

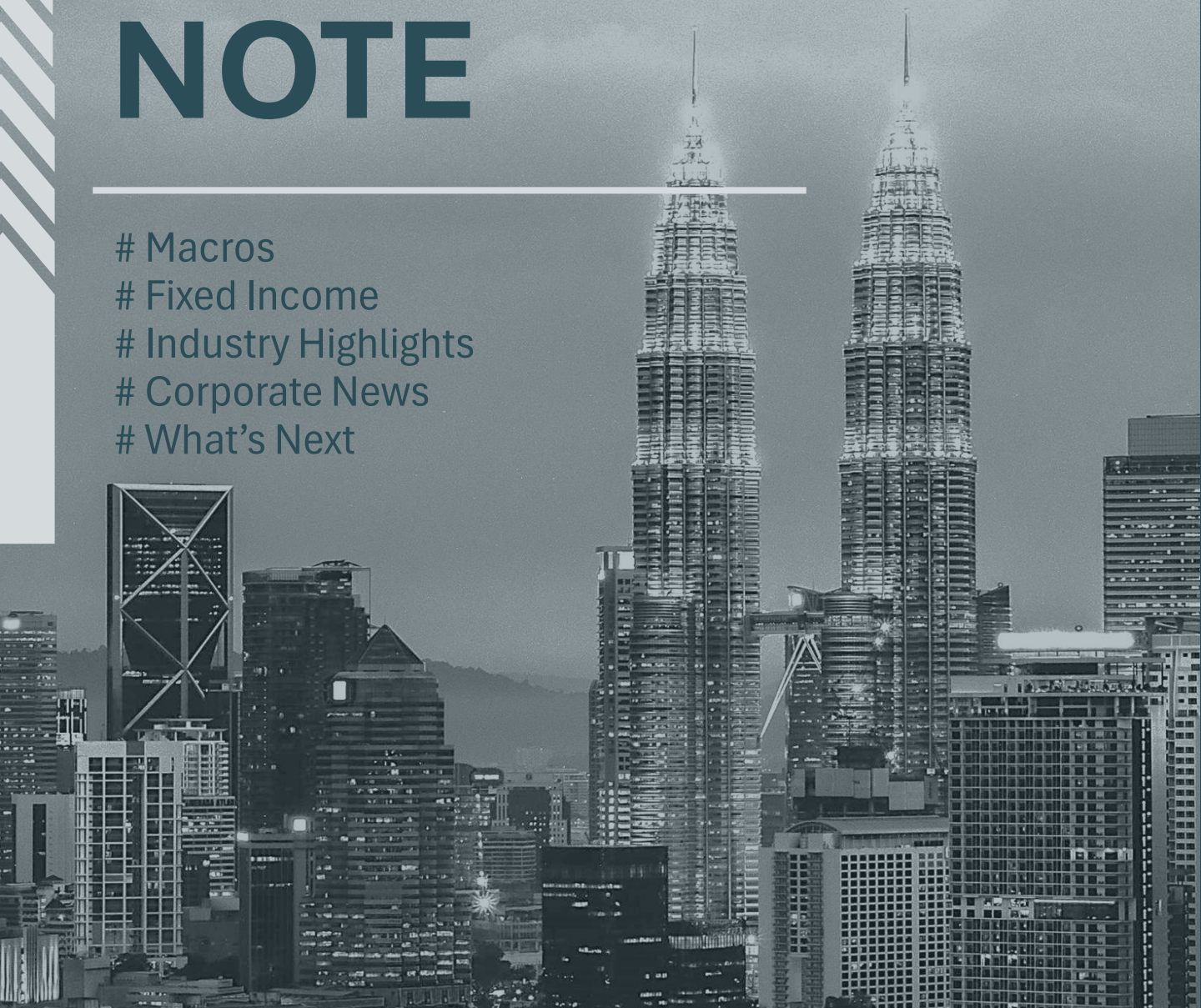


VISION
GROUP

24th February 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 macro backdrop remains constructive into February, led by a firmer ringgit and a stronger external position. The **MYR has been consolidating around the 3.90–3.91/USD range**, underpinned by stable domestic conditions, while near-term moves remain sensitive to the broader USD path (with markets watching US core PCE and geopolitical headlines). **January exports accelerated sharply to +19.6% y/y** (fastest pace in ~40 months), driven by manufacturing (+22.3% y/y) and a strong **E&E upturn (+39.5% y/y)**. Imports, meanwhile, **slowed to +5.3% y/y**, with **capital goods (-20.7% y/y)** and **intermediate goods (-5.1% y/y)** contracting, helping keep the **trade surplus elevated at RM21.4bn**, still above recent-year averages. Separately, domestic fundamentals remain supportive: **4Q25 GDP was revised up to 6.3% y/y** while **January CPI held steady at 1.6% y/y**, reinforcing policy credibility and keeping local rates relatively anchored.

United States markets have been balancing resilient activity data against sticky inflation risks and a more cautious Fed tone. Equities ended mixed over the week (roughly flat to slightly positive), as optimism around selective tech resilience was offset by renewed risk aversion tied to geopolitical developments; oil prices moved higher on Middle East tensions, adding another variable to the inflation narrative. January CPI came in cooler than expected (+0.2% m/m, 2.4% y/y), but policymakers remain wary that disinflation is uneven, with FOMC minutes highlighting comfort with **holding rates steady for longer** and some members still open to tightening if inflation progress stalls. At the same time, real-economy signals on capex and production were firmer than expected, supporting the view that growth is slowing but not breaking; the **2025 trade deficit narrowed to ~US\$901.5bn**, but net exports were not a major growth driver.

