

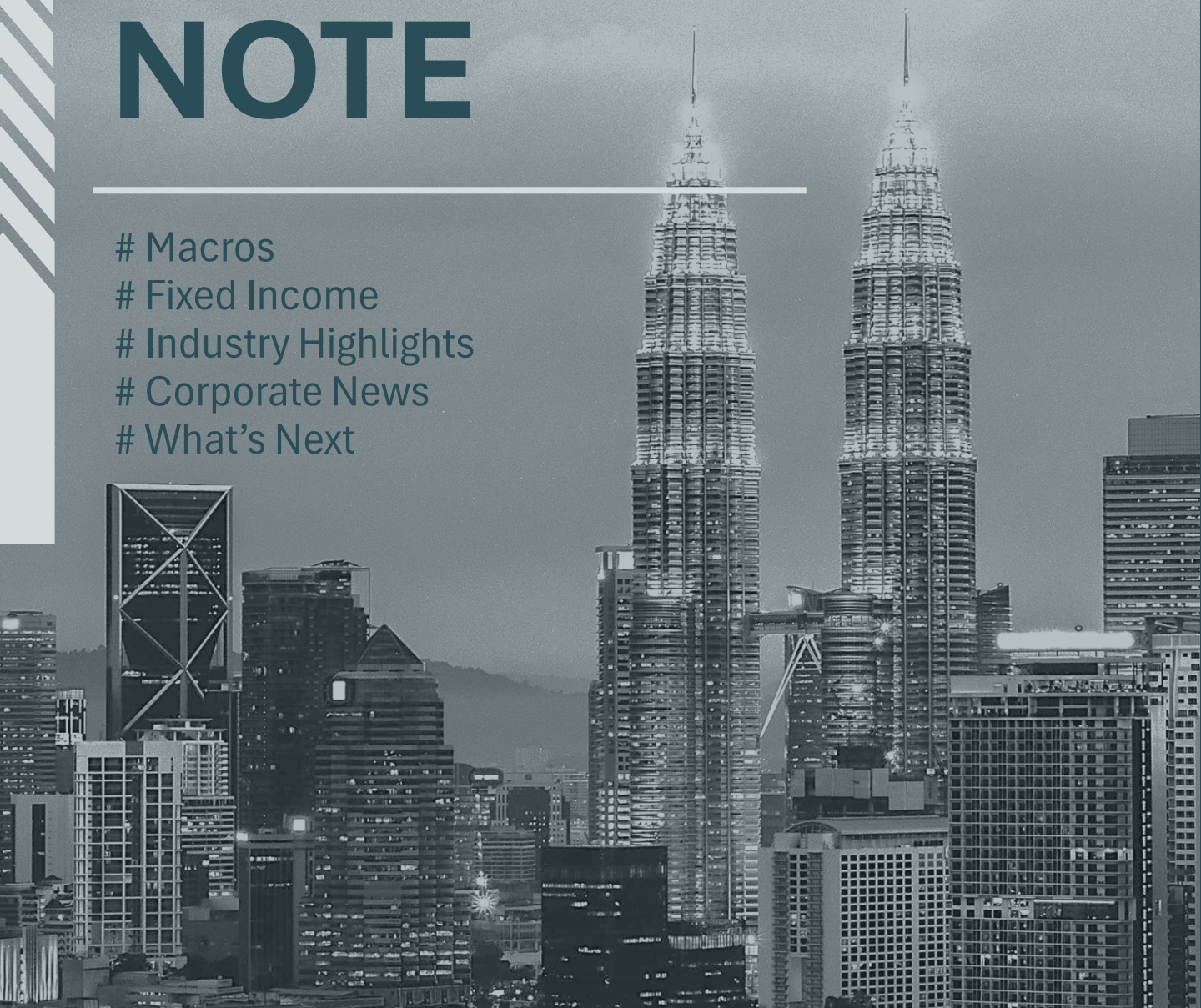


VISION
GROUP

16 June 2026, Tuesday

VISION BOARDROOM NOTE

- # Macros
- # Fixed Income
- # Industry Highlights
- # Corporate News
- # What's Next



