

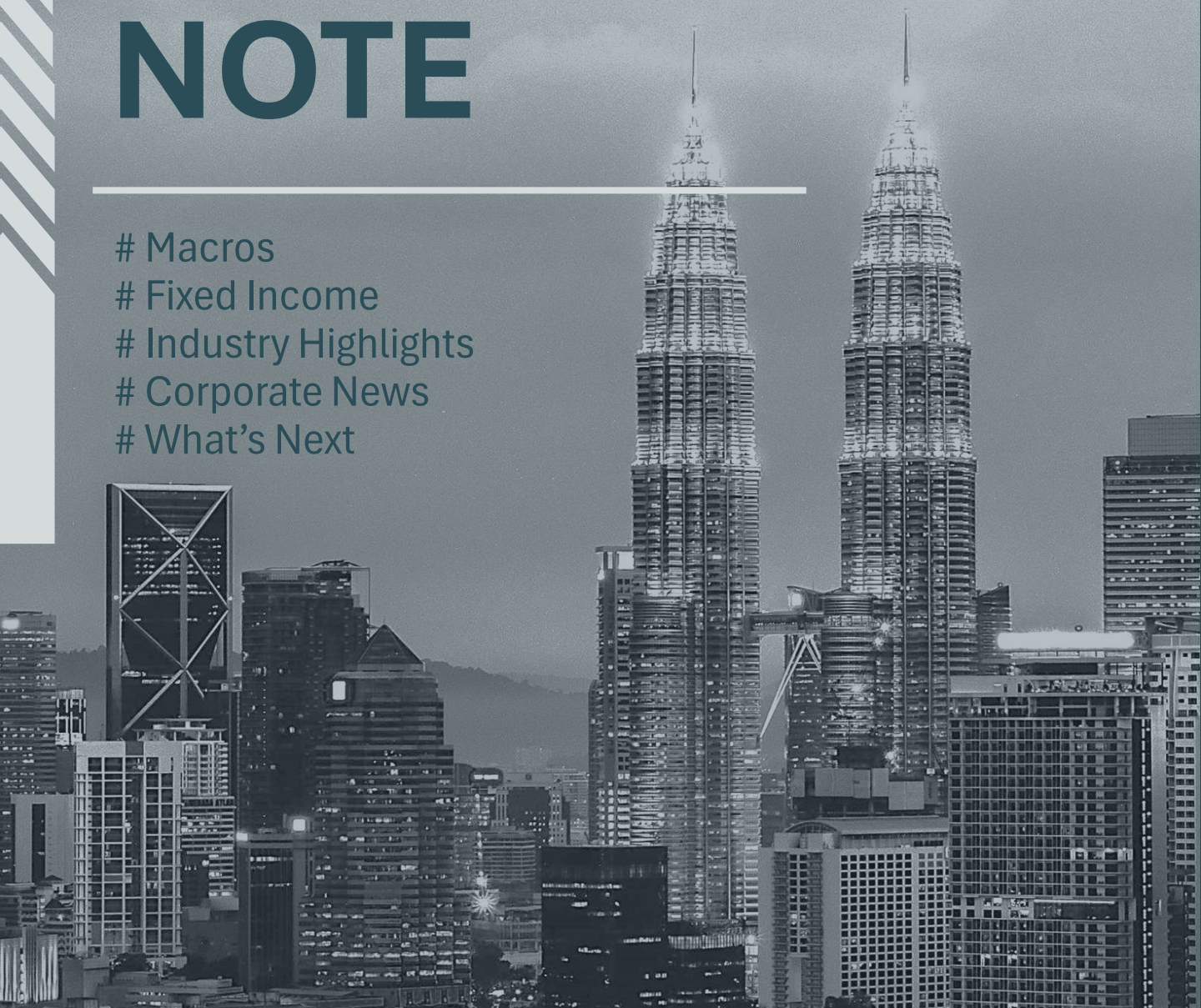


VISION
GROUP

5th May 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/Singapore

Malaysian's economy remained resilient through early May, with the ringgit stabilising near 3.9590 against the US dollar and maintaining its 3.1077 pivot against the Singapore dollar. Malaysia's status as a net energy exporter and its diversified economic base provided essential buffers, resulting in RM3.3bn in net foreign bond inflows for March, while equities recorded a marginal RM0.1bn outflow. Domestic monetary conditions strengthened as narrow money (M1) accelerated to 11.4% and broad money (M3) rose to 5.5%. Credit traction was particularly robust; total loan applications surged 12.0% YoY, propelled by a 27.9% jump in business segment demand, specifically within the construction and retail trade sectors. In the debt markets, the Private Debt Securities (PDS) segment saw active trading in Danainfra and LPPSA, while MGS yields shifted 1–3bp higher, settling the 10-year yield at 3.57%. Analysts maintain a 2026 GDP growth forecast of 4.5% and inflation at 2.0% as focus shifts to the Bank Negara Malaysia policy decision scheduled for 7 May 2026.

