

Trade Performance

- Total market cap as at 28 Feb 22 climbed by 4.4% MoM to RM1,806 bil due to buying in the energy and plantation sectors as crude oil price topped US\$100 per barrel while crude palm oil breached RM7,000 per tonne for the first time.
- In Feb 22, total ADV jumped by 36.8% MoM to RM2.77 bil, with growth recorded across all investor segments.
- Foreign investors accelerated the buying with an inflow of +RM2,843 mil compared with +RM332 mil in January.

Fund Flow by Sector

Figure 1: Top Three Net Fund Flow by Sector, Feb 22

Foreign		Local Institution*		Local Retail*	
Net Buy	Net Sell	Net Buy	Net Sell	Net Buy	Net Sell
Financial Services +RM1,225 mil	Healthcare (RM91 mil)	Property +RM70 mil	Industrial (RM842 mil)	Healthcare +RM199 mil	Financial Services (RM402.3 mil)
Industrial +RM781 mil	Technology (RM57 mil)	-	Financial Services (RM570 mil)	Utilities +RM161 mil	Plantation (RM109 mil)
Plantation +RM624 mil	Property (RM32 mil)	-	Plantation (RM557 mil)	Technology +RM129 mil	Transportation (RM6 mil)

Notes:

- Based on market transaction only;
- *Numbers exclude IVT, PDT and nominees
- Local Institution net sold across most sectors in Feb 2022

FINANCIAL SERVICES

- Foreign inflow continued for the second month in anticipation of the country's economic recovery and OPR hike. In Feb, foreign inflow into Financial Services strengthened further to +RM1,225 mil compared to +RM463 mil in Jan.
- Contrarily, local institutions net sold -RM570 mil while local retailers disposed of -RM402.3 mil.
- Foreign investors contributed to the inflow of more than RM300 mil a week for three consecutive weeks from the week ended 11 Feb to 25 Feb. They bought the most at +RM374 mil for the week ended 25 Feb, just ahead of BNM's decision on OPR rate on 2 March.

INDUSTRIAL

- Foreign investors significantly increased their position (+RM781 mil) in Feb versus Jan (+RM305 mil). This is the eighth consecutive months with foreign inflow since July 21.
- On the other hand, local institutions intensified their outflow (-RM842 mil) compared to Jan (-RM357 mil).

PLANTATION

- Foreign investors turned net buyers in Feb, having bought +RM624 mil worth of plantation stocks as CPO price minted a new high in the month.
- Meanwhile, local institutions sold -RM557 mil worth of plantation stocks while local retailers offloaded -RM109 mil.

CONSUMER

- Foreigner investors became net buyers in Feb with an inflow of +RM196 mil. This follows three consecutive months of net sell since Nov 21.
- On the other hand, local retailers continued to be net sellers for the second month since Jan, after their net purchase from Oct to Dec 21.

TECHNOLOGY

- Foreign investors continued to sell technology stocks in Feb, leading to an outflow of -RM57 mil compared to -RM120 mil in Jan. They were net buyers from Jul to Dec 21.

TRANSPORTATION

- The sector received foreign inflow of +RM25 mil following the outflow since Nov 21.
- Local retailers and institutions turned net sellers in Feb after increasing their position since Oct 21 and Nov 21 respectively.

UTILITIES

- The sector continued to be favoured by local retailers as they increased their position for the sixth consecutive month. Meanwhile, foreign inflow stood at +RM88 mil.
- Local institutional outflow intensified (-RM302 mil) as compared to the previous month (-RM203 mil). This marks the seventh consecutive months of selling by local institutions.

HEALTHCARE

- Local retailers increased their buying of healthcare stocks to +RM199 mil compared to +RM61mil in Jan. They have been net buyers since May 21.
- Foreign outflow totalled at -RM91 mil versus -RM77 mil in Jan.