China's policy stance remains geared towards stability rather than aggressive easing, reflecting persistent property-sector weakness and uneven credit demand. Market expectations are for the central bank to **keep its 1-year and 5-year loan prime rates unchanged at 3.00% and 3.50%**, respectively, despite still-soft indicators. Recent data points reinforce the cautious approach: **new loans reportedly undershot expectations (about 4.7tn yuan in January)**, while **new and existing home prices continued to fall (around -0.4% m/m and -0.5% m/m)**, signalling that housing remains a drag on confidence and household balance sheets.

Bitcoin has retreated to approximately **US\$67,000** as of February 22, failing to sustain its earlier momentum above the US\$70,000 mark. This decline is largely attributed to persistent risk-off sentiment among institutional allocators, as evidenced by US\$3.8 billion in net outflows from U.S. spot ETFs over the last five weeks. **Gold** has successfully stabilised near **US\$5,100** following a landmark 6-3 U.S. Supreme Court ruling on February 20 that struck down "reciprocal" tariffs under the International Emergency Economic Powers Act (IEEPA). While the ruling initially pressured the dollar, the immediate executive order for a new **10% global tariff** under the Trade Act of 1974 has reinforced gold's safe-haven appeal amid renewed trade volatility and fiscal uncertainty.

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Index	Value	YTD
DJIA	48,804.06	+0.87%
NASDAQ	22,627.27	-2.62%
S&P 500	6,837.75	-1.04%
CSI 300	4,660.41	+0.66%
Shanghai Composite	4,082.07	+2.85%
Hang Seng	27,081.91	+5.66%
Nikkei 225	56,825.70	+9.63%
USD/MYR	3.8950	-3.71%
CNY/MYR	0.5650	-3.04%
Gold	5,183.90	+18.62%
Bitcoin	64,238.21	-26.75%

FBM KLCI

Value at 23 February 2026: 1,757.98
(YTD: +4.64%)



