

Trade Performance

- Total market cap as at end of April 22 escalated by 1.7% MoM to RM1,826 bil, as the plantation sector gained following the CPO export ban from neighbouring country.
- In April, total ADV moderated to RM2.14 bil (March: RM2.96 bil), dragged by weaker trading activities among local institutional investors.
- Foreign inflow tapered to +RM825 mil in April as compared to +RM3,288 mil in March.

Fund Flow by Sector

Figure 1: Top Three Net Fund Flow by Sector (RM Mil), April 22

Foreign		Local Institution*		Local Retail*	
Net Buy	Net Sell	Net Buy	Net Sell	Net Buy	Net Sell
Financial Services +688	Health Care (131)	Energy +78	Financial Services (679)	Technology +157	Plantation (101)
Plantation +246	Technology (107)	Construction +68	Industrial (336)	Health Care +65	Financial Services (37)
Industrial +240	Telco & Media (94)	Health Care +54	Technology (111)	Utilities +63	Energy (14)

Notes:

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

FINANCIAL SERVICES

- Foreign inflow continued for the fourth month in anticipation of the country's economic recovery. In April, net purchase by foreign investor eased to +RM688 mil as opposed to +RM1,227 mil in the previous month.
- Outflow from local institution narrowed to -RM679 mil in April as compared to -RM1,020 mil a month earlier. Local retailer net sold -RM37 mil (March: -RM170 mil).

PLANTATION

- Foreign investor further increased its stake in plantation stocks with +RM246 mil (March: +RM962 mil) in respond to the CPO export ban from Indonesia.
- Meanwhile, local retailer offloaded -RM101 mil in April.

INDUSTRIAL

- Foreign investor further strengthened its position with +RM240 mil in April versus March (+RM1,056 mil). This is the tenth consecutive month with foreign inflow since July 21.
- On the other hand, outflow from local institution narrowed to -RM336 mil as compared to March (-RM1,295 mil).

HEALTH CARE

- Foreign investor disposed of -RM131 mil worth of health care stocks in April but was supported by local institution (+RM54 mil) and local retailer (+RM65 mil).

TECHNOLOGY

- Foreign outflow moderated to -RM107 mil in April as compared to March (-RM167 mil) while local institution offloaded -RM111 mil. Local retailer added +RM157 mil in April.

ENERGY

- Local institution added +RM78 mil to its portfolio while local retailer offloaded -RM14 mil.
- Foreign investor turned net seller with an outflow of -RM14 mil.

CONSTRUCTION

- Local institution net purchased for the second consecutive month at +RM68 mil (March: +RM67 mil) amid anticipation of revival of more large-scale infrastructure projects.
- Meanwhile, foreign investor turned net seller with an outflow of -RM15 mil.

UTILITIES

- Foreign investor continued to reduce its position albeit at a slower pace of -RM19 mil (March: -RM71 mil) while local institution offloaded -RM80 mil.
- Local retailer net purchased for the eighth consecutive months. In April, local retailer added +RM63 mil to its portfolio.

Fund Flow by Stocks

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

Foreign				Local Institution*				Local Retail*			
Net Buy		Net Sell		Net Buy		Net Sell		Net Buy		Net Sell	
PBBANK	+328	TOPGLOV [s]	(63)	HIBISCS [s]	+55	PBBANK	(288)	TENAGA [s]	+55	PBBANK	(43)
MAYBANK	+210	INARI [s]	(52)	KLK [s]	+54	MAYBANK	(216)	GENTING	+40	TAANN [s]	(38)
PCHEM [s]	+182	KLK [s]	(38)	IJM [s]	+42	PCHEM [s]	(172)	TOPGLOV [s]	+37	RUBEREX	(34)
SIMEPLT [s]	+161	DNEX [s]	(35)	DSONIC [s]	+40	SIMEPLT [s]	(160)	INARI [s]	+28	DSONIC [s]	(28)
RHBBANK	+109	TENAGA [s]	(30)	KOSSAN [s]	+36	RHBBANK	(128)	REVENUE [s]	+26	HIBISCS [s]	(28)

Notes:

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

PBBANK

The counter continued to be favoured by foreign investor with an added capital of +RM328 mil, offsetting the selling by local institution (-RM288 mil) and local retailer (-RM43 mil). This was also the fourth consecutive month with foreign capital inflow to the counter.