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MACROS

Happenings in the broader economy and US/China

Malaysia's economy continued to demonstrate resilience in the most recent readings. Distributive trade sales rose sharply to a record level, driven by broad-based strength in wholesale trade and a notable rebound in motor vehicle sales and related services. Retail trade recorded more moderate growth, suggesting that consumer spending remains positive but has normalised following earlier festive-driven strength. Industrial production also accelerated, supported by sustained expansion in the manufacturing sector, particularly in electrical and electronics, as well as a strong rebound in mining output. These developments reflect solid underlying domestic demand and precautionary inventory accumulation by businesses amid external uncertainties. 2026 GDP growth forecast is maintained at 4.5%, with growth expected to remain firm in the near term. However, should geopolitical tensions persist, elevated energy prices and prolonged supply chain disruptions could weigh on business margins and consumer purchasing power. Upcoming inflation and trade data will be important in assessing the durability of current momentum.

The United States's recent economic data remained resilient. The employment report showed job gains significantly exceeding expectations with upward revisions, while the latest CPI print came in broadly in line with forecasts, although the headline rate reached its highest level since April 2023. Markets were volatile earlier in the week amid geopolitical developments. Major indices closed lower, though losses narrowed after President Trump announced on 14 June that an agreement with Iran has been reached. The deal includes the reopening of the Strait of Hormuz, lifting of the US naval blockade on Iranian ports, and the start of 60-day nuclear talks, with a memorandum of understanding scheduled to be signed in Switzerland. This development further improved risk sentiment and contributed to lower oil prices. The first FOMC meeting under new Fed Chair Kevin Warsh next week is expected to keep policy rates unchanged, with the higher-for-longer narrative continuing to influence market expectations. This comes as the Bank of Japan raised its policy rate to 1%, the highest level since 1995, which could reduce Japanese demand for US Treasuries and add further upward pressure on US yields.

China markets are closely watching the upcoming data releases, including industrial production, retail sales, fixed asset investment and home prices. Recent inflation prints showed a divergence, with PPI accelerating while CPI remained subdued, indicating that weak domestic demand continues to limit cost pass-through. The PBOC is widely expected to maintain its benchmark lending rates unchanged.

Gold and Bitcoin: Gold prices fell sharply last week, declining to ~US\$4,090.30 per ounce before climbing to 4,350.70 at the time of writing, reflecting improved risk sentiment following the positive developments on the US-Iran situation. It continues to act as a key safe-haven asset amid ongoing geopolitical uncertainties and elevated global inflation. Bitcoin remained volatile, moving in line with shifts in broader risk appetite and macro conditions.

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Index	Value	YTD
DJIA	51,671.03	+6.80%
NASDAQ	26,683.94	+14.84%
S&P 500	7,554.29	+10.15%
CSI 300	4,898.14	+3.82%
Shanghai Composite	4,098.85	+1.87%
Hang Seng	24,547.69	-6.80%
Nikkei 225	69,638.36	+34.37%
USD/MYR	4.0590	+0.35%
CNY/MYR	0.6006	+3.24%
Gold	4,350.70	-0.44%
Bitcoin	66,095.15	-24.48%

FBM KLCI (1Y)

Value on 16 Jun 2026 (11:31am): 1,703.51
(YTD: +0.72%)



Food for Thought: NVIDIA RTX Spark and Personal AI Agents

NVIDIA's newly announced **RTX Spark** superchip is designed to bring powerful, on-device AI agents to Windows laptops and compact desktops. Featuring up to 1 petaflop of AI performance and 128GB of unified memory, it enables sophisticated AI agents to run locally rather than relying on the cloud.

Implications for businesses:

Productivity gains: Employees can use local AI agents for coding, data analysis, content creation, and workflow automation with lower latency and better data security.

Competitive edge: Early adopters that integrate on-device AI agents into daily operations may gain meaningful efficiency advantages.

Key takeaway: RTX Spark signals that AI is moving from the cloud to everyday devices faster than expected. Businesses should begin assessing how personal AI agents could impact productivity, IT spending, and workflows over the next 12–24 months.