10 Lowest Market Cap Malaysian Companies and Their Profitability in the Past 4 Quarters (x/4)

1. Ireka Corp – Construction – Main Market – RM2.3m – 1/4
2. MMM Group – Media – Main Market – RM4.7m – 4/4
3. Meridian – Property – Main Market – RM5.1m – 0/4
4. Sentoria – Property – Main Market – RM6.2m – 1/4
5. Metronic Global – Industrial Services – Main Market – RM7.7m – 0/4
6. Lambo Group – Software – ACE Market – RM7.7m – 2/4
7. Mlabs Systems – Technology Equipment – ACE Market – RM8.7m – 0/4
8. Techna-X – Other Energy Resources – Main Market – RM8.2m – 0/4
9. DGB Asia – Software – ACE Market – RM9.9m – 1/4
10. Asdion – Software – ACE Market – RM13.0m – 3/4



FIXED INCOME

Happenings in the bonds/fixed income space

MGS/GII: Malaysia govies traded with a **steady-to-firmer bias** overall, underpinned by a supportive domestic backdrop and **healthy onshore demand**, even as global rate swings continued to set the daily rhythm. Liquidity was **uneven**, with a clear slowdown during the holiday-shortened week (average daily secondary volume down to **RM3.17bn** from **RM6.36bn** previously), but interest stayed concentrated in the most liquid benchmarks and off-the-run switches. A key positive was the **strong take-up at the 20Y MGII 5/45 reopening (BTC 2.90x)**, the strongest cover so far this year), which helped reinforce confidence in the longer end. Looking ahead, the market is watching January trade momentum, and the expected **RM5bn reopening of MGS 6/31**, with supply and global volatility remaining the main near-term swing factors.

Corporate Bonds / Sukuk: Corporate credit remained **orderly but selective**, with investors continuing to favour **higher-quality and more liquid** papers while rates stayed headline-driven. Secondary activity was softer during the shortened CNY week (average daily volume down to **RM0.45bn** from **RM1.30bn**), and trading was led by the **government-guaranteed segment** (notably LPPSA and PRASA), with only pockets of activity in AAA/AA names. At the same time, the primary market stayed open, led by **LPPSA's RM5.5bn multi-tranche deal (5Y to 30Y)**, alongside **DANUM's RM1.4bn** and **7-Eleven's RM250m** prints, signalling issuers are still willing to come when windows are available. Secondary market volume for Monday (23 Feb 2026) surged d/d led by DANA 12/33 and MRL 7/36 in the GG segment, SEB 11/28 in the AAA space, and UEMS 9/28 and UOBM 7/37 in the AA space.

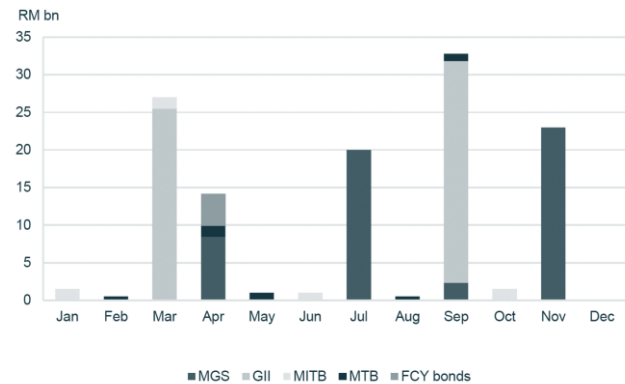
Malaysian Government Securities (MGS) – Conventional

Tenure	Maturity	Coupon (%)	Trading Yields Close (23 Feb 2026)	Daily Change (bps)
3-Year	Apr-2028	3.519	3.03	1
5-Year	May-2030	3.336	3.27	0
7-Year	Jul-2032	3.582	3.43	0
10-Year	Jul-2035	3.476	3.52	0

Government Investment Issues (GII) – Islamic

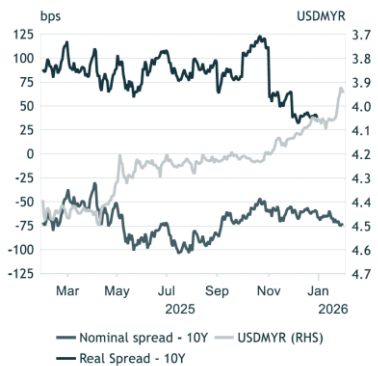
Tenure	Maturity	Trading Yields Close (23 Feb 2026)	Daily Change (bps)
3-Year	Jul-2028	3.10	2
5-Year	Aug-2030	3.26	0
7-Year	Oct-2031	3.36	0
10-Year	Apr-2035	3.52	-1