United States's macro showed Q1 2026 real GDP growth at 2.0% (annualised q/q), up from 0.5% in Q4 2025; within the details, private consumption growth slowed to 1.6% and net trade was a drag (net exports contribution: -1.3ppt), while business investment was supported by gains in equipment and intellectual property (including reported strength in IT/software). At the 30 April FOMC, the Fed kept the policy rate unchanged at 3.50%–3.75% and revised its statement language to say “inflation remains high, in part due to the recent rise in global energy prices”, while describing the Middle East shock as creating a “high degree of uncertainty”; three regional Fed presidents voted against including an explicitly accommodative tilt in the statement. Separately, the Iran-related energy shock was cited as pushing up inflation assumptions: Brent rose by more than 25% after hostilities began, peaking above US\$120/bbl and settling near US\$110/bbl in early April, with US gasoline prices above US\$4/gallon;

Singapore's near-term activity data remained firm into end-April, with March industrial production rising 10.1% y/y (+4.7% m/m, SA), and electronics output up 30.0% y/y (driven by semiconductors and infocomms/consumer electronics), while 1Q26 manufacturing output increased 7.9% y/y; based on this, some forecasters expect 1Q26 GDP to be revised higher to 5.3% y/y versus the MTI advance estimate of 4.6% y/y, while maintaining a 2026 GDP projection of 3.0%. Sectoral divergence and external sensitivity were flagged: chemicals stayed weak (petroleum/petrochemicals), and parts of transport engineering (marine & offshore) remained a drag, with risks tied to Middle East-linked energy market disruptions and potential constraints in critical inputs such as helium, alongside uncertainty from the US Section 301 investigation process.

Gold and Bitcoin moved in opposite directions through April. The SPDR Gold MiniShares Trust (GLDM) fell 1.4% for a second consecutive month and was last shown at US\$91.21, after reaching US\$96.68 in mid-April before pulling back. ProShares Bitcoin Strategy ETF (BITO) rose 12.5% in April and was shown at US\$10.74, with the report noting a breakout above US\$10.20 (cited as near-term support) and referencing US\$11.40 as a prior swing level. In early May, a separate market snapshot put Comex gold at 4,644.50 on 4 May (+0.32% on the day) and referenced gold trading around 4,600 with a 4,100–5,000 range and 4,445 highlighted as a key support level.

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Index	Value	YTD
DJIA	48,941.90	+1.16%
NASDAQ	25,067.80	+7.89%
S&P 500	7,200.75	+4.99%
CSI 300	4,807.31	+1.90%
Shanghai Composite	4,112.16	+2.21%
Hang Seng	25,945.75	+1.23%
Nikkei 225	59,513.12	+14.82%
USD/MYR	3.9600	-2.10%
CNY/MYR	0.5803	-0.01%
Gold	4,548.50	+4.08%
Bitcoin	80,336.47	-8.22%

FBM KLCI

Value on 5 May 2026 (9:35am): 1,737.16
(YTD: +3.38%)



Food for thought: Malaysia's Lag vs the Global Risk Rally

While global inflation is projected to reach 4.4% in 2026, Malaysia's status as a net energy exporter and its continued use of fuel subsidies provide a critical buffer for local consumers. However, commercial businesses are already feeling the pressure of rising input costs for essential materials like chemicals and electronics. This is evidenced by a 27.9% surge in business loan applications, as firms increasingly rely on credit for working capital to manage mounting operational costs. While subsidies delay the immediate impact, they do not eliminate the underlying cost pressure; long-term resilience will depend on improving operational efficiency rather than relying on the permanent sustainability of the state's fiscal "shield".



FIXED INCOME

Happenings in the bonds/fixed income space

MGS/GII: Local govies traded choppy but broadly anchored into the long-weekend stretch, as investors balanced firmer domestic support (including a stronger MYR backdrop through April) against headline-driven inflation risk from oil and the Strait of Hormuz. In April, the broader ringgit bond market held up well, with the all-bond index rising about 0.57% while the MGS curve shifted lower across tenors. Near term, price action remains sensitive to swings in energy and global core rates, with liquidity still able to spike around month-end positioning (government bond secondary volume was RM9.27bn in the session captured).

Corporate Bonds / Sukuk: Corporate credit remains orderly but selective, with the market continuing to favour higher-quality and more liquid names when rate volatility rises. Secondary trading improved into month-end, with corporate bond/sukuk turnover at RM1.292bn in the session captured and activity led by AA-rated flow, while GG and AAA papers also featured prominently. Overall, liquidity continues to gravitate to familiar benchmark-style lines, which is consistent with a “carry, but quality first” tone.

US Treasuries: USTs remain headline and data-driven, with the key swing factor still the Middle East risk premium via oil. Recent price action stabilised as tensions around Hormuz showed signs of easing and oil pulled back, helping Treasuries firm and the curve briefly bull-steepen. Even so, volatility stays elevated: yields have been reacting to each new turn in the geopolitical narrative, alongside inflation-sensitive data such as ISM prices and core PCE.