FIXED INCOME

Happenings in the bonds/fixed income space

MGS/GII: Local government bonds remained resilient, supported by improved risk sentiment following easing Middle East tensions. Benchmark MGS/GII yields were broadly steady to firmer, with the 10-year area holding around 3.58%, suggesting that domestic demand remains intact despite external uncertainty. Investor appetite appears selective rather than aggressive, with positioning still influenced by upcoming central bank decisions and global rate direction. Overall, the market continues to reflect a stable domestic rates backdrop, but with limited room for a strong rally until policy signals become clearer.

Corporate Bonds / Sukuk: Corporate bonds and sukuk remained supported, with activity improving from the previous session. Demand continued to favour higher-quality credits, particularly AA-rated names, while GG and AAA papers also attracted selective interest. This points to a market that is still comfortable with credit risk, but not chasing yield indiscriminately. Investors appear focused on liquid names and shorter-to-medium tenors, where the risk-reward remains more balanced. Overall, credit conditions remain healthy, but selectivity is still the key theme.

US Treasuries: US Treasuries were relatively range-bound as markets assessed the potential impact of the US-Iran peace deal on oil prices, inflation expectations and Fed policy. The 2-year and 10-year UST yields hovered around 4.07% and 4.47%, respectively, reflecting reduced immediate inflation pressure but not enough conviction for a stronger bond rally. Softer economic indicators helped cap yields, although investors are likely to stay cautious until upcoming inflation data and Fed guidance confirm whether rate pressure can ease further.

Malaysian Government Securities (MGS) – Conventional

Tenure	Maturity	Coupon (%)	Trading Yields Close (15 June 2026)	Daily Change (bps)
3-Year	Mar-2029	3.237	3.23	-1
5-Year	Jun-2031	4.232	3.42	-2
7-Year	Apr-2033	3.844	3.54	-2
10-Year	Jul-2035	3.476	3.58	0

Government Investment Issues (GII) – Islamic

Tenure	Maturity	Trading Yields Close (15 June 2026)	Daily Change (bps)
3-Year	Oct-2029	3.22	-2
5-Year	Aug-2030	3.36*	-
7-Year	Mar-2033	3.54	-1
10-Year	Apr-2035	3.58	-3

* Last traded

Major Sovereign Yields (%)

Sov. Yield	Last Close	bps
UST 2Y	4.07	(1)
UST 10Y	4.47	(1)
Germany 10Y	2.95	(4)
UK 10Y	4.81	(2)
Japan 10Y	2.58	(4)
Australia 10Y	4.81	(1)
China 10Y	1.74	(0)

Policy Rates

Central Banks	Current	Next
US Fed Funds	3.75	18-Jun
ECB Deposit Rate	2.25	23-Jul
BOE Base Rate	3.75	18-Jun
RBA Cash Rate	4.10	16-Jun
BOJ Cash Rate	1.00	30-Jul
RBNZ Cash Rate	2.25	08-Jul
PBOC 1Y LPR	3.00	-
BNM OPR	2.75	09-Jul

