

TRADE PERFORMANCE AND FUND FLOW

13 September 2022



Trade Performance

- The market capitalisation of Bursa Malaysia grew 0.8% M-o-M to RM1,706 bil as at end-August (July: RM1,693 bil) as overall market sentiment was lifted by stronger 2Q22 GDP growth at 8.9% (1Q22: 5.0%) and the positive earnings results of most large cap stocks which surpassed consensus expectation.
- Correspondingly, ADV improved 29.5% M-o-M to RM1.7 bil in August (July: RM1.3 bil), with increased trading participation across all investor segment, led by local institutions which rose 34% M-o-M.
- On par with most regional peers, Bursa Malaysia saw positive net foreign flow of RM 1,978 mil in August, a significant increase from net inflow of RM 175 mil in July as foreign funds rotate to ASEAN markets driven by the reopening theme.
 - Foreign funds remained as the largest net buyer in the local bourse this month, extending its net buying position for 7 out of the last 8 months, with YTD net inflow of RM8.2 bil.
- Local institutions further extended their net selling amounted to RM2.4bil in August 2022 (July: -RM41 mil). They were the only net seller in August.
- Local retailers reverted to net buying with +RM141 mil in August after recording their outflow last month.

Fund Flow by Sector and Stock

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

Foreign		Local Institution*		Local Retail*	
Net Buy	Net Sell	Net Buy	Net Sell	Net Buy	Net Sell
Financial +1,686	Technology (276)	Technology +279	Financial (1,680)	Health Care +301	Utilities (74)
Consumer +383	Health Care (62)	Industrial +27	Health Care (395)	Plantation +17	Telco & Media (68)
Utilities +209	Plantation (47)	Property +18	Consumer (333)	Transport & Logistics +17	Consumer (39)

Notes:

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

Figure 2: Top Five Net Fund Flow by Stock (RM Mil), August 22

Foreign				Local Institution*				Local Retail*			
Net Buy		Net Sell		Net Buy		Net Sell		Net Buy		Net Sell	
CIMB	+639	MYEG [s]	(170)	INARI [s]	+110	CIMB	(557)	HARTA [s]	+187	TENAGA [s]	(68)
PBBANK	+461	INARI [s]	(95)	MYEG [s]	+97	MAYBANK	(444)	TOPGLOV [s]	+71	CIMB	(54)
MAYBANK	+354	KLK [s]	(71)	KLK [s]	+72	PBBANK	(443)	MAYBANK	+43	TM [s]	(34)
SIME [s]	+128	WPRTS [s]	(54)	WPRTS [s]	+53	HARTA [s]	(293)	KOSSAN [s]	+35	GENM	(33)
TENAGA [s]	+104	IHH [s]	(52)	IHH [s]	+44	SIME [s]	(138)	MI [s]	+28	AJIYA [s]	(21)

Notes:

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

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- **Foreign investors continued their buying momentum and remained as the largest net buyer YTD, favouring financial sector**
 - Foreign inflow to the financial sector further strengthened by +RM1,686 mil (July: +RM458 mil) on the back of positive 2Q2022 earnings results and outlook in anticipation of OPR hike. Meanwhile, Technology saw the largest net selling interest (-RM276 mil), led by MYEG (-RM170 mil) and INARI (-RM95 mil). The sector outflow was offset by local institutions with +RM279 mil.
 - On a YTD basis, Financial sector (+RM5.2 bil) continued to lead in terms of foreign inflow, followed by Plantation (+RM2.2 bil) and Industrial (+RM1.8 bil). Meanwhile, Technology (-RM916 mil), Transport & Logistics (-RM739 mil), and Health Care (-RM167 mil) experienced the largest foreign outflow.

- **Local institutions were the only net seller in August while adding exposure to Technology and Industrial sectors**
 - Local institutional outflows intensified to RM2.4 bil in August (July: -RM41 mil). This led to the combined January-August net outflow to RM10.3 bil.
 - At sectorial level, they increased their positions in Technology (+RM279 mil) and Industrial (+RM27mil). At stock level, inflow was mainly led by INARI (+RM110 mil), MYEG (+RM97 mil) and KLK (+RM72 mil).
 - As for YTD, local institutions have built up their exposures in Transport & Logistics (+RM683 mil), Technology (+RM373 mil) and Construction (+RM58 mil), while reducing their positions in Financial (-RM4.1 bil), Industrial (-RM2.5 bil) and Plantation (-RM1.8 bil).

- **Healthcare sector recorded highest inflow on bargain hunting in August 2022**
 - Healthcare recorded highest inflow from retailers as they added RM301 mil in August (July: +RM111 mil), particularly glove counters on bargain hunting. This has brought the YTD retailer inflow to Healthcare sector to RM1.1 bil.

Definition

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

ADV	: Average Daily Traded Value
Consumer	: Consumer Products & Services
Industrial	: Industrial Products & Services
IVT	: Proprietary Trading Investment Traders
Market Cap	: Market Capitalisation
Mil	: Million
Bil	: Billion
M-O-M	: Month-on-month
PDT	: Proprietary Day Traders
Transport & Logistics	: Transportation & logistics
YTD	: Year-to-date

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