2026 Maturities (Malaysia)



Source: Bloomberg, CIMB Treasury and Markets Research

US-MY Spreads vs USDMYR



Source: BNM, Bloomberg, MacroBond, CIMB Treasury and Markets Research

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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 Se (RM'mil)
Pac Lease Berhad	AA (MARC)	24-Feb-2026	3.00	3.680	50
YTL Power International Berhad	AAA (RAM)	24-Feb-2026	1.00	3.540	85
Pac Lease Berhad	MARC-1 (MARC)	24-Feb-2026	0.08	-	50
Maybank Islamic Berhad	AAA (RAM)	23-Feb-2026	5.01	3.610	1000
Cagamas Berhad	MARC-1 (MARC), P1 (RAM)	23-Feb-2026	0.24	3.210	100
Sunreit Capital Berhad	P1 (s) (RAM)	23-Feb-2026	0.08	-	70
LYC Mall Sdn Bhd	Not Rated	23-Feb-2026	7.68	-	15

Upcoming Bond/Sukuk Issuance

Issuer	Rating	Issue Date	Issue Tenure (Years)	Coupon Rate (%)	Issue Se (RM'mil)
IJM Treasury Management Sdn Bhd	P1 (s) (RAM)	25-Feb-2026	0.24	-	300
Gabungan AQRS Berhad	MARC-1 IS (MARC)	26-Feb-2026	0.24	-	4
Kimlun Corporation Berhad	Not Rated	26-Feb-2026	1.00	-	10.15
Paramount Capital Resources Sdn Bhd	Not Rated	26-Feb-2026	11.79	-	90.12
Exio Logistics Sdn Bhd	Not Rated	26-Feb-2026	13.23	-	17
Cagamas Berhad	MARC-1 (MARC), P1 (RAM)	27-Feb-2026	0.50	3.270	350
Pac Lease Berhad	AA (MARC)	10-Mar-2026	3.00	3.690	50

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INDUSTRY HIGHLIGHTS

Notable Highlights of the Different Industries in Malaysia

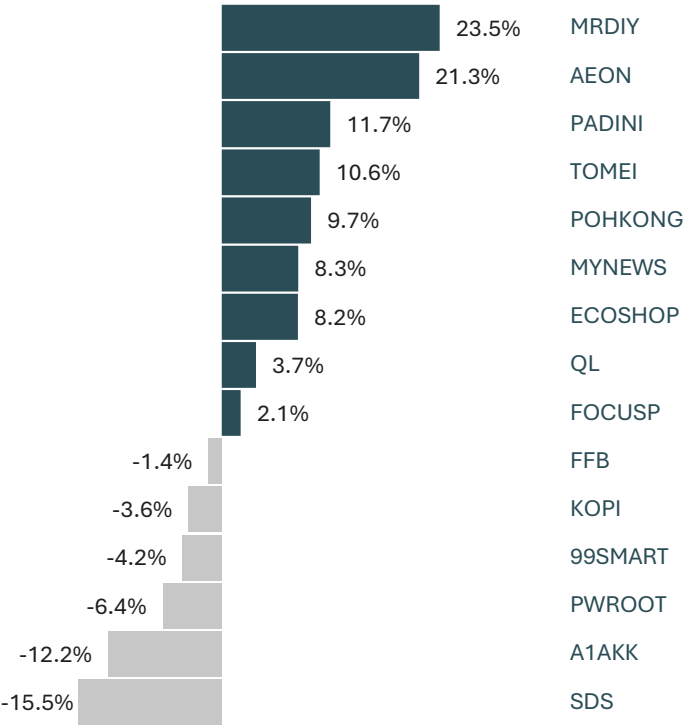
RETAIL / CONSUMER PRODUCTS & SERVICES

Consumer conditions stayed supportive through the fortnight, with inflation still contained. January CPI printed at **+1.6% y-o-y**, while **Transport was negative (-0.7%)**, helping keep everyday cost pressure manageable heading into the festive travel peak and the early Ramadan build up.