Source: Bloomberg, Trading Economics, AmBank Economics

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FIXED INCOME

Happenings in the bonds/fixed income space



Recent Bond/Sukuk Issuance

Issuer	Rating	Issue Date	Issue Tenure (Years)	Coupon Rate (%)	Issue Size (RM'mil)
Paramount Capital Resources Sdn Bhd	Not Rated	16-Jun-2026	7.01	-	232.099
Ranhill Sabah Energy II Sdn Bhd	Not Rated	16-Jun-2026	5.00	-	260
Jakel Holdings Sdn Bhd	Not Rated	15-Jun-2026	6.01	-	11.5
Quantum Alpha Sdn Bhd	Not Rated	15-Jun-2026	7.41	-	44.75
Sunway Treasury Sukuk Sdn Bhd	MARC-1 IS(cg) (MARC)	15-Jun-2026	0.33	-	30
Trusmadi Capital Sdn Bhd	MARC-1 (MARC)	12-Jun-2026	0.25	-	205
Trusmadi Capital Sdn Bhd	MARC-1 (MARC)	12-Jun-2026	0.25	-	35
Exsim Capital Resources Berhad	AA3 (RAM)	12-Jun-2026	4.50	4.800	230
CIMB Group Holdings Berhad	Not Rated	12-Jun-2026	1.01	-	450
DRB-HICOM Berhad	A IS (MARC)	12-Jun-2026	88.60	4.850	300
DRB-HICOM Berhad	A IS (MARC)	12-Jun-2026	88.60	4.950	300
Gabungan AQRS Berhad	A IS (MARC)	12-Jun-2026	2.00	7.500	5
Bank Negara Malaysia	Exempted	11-Jun-2026	0.25	-	559
Government of Malaysia	-	11-Jun-2026	1.00	-	500
YTL REIT Bond Berhad	AA2 (s) (RAM)	11-Jun-2026	1.00	3.930	10
CIMB Bank Berhad	P1 (RAM)	11-Jun-2026	0.74	-	60

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FIXED INCOME

Happenings in the bonds/fixed income space



Recent Bond/Sukuk Issuance

Issuer	Rating	Issue Date	Issue Tenure (Years)	Coupon Rate (%)	Issue Size (RM'mil)
AMBank (M) Berhad	P1 (RAM)	11-Jun-2026	1.00	-	400
Gamuda Berhad	P1 (RAM)	10-Jun-2026	0.25	-	300
Sharp Ventures Solar Sdn Bhd	Not Rated	10-Jun-2026	15.01	8.000	15
BGRB Venture Sdn Bhd	Not Rated	10-Jun-2026	1.00	7.000	30

Upcoming Bond/Sukuk Issuance

Issuer	Rating	Issue Date	Issue Tenure (Years)	Coupon Rate (%)	Issue Size (RM'mil)
Public Bank Berhad	P1 (RAM)	18-Jun-2026	0.38	-	250
Sunway Treasury Sukuk Sdn Bhd	MARC-1 IS(cg) (MARC)	18-Jun-2026	0.25	-	35
Perbadanan Kemajuan Negeri Selangor	AA1 (RAM)	19-Jun-2026	7.00	4.090	170
AEON Co. (M) Bhd	AA2 (RAM)	19-Jun-2026	5.00	3.970	250
Cagamas Berhad	MARC-1 (MARC) ,P1 (RAM)	19-Jun-2026	0.26	3.330	120
Mumtaz Rakyat Sukuk Berhad	AA3 (s) (RAM)	19-Jun-2026	10.01	3.960	300

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INDUSTRY HIGHLIGHTS

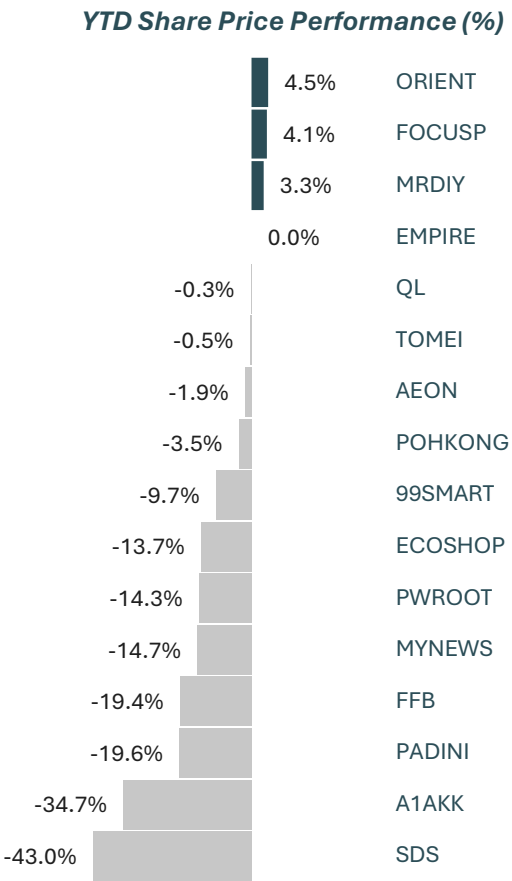
Notable Highlights of the Different Industries in Malaysia



RETAIL / CONSUMER PRODUCTS & SERVICES

Consumer conditions remained highly supportive over the past few weeks, bolstered by robust domestic spending. Malaysia’s April 2026 wholesale and retail trade sales surged 15.3% year on year to RM174.8 billion, marking the fastest pace of growth since September 2022. Together with a 6.2% rise in the volume index, these figures indicate that consumer spending is accelerating strongly, with positive momentum across the wholesale, retail, and motor vehicles sub-sectors.