Fund Flow by Stocks

Figure 2: Top Five Stocks Net Fund Flow by Investor Category (RM Mil), Feb 22

Foreign				Local Institution*				Local Retail*			
Net Buy		Net Sell		Net Buy		Net Sell		Net Buy		Net Sell	
PMETAL [s]	+605	HARTA [s]	(57)	DNEX [s]	+80	PMETAL [s]	(520)	TENAGA [s]	+129	MAYBANK	(158)
MAYBANK	+517	MYEG [s]	(53)	GENP [s]	+51	KLK [s]	(274)	HARTA [s]	+82	PMETAL [s]	(69)
PBBANK	+337	PENTA [s]	(46)	IHH [s]	+43	MAYBANK	(219)	UTDPLT [s]	+48	DNEX [s]	(62)
KLK [s]	+273	IHH [s]	(46)	HEIM	+40	PCHEM [s]	(199)	SUPERMX [s]	+45	CIMB	(58)
CIMB	+250	SUPERMX [s]	(45)	SENHENG [s]	+31	CIMB	(175)	INARI [s]	+42	HLCAP	(40)

Notes:

- Based on market transaction only;
- *Numbers exclude IVT, PDT and nominees
- [s] indicates Shariah compliance

PMETAL

Foreign inflow to the stock increased strongly at +RM605 mil from +RM210 mil in Jan, marking the third consecutive month of net buy. On the flip side, local institutions net sold -RM520 mil in Feb compared to -RM142 mil in Jan.

MAYBANK

Foreign investors continued to buy Maybank at +RM517 mil, a further increase from +RM68 mil in Jan. They have been buying since Oct 21. This supports the outflow from local institutions (-RM219 mil) and local retailers (-RM158 mil).

PBBANK

Foreign added their stake with an inflow of +RM337 mil versus +RM220 mil in Jan. This offsets the selling by local retailers (-RM165 mil) and local institutions (-RM12 mil).

KLK

Foreign investors continued buying with an inflow of +RM273 mil as local institutions sold -RM274 mil. Foreign investors bought +RM16 mil in Jan after recording three months of outflow prior.

CIMB

This marks the ninth consecutive month of foreign inflow, which accelerated to +RM250 mil compared with +RM127 mil in Jan and +RM104 mil in Dec 21. Conversely, local institutions sold -RM175 mil while local retailers unloaded -RM58 mil.

PCHEM

Foreign inflow of +RM193 mil supporting the net outflow from local institutions of -RM199 mil.

IHH

Selling by foreign investors softened to -RM46 mil compared to -RM74 mil in Jan. Meanwhile, local institutions net bought +RM43 mil.

DNEX

Local institutions bought +RM80 mil worth of the stock after a heavy inflow of +RM246 mil in Jan. This is offset by the net sold position of retail investors at -RM62 mil.

HARTA

Local retailers were net buyers at +RM82 mil, which offset the outflow of -RM57 mil by foreign investors.

SUPERMX

Foreign investors continued to sell for the fourth month, but outflow narrowed further to -RM45 mil from -RM50 mil in Jan. Local retailers net bought +RM45 mil and have increased their stake since May 21.

INARI

Heavy outflow from local institutions (-RM132 mil) was supported by local retailers' net purchase (+RM42 mil) and foreign inflow (+RM51 mil).

TENAGA

Local retailers continue to buy +RM129 mil in Feb versus +RM132 mil in Jan. Local retailers have been net buyers since Sept 21. Foreign investors net bought +RM6 mil. Local institutions reduced their stake at a slower pace (-RM170 mil).

HEIM

Local institutions purchased +RM40 mil, which offset the outflow by foreign investors of -RM42 mil.

SENHENG

Local institutions were bargain hunting with a net purchase of +RM31 mil while foreign investors purchased +RM1 mil. This supported the -RM25 mil net selling by local retail investors. The consumer electrical and electronics retailer was listed on 25 Jan.

PENTA

Local institutions reversed the selling to become net buyers at +RM29 mil. They were net sellers in Jan at -RM91 mil. Retailers continued to buy +RM20 mil in Feb compared to +RM25 mil in Jan. This offset the foreign outflow of -RM46 mil from an inflow of +RM5 mil in Jan.

MYEG

Foreigners were net sellers for the second consecutive month as they disposed of -RM53 mil in Feb (-RM46 mil in Jan). This was supported by the buying interest from local retailers, who bought +RM19 mil, albeit at a slower pace compared to +RM24 mil a month ago. Local institutions turned net sellers with an outflow of -RM25 mil versus an inflow of +RM36 mil in Jan.

Definition

The following terms bear the same meanings as set out below unless defined otherwise.

ADV	: Average Daily Traded Value
Apr	: April
Bil	: Billion
BNM	: Bank Negara Malaysia
Dec	: December
Feb	: February
IVT	: Proprietary Trading Investment Traders
Jan	: January
Market Cap	: Market Capitalisation
Mil	: Million
MoM	: Month-on-Month
MPC	: Monetary Policy Committee
Nov	: November
Oct	: October
OPR	: Overnight Policy Rate

PDT : Proprietary Day Traders

Sept : September

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