Policy support also became more immediate as the **RM100 Sumbangan Asas Rahmah (SARA)** credit (from 9 February) flowed into the system, typically benefitting staples and value led formats first given how the subsidy is spent.

On listed names, **99 Speed Mart (KL:99SMART)** reported **4QFY25 net profit +26.3% y-o-y to RM157.2m on revenue +19.0% to RM3.08b**, with **transactions +17.4% to 141.7m** and store count reaching **3,037 outlets**, reinforcing the “high frequency essentials” theme investors have been paying for in the sector.

YTD Share Price Performance (%)



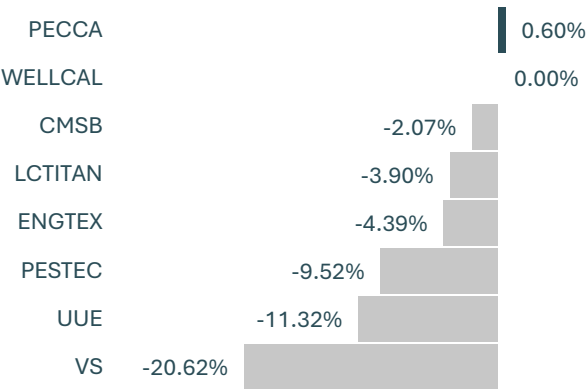
MANUFACTURING / INDUSTRIAL PRODUCTS & SERVICES

Macro prints during 10 to 23 February leaned constructive for industrial sentiment. Malaysia’s **4Q25 GDP grew 6.3% y-o-y**, with **Manufacturing accelerating to 6.1%** (from 4.1% in 3Q25), driven by a strong showing in **Electrical, electronic and optical products (+12.7%)**.

External trade data on **20 February** reinforced the same direction. **Total trade rose 12.6% y-o-y to RM272.4b**, with **exports +19.6% to RM146.9b** and **imports +5.3% to RM125.5b**, widening the trade surplus to **RM21.4b**. The bulletin also pointed to firmer manufactured exports as the main driver.

Within the listed space, **Press Metal (KL:PMETAL)** stayed in focus after fresh research flagged a potential **FY25 core profit above RM2b**, supported by higher aluminium prices and favourable input cost dynamics, keeping metals a preferred pocket within industrials.

YTD Share Price Performance (%)



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INDUSTRY HIGHLIGHTS

Notable Highlights of the Different Industries in Malaysia

REAL ESTATE INVESTMENT TRUSTS

REIT fundamentals stayed stable through 10 to 23 February, supported by steady occupancies and a rates backdrop that remained predictable. Bank Negara Malaysia’s Overnight Policy Rate held at **2.75%**, while the **10 year MGS yield was around 3.52%** in mid February, helping keep funding expectations anchored for income assets.

Policy remained the main swing factor. MRMA reiterated that the withholding tax framework is an important strategic instrument for the sector, keeping attention on post tax yields and valuation support until there is clearer direction.

What to watch next: Post festive leasing momentum, refinancing and capital management activity, and policy clarity on REIT taxation and withholding tax treatment given its direct impact on post tax yields.

REIT	Annualised Distribution Yield	NAV	Gearing Ratio
ALAQAR	5.6%	1.255	41.4%
ALSREIT	1.4%	1.118	48.6%
ARREIT	4.6%	1.266	42.2%
AMEREIT	4.3%	1.118	22.9%
AMFIRST	7.4%	1.200	47.1%
ATRIUM	6.7%	1.387	43.5%
AXREIT	5.1%	1.691	32.4%
CLMT	7.1%	0.956	38.9%
HEKTAR	6.9%	1.046	41.7%
IGBREIT	4.0%	1.524	25.7%
IGBCR	6.6%	0.991	26.3%
KIP REIT	7.2%	1.177	39.5%
KLCC	5.0%	7.830	30.5%
PARADIGM	7.3%	1.051	32.4%
PAVREIT	4.8%	1.371	37.2%
SENTRAL	7.9%	1.144	45.6%
SUNREIT	5.6%	1.569	44.1%
TWRREIT	3.9%	1.160	27.7%
UOAREIT	7.9%	1.464	40.5%
YTLREIT	6.7%	1.802	42.8%