MAYBANK

Foreign inflow to MAYBANK narrowed to +RM210 mil versus March's +RM348 mil. Foreign investor has been buying since Oct 21. On the other hand, outflow was seen from local institution (-RM216 mil) and local retailer (-RM1 mil).

PCHEM

Foreign inflow normalised to +RM182 mil after a significant jump of +RM1,098 mil in March. Foreign investor has been net buyer since March 21.

SIMEPLT

Foreign capital inflow intensified to +RM161 mil in April as opposed to +RM80 mil a month earlier. This was also the third consecutive month where foreign investor net purchased the counter.

RHBBANK

Foreign investor turned net buyer with +RM109 mil in April, after net selling for the past five months.

TOPGLOV

Foreign investor net disposed of -RM63 mil in April after increasing its position for the past two months. Meanwhile, local institution turned net buyer after selling for the past three months. Local retailer added +RM37 mil to its portfolio.

INARI

Foreign investor reduced its position for the second month, with its outflow slowed to -RM52 mil (March: -RM132 mil). Local retailer added +RM28 mil to its portfolio.

KLK

Foreign investor turned net seller in April by net disposing -RM38 mil of KLK stocks. On the other hand, local institution turned net buyer and added +RM54 mil to its portfolio.

DNEX

Local institution reversed to net buyer after added +RM24 mil to its portfolio. Meanwhile, foreign investor turned net seller with an outflow of -RM35 mil.

TENAGA

Local retailer net purchased since Sept 21. The momentum remained largely the same in April at +RM55 mil (March: +RM50 mil). Both foreign investor and local institution were net seller in the same month.

HIBISCS

Foreign investor was a net buyer since Jan 22 while local institution net purchased for the past two months. In April, foreign investor added +RM16 mil while local institution increased its momentum to +RM55 mil (March: +RM35 mil). Local retailer has been a net seller since Sept 21.

IJM

Local institution increased its position since Feb 22. In April, the momentum swelled to +RM42 mil versus March's +RM13 mil. IJM's share price climbed 29.6%, from RM1.42 at the closing of 31 Jan to RM1.84 at the closing of 29 Apr.

DSONIC

Local institution significantly increased its position, having added +RM40 mil in April (March: +RM1 mil). The counter closed 18.9% higher MoM at RM0.565 on 29 Apr.

KOSSAN

Local institution turned net buyer in April and added +RM36 mil, offsetting -RM27 mil of foreign outflow.

GENTING

Local retailer further added +RM40 mil in April (March: +RM74 mil). Meanwhile, local institution increased its selling momentum with an outflow of -RM35 mil while foreign investor continued to reduce its stake (-RM24 mil in March and -RM18 mil in April).

REVENUE

Local retailer added +RM26 mil of REVENUE stock to its portfolio, most significant during the week ended 29 Apr ahead of the BNM's announcement on digital bank licences winners. Local institution offloaded -RM27 mil in the same month.

TAANN

Foreign inflow narrowed to +RM24 mil (March: +RM40 mil) while local institutional purchase slowed to +RM27 mil. Local retailer's outflow also narrowed to -RM38 mil (March: -RM59 mil).

RUBEREX

Local retailer disposed of -RM34 mil but was supported by local nominee. Momentum from foreign and local institution remained muted.

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
CPO	: Crude Palm Oil
Feb	: February
Industrial	: Industrial Products & Services
IVT	: Proprietary Trading Investment Traders
Jan	: January
Market Cap	: Market Capitalisation
Mil	: Million
MoM	: Month-on-Month
Oct	: October
PDT	: Proprietary Day Traders
Sept	: September
Telco & Media	: Telecommunications and Media

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