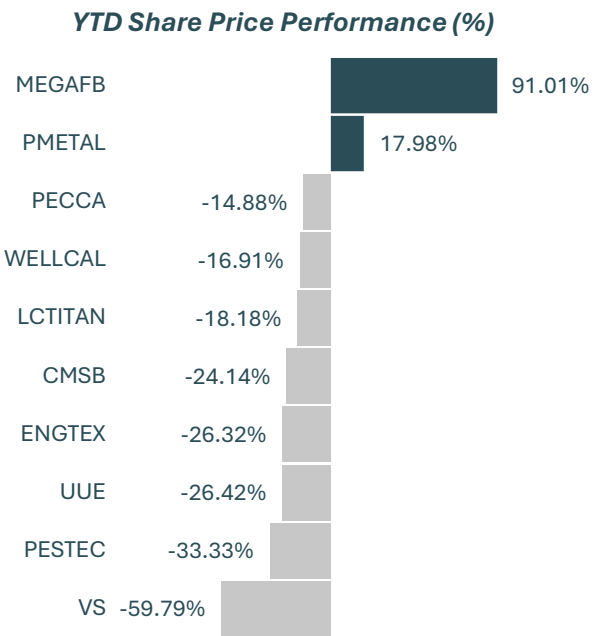
The operating backdrop continues to be stable, although there are minor shifts. Malaysia’s April unemployment rate edged slightly higher to 3.0%, returning to levels last seen in October 2025. Meanwhile, the April CPI increased to 1.9% year on year, driven largely by a 4.1% rise in the transport group. Despite these marginal upticks, the labour market remains relatively resilient with overall employment continuing to increase, and inflation stays broadly contained. This environment should sustain demand for staples and specialised retail, alongside continued robust growth in the e-commerce and digital payment segments.



MANUFACTURING / INDUSTRIAL PRODUCTS & SERVICES

The manufacturing and industrial landscape showed a robust resurgence. Malaysia’s Industrial Production Index (IPI) expanded by an impressive 8.2% year on year in April 2026, registering its highest growth since September 2022. This performance was broad-based, led by an 8.3% increase in manufacturing output, alongside a 6.8% turnaround in the mining sector and a 10.5% expansion in electricity generation.

The latest data points to a strong recovery in both export and domestic markets. Export-oriented industries expanded by 8.5%, heavily supported by a double-digit 14.6% growth in computer, electronics, and optical products, confirming that the electronics-linked export recovery is well underway. Concurrently, domestic-oriented industries grew by 8.0% driven by vigorous motor vehicle manufacturing and food processing. This keeps the medium-term demand story intact and highly constructive for industrial suppliers tied to E&E, automotive, and factory-related build-outs.



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INDUSTRY HIGHLIGHTS

Notable Highlights of the Different Industries in Malaysia

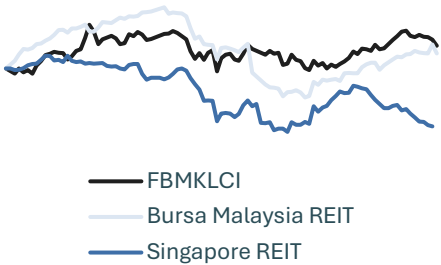
REAL ESTATE INVESTMENT TRUSTS

REITs continue to act as a steady, defensive sleeve for investors, balancing stable income profiles against policy uncertainties. The sector is currently adjusting to shifting tax dynamics, with ongoing market discussions regarding the potential end or renewal of the preferential 10% withholding tax on REIT distributions for non-corporate investors. While this policy narrative has stirred market sentiment, it does not directly impact the underlying earnings of the REITs themselves.