TOURISM / VISIT MALAYSIA 2026

Tourism momentum was tangible through the period, with the Chinese New Year travel peak providing a clean read on arrivals. On **17 February**, Tourism Malaysia reported **32 flights carrying 8,840 passengers** into KLIA Terminals 1 and 2 during the peak morning window, alongside commentary pointing to strong hotel occupancies in key destinations.

VM2026 execution also leaned into demand capture outside Malaysia. Tourism Malaysia participated in Ho Chi Minh City’s **Nguyen Hue Flower Street Festival (15 to 22 February)**, using the high footfall Tet platform to deepen Vietnam market visibility under the VM2026 banner.

Campaign positioning broadened again on **20 February** with Tourism Malaysia pushing an eco tourism angle via the **Malayan sun bear** as a VM2026 icon, signalling a push to pair volume with higher value, experience led travel narratives.

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CORPORATE NEWS

Real updates, market consequences



Kerjaya Prospek Bags RM502m Penang Reclamation Contract

Kerjaya Prospek Group Bhd | Construction • 23 Feb 2026

Share price: Last close RM2.560 (23 Feb 2026); YTD: -3.76%

Kerjaya Prospek Group Bhd (“**Kerjaya**”) has secured a **RM502.3 million contract** for land reclamation and dredging works for the Seri Tanjung Pinang (Phase 2B and 2C) development in Penang. Future Rock Sdn Bhd, a wholly-owned sub-subsidiary of the group, accepted the letter of award from Tanjung Pinang Development Sdn Bhd, an indirect subsidiary of Eastern & Oriental Bhd. The project is slated to commence on 11 March 2026 and is expected to be completed by March 31, 2029. The contract is expected to provide an additional revenue stream for Kerjaya over the next three years and will further strengthen its existing order book. This award, recognised as a recurrent related party transaction previously approved by shareholders, brings the Kerjaya’s total contract wins for the 2026 financial year to RM703.5 million. (Source: [New Straits Time](#))

AirAsia X Bhd Says ‘Unnecessary’ to Launch Big Fundraise Now; Goes for RM166m

AirAsia X Bhd | Travel, Leisure & Hospitality • 21 Feb 2026

Share price: Last close RM1.990 (23 Feb 2026); YTD: +14.37%

AirAsia X Bhd (“**AAX**”) aims to raise a total of **RM166 million** in a one-for-one rights issue of **414 million shares** to existing shareholders and **RM50 million via a share subscription** from new investors, to strengthen its balance sheet. The total amount to be raised is lower than the intended amount of RM500 million. AAX Chief Financial Officer Andrew Littledale explained that a larger fund raise will be unnecessary but also ‘**punitively dilutive**’, as investors may not be able to fund a bigger rights issue. New shares are priced at **28 sen each**, representing a **32.7% discount** than the theoretical ex-all price of the shares of 41.58 sen (as at February 18).

To drive future growth, AAX is implementing a combination carrier strategy, with cargo as the main revenue driver. To underpin this strategy, AAX has established strategic partnership with Teleport Everywhere Pte Ltd and Geodis Malaysia, while continuing negotiations with other global logistic providers. Although current air freight cost are more profitable than passenger seats (averaging at USD7 per kilogram), analysts caution that the eventual recovery of global air travel will likely intensify competition in both the cargo and passenger segments.

