

Trade Performance

- Total market cap as at end of May slipped to RM1,774 bil amid negative sentiment over inflation, interest rate hikes and disruption in global supply chain.
- In May, total ADV escalated to RM2.39 bil (March: RM2.14 bil), led mainly by foreign ADV which rose by 72% month-on-month.
- Foreign inflow tapered to +RM77 mil in May as compared to +RM825 mil in April.

Fund Flow by Sector

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

Foreign		Local Institution*		Local Retail*	
Net Buy	Net Sell	Net Buy	Net Sell	Net Buy	Net Sell
Plantation +368	Transport & Logistics (411)	Transport & Logistics +376	Industrial (373)	Industrial +169	Utilities (60)
Utilities +230	Financial Services (260)	Financial Services +140	Plantation (327)	Health Care +117	Construction (16)
Industrial +202	Telco & Media (135)	Telco & Media +59	Health Care (158)	Technology +93	REITs (10)

Notes:

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

FINANCIAL SERVICES

- Foreign investors turned net sellers in May with an outflow of -RM260 mil. On weekly basis, the sector saw heavy selling pressure from foreign investors in the first week but reversed to significant net buy in the last week of the month.
- Local institutions added +RM140 mil while local retailers added +RM71 mil in May.

PLANTATION

- Foreign investors further increased their stakes in plantation stocks with +RM368 mil (April: +RM246 mil).
- Meanwhile, local institutions offloaded -RM327 mil.

INDUSTRIAL

- Foreign investors further strengthened their positions with +RM202 mil in May versus April (+RM240 mil). This is the 11th consecutive month with foreign inflow since July 21.
- On the other hand, local institutions sold -RM373 mil while local retailers added +RM169 mil to their portfolios.

HEALTH CARE

- Foreign outflow narrowed to -RM20 mil (April: -RM131 mil) while local institutions turned net sellers with outflow of -RM158 mil.
- Meanwhile, local retailers net bought +RM117 mil of health care stocks in May.

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TECHNOLOGY

- Foreign investors turned net buyers by added +RM4 mil to their portfolios.
- Local institutions offloaded -RM71 mil while local retailers added +RM93 mil in May.

CONSTRUCTION

- Local institutions net purchased for the third consecutive month at +RM17 mil (April: +RM68 mil) amid anticipation of revival of more large-scale infrastructure projects.
- Meanwhile, foreign investors turned net buyers after purchasing +RM8 mil of construction stocks. Outflow from local retailers further intensified to -RM16 mil.

UTILITIES

- Foreign investors turned net purchaser by added +RM230 mil of utilities stocks to their portfolios.
- Local institutions continued to reduce their positions with an outflow of -RM134 mil while local retailers net disposed -RM60 mil of utilities stocks.

TRANSPORT & LOGISTICS

- Foreign capital outflow stood at -RM411 mil in May but was supported by local institutions after they added +RM376 mil to their portfolio.

TELCO & MEDIA

- Local institutions and local retailers added +RM59 mil and +RM61 mil respectively while foreign outflow further intensified to -RM135 mil.

REITs

- Local institutions added +RM21 mil of REITs to their portfolios, reversing their selling trends since Oct 20.

Fund Flow by Stocks

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

Foreign				Local Institution*				Local Retail*			
Net Buy		Net Sell		Net Buy		Net Sell		Net Buy		Net Sell	
MRDIY [s]	+304	WPRTS [s]	(337)	WPRTS [s]	+309	KLK [s]	(249)	TOPGLOV [s]	+81	TENAGA [s]	(68)
KLK [s]	+233	RHBBANK	(239)	RHBBANK	+184	MRDIY [s]	(241)	INARI [s]	+40	HENGYUAN [s]	(36)
TENAGA [s]	+209	AIRPORT	(175)	AIRPORT	+161	MAYBANK	(233)	F&N [s]	+32	GENTING	(23)
MAYBANK	+207	PBBANK	(133)	GENTING	+157	PMETAL [s]	(173)	DIALOG [s]	+30	IOICORP [s]	(18)
PMETAL [s]	+129	DIALOG [s]	(107)	PBBANK	+125	TOPGLOV [s]	(154)	RHBBANK	+28	PETRONM [s]	(17)

Notes:

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

MRDIY

The counter topped in terms of foreign inflow with +RM304 mil. This was in line with MSCI's semi-annual index review which saw MRDIY being added to the MSCI Emerging Market Index. Local institutions net disposed -RM241 mi in the same month.

