology Sector by local institutional and local retail investors were supported by foreign net buy.
- Foreign outflow in the Utilities sector was supported by local retail net buy.
- Local institutional recorded net sell on Industrial Products and Services and was supported by local retail and foreign net buy.
- Net sell of financial services by local institutional investor was supported by local retail net buy.
- Foreign net buy on telecommunications & media sector mainly led by AXIATA

Figure 2: Top 5 Stocks Net Fund Flow by Investor Category (RM Mil), November 2021

Foreign			Local Institutional*				Local Retail*			
Net Buy		Net Sell	Net Buy		Net Sell		Net Buy		Net Sell	
INARI	+480	PBBANK (312)	KLK	66	MAYBANK	(507)	MAYBANK	216	GENETEC	(65)
CIMB	+342	GENTING (114)	ARMADA	50	INARI	(396)	PBBANK	201	AIRASIA	(54)
MAYBANK	+183	TENAGA (108)	MISC	45	CIMB	(306)	TENAGA	161	INARI	(33)
HONGSENG	+132	SUPERMX (106)	D&O	42	TENAGA	(157)	BURSA	125	HLCAP	(25)
PCHEM	+124	KOSSAN (87)	HLBANK	41	ATAIMS	(132)	ATAIMS	83	ABMB	(22)

Notes:

- Based on market transaction only;
- *Numbers exclude IVT, PDT and nominees

- **INARI** was sold by local institutional (-RM396 million) and local retail (-RM33 million) and bought by foreign investors (+RM480 million). **Foreign net buy on INARI for 12 consecutive weeks since the week of 12 September.**
- **CIMB** was sold by local institutional (-RM306 million) and bought by foreign investors (+RM342 million)
- **MAYBANK** was sold by local institutional (-RM507 million) and bought by local retail (+RM216 million) and foreign investors (+RM183 million)
- **PBBANK** was sold by foreign investors (-RM312 million) and bought by local retail (+RM201 million). **Local retail net buy on PBBANK for six consecutive weeks since the week of 24 October. Local institutional net buy on PBBANK for the past three consecutive weeks since the week of 14 November.**
- **TENAGA** was sold by foreign investors (-RM108 million) and local institutional (-RM157 million) and bought by local retail (+RM161 million). **Local retail net buy on TENAGA for 13 consecutive weeks since the week of 5 September while foreign net sell for six consecutive weeks since the week of 24 October.**
- **ATAIMS** was sold by local institutional (-RM132 million) and bought by local retail (+RM83 million).
- **Local retail continued to rotate their funds to dividend stocks as they bargain hunt for blue chips. MAYBANK, PBBANK, TENAGA and BURSA led in terms of retail net buy in November.**

DISCLAIMER: This report is provided for general information purposes only. Although care has been taken to ensure the accuracy of the information within this report, Bursa Malaysia Berhad and its subsidiaries ("Bursa Malaysia Group") do not warrant or represent, expressly or impliedly as to the completeness, accuracy or currency of the information in this report. Bursa Malaysia Group does not endorse and shall not be liable for any information in this report that have been obtained via third party sources (if any).

The information contained in this report is neither an offer or solicitation to enter into any transaction nor is it a recommendation or endorsement of any product(s) mentioned in this report. The information also does not constitute legal, financial, trading or investment advice. You are advised to seek independent advice and/or consult relevant laws, regulations and rules prior to trading/investing. Bursa Malaysia Group does not accept any liability howsoever arising, including any liability arising from any trading/investment decisions made on the basis of this information.

This report or any part of this report shall not be used or reproduced in any form without Bursa Malaysia Berhad's prior written permission.