(Source: [The Edge](#))

FBG Bags RM238m Contract to Build 25-storey Hotel at JB's Mid Valley Southkey

FBG Holdings Bhd | Construction • 20 Feb 2026

Share price: Last close RM0.155 (23 Feb 2026); YTD: +3.33%

FBG Holdings Bhd (“**FBG**”) has secured a **RM238.1 million contract** to undertake the main building works for a 25-storey hotel above the existing The Mall, Mid Valley Southkey in Johor Bahru. This elevates the FBG’s outstanding order book to **RM1.2 billion**, providing clear earnings visibility through to 2028. The project, awarded by MVS Southpoint Hotel Sdn Bhd to FBG’s wholly owned subsidiary FBG Builder Sdn Bhd. Works are slated to commence on 1 March 2026, with completion anticipated by late June 2028. Group Executive Chairman Tan Sri Chan Kong Choy stated that the contract reflects the confidence of partners in the firm’s technical expertise and will contribute positively to long-term growth. (Source: [EdgeProp](#))

Duopharma Insulin Deals Erases Fear Of Overhang

Duopharma Biotech Bhd | Pharmaceuticals • 20 Feb 2026

Share price: Last close RM1.500 (23 Feb 2026); YTD: +20.00%

Duopharma Biotech Bhd (“**Duopharma Biotech**”) has recently secured two Ministry of Health contracts with a worth roughly **RM118 million**, which cleared the prolong uncertainty regarding the potential loss of its insulin contracts entirely. Although contract values are leaner compared to previous years, the awards are viewed positively as they safeguard Duopharma’s status as a key government supplier. (Source: [The Star](#))

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CIMB Could Net RM810m from Potential CIMB Niaga Stake Sale to Meet Indonesia's Proposed Free Float Rule - HLIB

CIMB Group Holdings Bhd | Financial Services • 16 Feb 2026

Share price: Last close RM8.500 (23 Feb 2026); YTD: +3.03%

CIMB Group Holdings Bhd (“**CIMB**”) may **sell a 7.4% stake** in its Indonesian subsidiary, PT Bank CIMB Niaga TBK (“**CIMB Niaga**”), to comply with proposed increase in Indonesia’s minimum free float requirement from **7.5% to 15.0%**. CIMB currently holds **92.4% stake in CIMB Niaga**, which contributes roughly **25%** of the CIMB’s profit before tax (“**PBT**”). The stake reduction could generate a **RM810.0 million one-off gain**, providing capital for loan growth or special dividends. These proceeds may lift the dividend payout ratio and yield of FYE2026 ~ FYE 2027 to roughly 70.0% and 6.5%, respectively. The regulatory shift in Indonesia resulted from Morgan Stanley Capital International (“**MSCI**”)’s concern over the investability and transparency of the Indonesia Stock Exchange (“**IDX**”). Final decision on the new framework is expected to be made by May, before MSCI’s reassessment. (Source: [The Edge](#))

Sunway Healthcare Targets RM16b Valuation Amid Market Rout

Sunway Healthcare Holdings Bhd | Health Care Providers • 16 Feb 2026

IPO price: N/A; Scheduled listing: N/A (Main Market)

Sunway Healthcare Holdings Bhd (“**SHH**”) seeks a valuation of **RM16 billion** based on an estimated **55.4x** forward price-to-earning (“**P/E**”) ratio for financial year 2026. This valuation is significantly higher than its peers such as IHH Healthcare Bhd and KPJ Healthcare Bhd trading at 34.8x and 32.1x, respectively. However, the market sentiment seems challenging for high valuation companies. Bursa Malaysia Healthcare Index performance retracted by 23.5% in a year, and previously highly valued company such as MMC Port Holdings Bhd (“**MMC Port**”)’s proposed IPO was delayed.