The broader read-through remains constructive. With Bank Negara expected to maintain the Overnight Policy Rate (OPR) at 2.75%, yield seekers continue to look favourably at REITs as a dependable defensive play. Quality retail assets are still benefiting from strong domestic footfall and normalised rental reversions, while industrial REITs remain well-supported by sustained demand tied to the manufacturing, warehousing, and logistics ecosystems.

REIT	Annualised Distribution Yield	NAV	Gearing Ratio
ALAQAR	6.0%	1.250	48.3%
ALSREIT	4.2%	1.124	47.9%
ARREIT	4.0%	1.251	45.5%
AMEREIT	5.4%	1.261	28.8%
AMFIRST	8.7%	1.218	46.6%
ATRIUM	7.5%	1.387	43.5%
AXREIT	5.4%	1.691	32.4%
CLMT	7.9%	0.956	38.9%
HEKTAR	5.3%	1.050	41.5%
IGBREIT	4.0%	1.524	31.0%
IGBCR	7.0%	0.991	26.3%
KIP REIT	8.0%	1.177	39.5%
KLCC	5.1%	7.830	30.5%
PARADIGM	7.7%	1.010	32.8%
PAVREIT	5.9%	1.399	40.1%
SENTRAL	8.7%	1.144	45.6%
SUNREIT	6.6%	1.569	44.1%
TWRREIT	4.1%	1.160	27.7%
UOAREIT	8.6%	1.464	40.5%
YTLREIT	7.8%	1.802	42.8%
AVERAGE	6.24%	-	-

FBM KLCI vs MREIT vs SREIT



FBM KLCI vs MREITs vs SREITs

Between 25 May and 15 June, the FBM KLCI demonstrated a solid recovery trend to hover near the 1,700 psychological mark, driven by a resurgence in large-cap counters and positive global market cues. Meanwhile, the KL REIT Index maintained its steady defensive posture, with MREITs finding continuous support from local income-seeking investors due to a stable 3.0% Overnight Policy Rate (OPR) outlook. In contrast, SREITs appeared to regain some market interest towards mid-June, as investors began actively rotating back into selected Singaporean trusts to lock in attractive yields and position for a shifting global rate cycle.

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Tanco drops to day's low of 12 sen as exchange-set floor lapses

Tanco Holdings Bhd | Property • 15 June 2026

Share price: Last close RM0.130 (15 June 2026); YTD: -88.98%

Tanco Holdings Bhd resumed its decline on Monday, dropping as much as 40% to a 29-month low of 12 sen before closing at 13 sen after Bursa Malaysia's temporary price freeze at 20 sen lapsed. The selling frenzy, which saw over 327 million shares traded, has wiped out more than 90% of the company's peak RM10 billion market value, shrinking its capitalisation to RM828.1 million. Group managing director Datuk Seri Andrew Tan Jun Suan has been actively trading shares amid the crash and confirmed the company is probing the drop, though he did not elaborate. This collapse follows multiple unusual market activity queries from the exchange, occurring just days after Tanco announced a 50MW data centre venture with China Mobile International Ltd in Port Dickson. (Source: [The Edge](#))

Coastal Contracts-led consortium lands US\$204.8 mil gas sweetening plant contract with Mexico's state oil company

Coastal Contracts Bhd | Energy, Infrastructure, Equipment & Services • 11 June 2026

Share Price: Last close RM1.350 (15 June 2026); YTD: 0.00%

A consortium led by Coastal Contracts Bhd's Mexican joint venture has secured a contract from Mexican state-owned oil company Petróleos Mexicanos (Pemex) for the development and operation of a gas sweetening plant, worth US\$204.8 million (RM834.7 million). The contracts follow the completion of emergency infrastructure works on the second Perdiz Plant at Mexico's Ixachi field in early May by Coastoil Dynamic SA de CV (CD), which is 50% owned by Coastal Contracts, and its consortium partners. The engineering, procurement, construction portion of the contract is valued at US\$157.5 million, while the three-year operations & maintenance phase is valued at US\$47.3 million. (Source: [The Edge](#))