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KLK

Foreign investors reversed to net buyers after added +RM233 mil of KLK stocks to their portfolios. On the other hand, local institutions turned net sellers and net disposed -RM249 mil.

TENAGA

Local retailers turned net sellers after consecutive buying since Sept 21. Meanwhile, foreign investors turned net buyers by added +RM209 mil.

MAYBANK

Foreign inflow to MAYBANK largely maintained the same at +RM207 mil in May versus +RM210 mil in April. Foreign investors have been buying since Oct 21. On the other hand, outflow was seen from local institutions (-RM233 mil).

PMETAL

Foreign capital inflow further strengthened to +RM129 mil (April: +RM99 mil), supporting the outflow from local institutions (-RM173 mil).

WPRTS

WPRTS led in foreign capital outflow (-RM337 mil) amid its deletion from the MSCI Emerging Market Index during the semi-annual index review. The outflow was supported by net purchase from local institutions (+RM309 mil). Local retailers also added +RM13 mil of WPRTS stocks.

RHBBANK

Foreign investors turned net sellers with -RM239 mil while local institutions added +RM184 mil. Meanwhile, local retailers continued to add RHBBANK to their portfolios at +RM28 mil in May versus +RM12 mil in April.

AIRPORT

Local institutions added +RM161 mil while foreign investors net disposed -RM175 mil in May. Local retailers added +RM6 mil to their portfolios in May.

GENTING

Local retailers turned net sellers after buying for the past two months. Meanwhile, local institutions turned net buyers by adding +RM157 mil in May. Foreign capital outflow was seen for the third consecutive months at -RM62 mil in May.

PBBANK

After foreign capital inflow for four consecutive months, foreign investors net disposed -RM133 mil in May. Meanwhile, local institutions turned to net buyers after adding +RM125 mil in the same month. Inflow from local retailers was minimal at +RM3 mil.

TOPGLOV

Local institutions turned net sellers in May and net disposed -RM154 mil, while local retailers added +RM81 mil. Foreign investors also added +RM28 mil in the same month.

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INARI

Foreign investors reduced their stakes for the third consecutive months while local institutions net sold for the second month. The outflow was supported by local retailers after added +RM40 mil to their portfolios.

F&N

Foreign capital outflow escalated to -RM62 mil in May versus -RM18 mil in April in respond to F&N's deletion from the MSCI Emerging Market Index. Meanwhile, local retailers net purchased +RM32 mil while local institutions added +RM12 mil in May.

DIALOG

Foreign investors significantly reduced their stakes with a net dispose of -RM107 mil in May versus April's -RM29 mil. Local institutions added +RM70 mil while local retailers net bought +RM30 mil in May.

HENGYUAN

Local retailers net disposed for the second consecutive months. In May, outflow intensified to -RM36 mil versus -RM18 mil in May. Foreign capital outflow was minimal with less than RM1 mil while inflow from local institutions was +RM3 mil in the same month.

IOICORP

Foreign capital inflow further moderated to +RM3 mil in May as compared to +RM59 mil in April and +RM157 mil in March. Local institutions turned net buyers by added +RM15 mil of IOICORP stocks. Outflow from local retailers continued for the second month at -RM18 mil.

PETRONM

Outflow from local retailer rose to -RM17 mil in May versus -RM3 mil in April. Foreign investors added +RM11 mil and local institutions net disposed -RM5 mil in the same month.

Definition

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

ADV	: Average Daily Traded Value
Bil	: Billion
Industrial	: Industrial Products & Services
IVT	: Proprietary Trading Investment Traders
Market Cap	: Market Capitalisation
Mil	: Million
Oct	: October

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PDT	: Proprietary Day Traders
REITs	: Real Estate Investment Trusts
Sept	: September
Telco & Media	: Telecommunications and Media
Transport & Logistics	: Transportation & logistics

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