The prospectus is expected to release in the **Q1 2026**, and the IPO will comprise roughly **1.97 billion shares**, consisting of **1.4 billion existing shares** and **575 million new shares**. Maybank Investment Bank and AmInvestment Bank will act as joint principal advisers, joint global coordinators, joint bookrunners, and joint underwriters for the IPO. (Source: [The Edge](#))

Kee Ming More than Doubles in ACE Market Debut

Kee Ming Group Bhd | Industrial Products & Services (M&E Engineering) • 12 Feb 2026

Share price: Last close RM0.795 (23 Feb 2026); YTD: -8.62%

Following its overwhelming initial public offering (“**IPO**”) performance with 50 times oversubscription from the Malaysian public, the stock opened at 79 sen, more than twice the value of IPO price of 38 sen per share. The strong IPO and listing performance was supported by the strong demand for mechanical and electrical (“**M&E**”) engineering firm, as well as strategic association with Solarvest Holdings Bhd (“**Solarvest**”). (Source: [The Edge](#))

Boustead Holdings Proposes to Privatise Boustead Heavy Industries Corp in RM149.6m deal

Boustead Heavy Industries Corporation Bhd | Industrial Products & Services • 10 Feb 2026

Share price: Last close RM0.455 (23 Feb 2026); YTD: +62.50%

Boustead Holdings Berhad (“**BHB**”) has proposed a RM 149.6 million privatisation of its 72.4%-owned subsidiary, Boustead Heavy Industries Corporation Bhd (“**BHIC**”), via a selective capital reduction (“**SCR**”) and cash repayment of **48 sen per share**, a **54.8% premium** to BHIC’s last traded price of 31 sen on February 6. By delisting BHIC, the Group aims to gain operational flexibility to execute long-term strategies and accelerate corporate exercises under a privatised structure. This reflects the broader group-wide consolidation by Lembaga Tabung Angkatan Tentera (“**LTAT**”) following its recent privatisations of Boustead Plantations and BHB itself. (Source: [The Edge](#))

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WHAT'S NEXT?

Key Events Happening Soon

Upcoming IPO

Company	Board	Principal Advisor	Issue for Sale	New Shares
RedPlanet Berhad ("RedPlanet")	ACE	UOB Kay Hian (M) Sdn Bhd	10,000,000	70,000,000
Principal Activity: Through its subsidiaries, it is principally involved in the information and communication technology ("ICT") solutions sector, providing design and implementation of geospatial solutions and intelligent rail solutions, trading of ICT solutions and ancillary hardware, as well as provision of maintenance and support services to customers for the geospatial solutions and intelligent rail solutions.				

Upcoming Listings

Company	Listing Date	Principal Advisor	IPO Price (RM)	Valuation (P/E Multiple)	Issue for Sale	New Shares	Private Placement
OGX Group Berhad ("OGX")	12/03/2026 on ACE	UOB Kay Hian (M) Sdn Bhd	0.35	17.2x	75,000,000	150,000,000	168,750,000
Whitman Holdings Berhad ("Whitman")	26/02/2026 on LEAP	Wyncorp Advisory Sdn Bhd	0.10	12.0x	-	-	24,300,000

Upcoming Events

Date	Event Details
17-18/03/2026	USA: Federal Open Market Committee Meeting + summary of Economic Projections
05/03/2026	Malaysia: Bank Negara Monetary Policy Committee Meeting

Estimated Upcoming Earnings Release

Date	Company	Event Description	Latest Share Price & YTD %
24/02/2026	Aumas Resources Berhad ("AuMAS")	Q1 2026 Earnings Release	0.63 (+7.76%)
24/02/2026	Bintulu Port Holdings Berhad ("BPHB")	Q4 2025 Earnings Release	5.4 (+0.00%)
24/02/2026	Edeltec Holdings Berhad ("Edeltec")	Q4 2025 Earnings Release	0.45 (-5.32%)

Upcoming Dividends

Company	Ex Date	Payment Date	Dividends (RM)	Latest Share Price & YTD %
Go Innovate Asia Berhad ("GIAB")	24/02/2026	27/02/2026	0.0099	0.03 (0.00%)
Westports Holdings Berhad ("Westports")	24/02/2026	25/03/2026	0.1192	6.26 (+10.41%)
Cengild Medical Berhad ("Cengild")	24/02/2026	13/03/2026	0.0033	0.23 (+2.22%)

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