PERKESO, 7-Eleven Malaysia in tie-up to help insured persons return to work

7-Eleven Malaysia Holdings Bhd | Retailers • 15 June 2026

Share price: Last close RM1.960 (15 June 2026); YTD: -2.00%

PERKESO has signed a return-to-work (RTW) memorandum of understanding with 7-Eleven Malaysia Holdings Bhd alongside a renewable energy supply agreement with Tenaga Nasional Bhd (TNB) and GSPARX Sdn Bhd. The retail partnership will see 120 insured persons undergoing rehabilitation participate in phased, two-week work trials across 7-Eleven's 2,700-store network to rebuild employment skills and confidence, with the first cohort starting by year-end. Simultaneously, the green energy pact involves installing a photovoltaic solar system at PERKESO's National Neuro-Robotics and Cybernetics Rehabilitation Centre, which is projected to generate over 1,155 megawatt-peak of electricity over 20 years, meeting 30% of the facility's power needs and reducing annual carbon emissions by nearly 945 tonnes. (Source: [TheStar](#))

Frankly Speaking: Legal action on Move Digital puts Capital A's logistics arm at risk

Capital A Bhd | Travel, Leisure & Hospitality • 15 June 2026

Share price: Last close RM0.4350 (15 June 2026); YTD: 6.10%

A Singapore Supreme Court sheriff's notice has targeted assets tied to Capital A's fintech and logistics holdings over a US\$14.7 million claim against its wholly-owned unit, Move Digital Sdn Bhd. The notice covers Move Digital's stakes in BigPay Pte Ltd and Teleport Everywhere Pte Ltd. While management maintains that the claim is fully provisioned and will result in "no losses," a forced transfer or seizure poses a structural dilution risk to Teleport, which generated RM308.7 million in 1QFY2026 (approximately 40% of group turnover) and has become central to Capital A's post-aviation growth identity. (Source: [The Edge](#))

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SD Guthrie Could Realise Johor Land Disposal Gains in 2H FY2026

SD Guthrie Bhd | Plantation • 15 June 2026

Share price: Last close RM6.010 (15 June 2026); YTD: 6.37%

SD Guthrie Bhd's disposal of 942 acres of land in Kulai to Eco World Development Group Berhad's joint venture entity has become unconditional. The land will be disposed at a price of RM815 million to Eco Business Park 8 Sdn Bhd (EBP8). EBP8 is a joint venture between SDG, Eco World Development Group and Permodalan Darul Ta'zim Sdn Bhd, the Johor state government's investment arm, with equity ownership of 45%, 45% and 10% respectively. The joint venture plans to develop the land into an industrial park known as Eco Business Park VIII, with development expected to span about 10 years and generate an estimated gross development value of RM3.75 billion. (Source: [BusinessToday](#))

Pentech's IPO oversubscribed 120.98 times

Pentech Holdings Bhd | Digital Services • 05 June 2026

Share price: Last close RM0.260 (15 June 2026); YTD: 30.00%

Pentech Holdings Bhd's initial public offering (IPO) on the ACE Market of Bursa Malaysia was oversubscribed by 120.98 times. Priced at 20 sen per share, the 31 million shares available to the Malaysian public drew 29,527 applications for 3.78 billion new shares, valued at RM756.28 million. The bumiputra portion achieved an oversubscription rate of 105.44 times with 13,624 applications, whilst the general public portion recorded 15,903 applications, reaching an oversubscription rate of 136.52 times. (Source: [TheStar](#))

EnQuest to acquire stake in four projects for US\$833 mil from PETRONAS

EnQuest PLC | Energy • 10 June 2026

EnQuest PLC, a British energy company is acquiring interest in four offshore production sharing contracts in Malaysia for US\$833 million (RM3.38 billion) from PETRONAS. EnQuest will assume operatorship in oil and gas fields Balingian (90% stake), SK8 (100% stake), and D35-D21-J4 (50% stake) in Sarawak alongside a 30% non-operating interest in PM6-12 in Peninsular Malaysia. The acquisitions will double its output, adding a total 138 million barrels of oil equivalent to its proven and probable reserves and another 208 million barrels of contingent resources. TI Exploration & Production, a joint venture between state-owned Terengganu Inc and Dagang NeXchange Bhd's unit Ping Petroleum Ltd, will also hold a non-operating interest in PM6-12. (Source: [The Edge](#))

TMK Chemical proposes to acquire CCM for RM920 million from Batu Kawan

TMK Chemical Bhd | Chemicals • 12 June 2026

Share price: Last close RM2.360 (15 June 2026); YTD: 72.26%

TMK Chemical Bhd has proposed the acquisition of the Chemical Company of Malaysia Bhd (CCM) from Batu Kawan Bhd for an indicative RM920 million. The transaction, structured on a cash-free and debt-free basis, will be settled through a combination of cash and the issuance of new TMK shares priced at RM1.9098 each. This buyout encompasses Batu Kawan's entire 100% equity interest in CCM, excluding specific assets such as Orica-CCM Energy Systems and two land parcels. Upon successful completion, Batu Kawan is anticipated to hold a minimum 20% stake in the enlarged TMK group. (Source: [TheStar](#))



WHAT'S NEXT?

Key Events Happening Soon

Upcoming IPO

Company	Board	Principal Advisor	Issue for Sale	New Shares
Wil-Key Berhad ("Wil-Key")	ACE	TA Securities Holdings Berhad	38,250,000	88,460,000
Principal Activity: Wil-Key through its subsidiaries, namely Wil-Key International Sdn Bhd and Wil-Key Engineering Sdn Bhd, is a civil and environmental engineering service provider, specialising in the construction of civil and environmental infrastructure, supply and installation of geosynthetic systems, as well as supply of related products and services.				
Rosado Berhad ("Rosado")	ACE	Malacca Securities Sdn Bhd	305,500,000	689,000,000
Principal Activity: Rosado and its subsidiary (the "Group") are principally involved in the provision of M&E engineering solutions, focusing on electrical engineering works for data centre projects.				

Upcoming Listings

Company	Listing Date	Principal Advisor	IPO Price (RM)	PE Ratio	Offer for Sale	Public Issue	Private Placement
Elsa Berhad	16 Jun (ACE)	Malacca Securities	0.23	9.0x	36,400,000	118,400,000	117,112,000
Sum Technology Berhad	18 Jun (ACE)	Malacca Securities	0.28	20.8x	-	117,000,000	90,000,000
HSS Holdings Berhad	23 Jun (ACE)	Malacca Securities	0.18	10.5x	52,500,000	75,000,000	92,500,000
RT Pastry Holdings Berhad	29 Jun (ACE)	KAF IB	0.18	11.6x	-	91,542,000	67,801,100

Estimated Upcoming Earnings Releases

Date	Company	Event Description	Latest Share Price & YTD %
17/06/2026	TOPGLOV	Q3 FY2026	0.780 (+20.93%)
17/06/2026	UWC	Q3 FY2026	6.200 (+50.49%)
19/06/2026	BNASTRA	Q1 FY2027	1.950 (-10.55%)
19/06/2026	IAB	Q4 FY2026	1.370 (+24.55%)

Dividend Calendar

Jun 15	Jun 16	Jun 17	Jun 18	Jun 19
AMBANK RM0.225 PETDAG RM0.18 NATGATE RM0.0025 MSC RM0.04	ATECH RM0.0065 NSOP RM0.05 FM RM0.01 ULICORP RM0.02		GCB RM0.015 HIBISCS RM0.03 AME RM0.07 CSCSTEL RM0.141	MBMR RM0.21 PETRONM RM0.2
Jun 22	Jun 23	Jun 24	Jun 25	Jun 26
FIHB-PB RM0.008	KPJ RM0.01 GFM RM0.002	YTLPOWER RM0.04 CTOS RM0.0057 NEXG RM0.0001	KOSSAN RM0.02 BAT RM0.05 TUNEPRO RM0.013 RHONEMA RM0.01	UOADEV RM0.1 HUPSENG RM0.01 REACHTEN RM0.01 YSPSAH RM0.07

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16th June 2026, Tuesday

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