Malaysian Government Securities (MGS) – Conventional

Tenure	Maturity	Coupon (%)	Trading Yields Close (04 May 2026)	Daily Change (bps)
3-Year	Mar-2029	3.237	3.21	0
5-Year	Jun-2031	4.232	3.35	0
7-Year	Jul-2032	3.582	3.44	0
10-Year	Jul-2035	3.476	3.56	-1

Government Investment Issues (GII) – Islamic

Tenure	Maturity	Trading Yields Close (04 May 2026)	Daily Change (bps)
3-Year	Oct-2029	3.19	2
5-Year	Aug-2030	3.31	0
7-Year	Mar-2033	3.52	4
10-Year	Apr-2035	3.59	0

* Last traded

Major Sovereign Yields (%)

Sov. Yield	Last Close	bps
UST 2Y	3.88	1
UST 10Y	4.37	(0)
Germany 10Y	3.04	0
UK 10Y	4.96	(5)
Japan 10Y	2.52	(1)
Australia 10Y	5.02	(4)
China 10Y	1.75	0

Source: Bloomberg, Trading Economics, AmBank Economics

Policy Rates

Central Banks	Current	Next
US Fed Funds	3.75	18-Jun
ECB Deposit Rate	2.00	11-Jun
BOE Base Rate	3.75	18-Jun
RBA Cash Rate	4.10	05-May
BOJ Cash Rate	0.75	16-Jun
RBNZ Cash Rate	2.25	27-May
PBOC 1Y LPR	3.00	-
BNM OPR	2.75	07-May

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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)
Sunway Cochrane Sdn Bhd	Not Rated	04-May-2026	4.60	-	59.852
WCT Holdings Berhad	A+ IS (MARC)	30-Apr-2026	2.00	5.050	50
Singer (Malaysia) Sdn Bhd	A (MARC)	30-Apr-2026	1.00	7.000	2.75
Sunsuria Berhad	MARC-1 IS (MARC)	30-Apr-2026	0.50	-	108
SunREIT Unrated Bond Berhad	Not Rated	30-Apr-2026	1.00	-	50
SunREIT Unrated Bond Berhad	Not Rated	30-Apr-2026	1.00	3.720	110
ARREIT MTN 1 Sdn Bhd	Not Rated	30-Apr-2026	4.14	-	3.7
Bank Negara Malaysia	Exempted	30-Apr-2026	0.25	-	370
Gabungan AQRS Berhad	MARC-1 IS (MARC)	30-Apr-2026	0.25	-	15
Pac Lease Berhad	AA (MARC)	30-Apr-2026	3.00	3.800	100
Malaysia Rail Link Sdn Bhd	Government Guaranteed	30-Apr-2026	0.50	-	1250
Exio Logistics Sdn Bhd	Not Rated	30-Apr-2026	13.05	-	26
Perlaburan Hartanah Berhad	AAA (RAM)	30-Apr-2026	2.00	3.750	300
Toyota Capital Malaysia Sdn Bhd	AAA (s) (RAM)	29-Apr-2026	4.00	3.750	100
Cagamas Berhad	MARC-1 IS (MARC) ,P1 (RAM)	29-Apr-2026	0.50	3.400	500
Zetrix AI Berhad	AA- IS (MARC)	29-Apr-2026	2.00	5.450	122.5

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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)
EVYAP Sabun Malaysia Sdn Bhd	AA IS (MARC)	29-Apr-2026	5.00	4.100	500
SaraVent Capital Sdn Bhd	Not Rated	28-Apr-2026	1.00	-	1850
Malaysia Rail Link Sdn Bhd	Government Guaranteed	28-Apr-2026	0.50	-	750
Hap Seng Management Sdn Bhd	Not Rated	28-Apr-2026	3.00	-	75
Hap Seng Management Sdn Bhd	Not Rated	28-Apr-2026	4.00	-	90
Hap Seng Management Sdn Bhd	Not Rated	28-Apr-2026	5.00	-	135
Bank Islam Malaysia Berhad	AA3 (RAM)	28-Apr-2026	7.01	4.010	500
Bank Islam Malaysia Berhad	AA3 (RAM)	28-Apr-2026	10.01	4.100	500
Kimlun Corporation Berhad	Not Rated	28-Apr-2026	0.50	-	26.4

Upcoming Bond/Sukuk Issuance

Issuer	Rating	Issue Date	Issue Tenure (Years)	Coupon Rate (%)	Issue Size (RM'mil)
KIP REIT Capital Sdn Bhd	Not Rated	05-May-2026	5.24	-	90
Gamuda Land (T12) Sdn Bhd	P1 (s) (RAM)	05-May-2026	0.24	-	300
Paramount Corporation Berhad	Not Rated	06-May-2026	93.33	5.000	90
Leong Hup Capital Sdn Bhd	Not Rated	06-May-2026	4.00	-	200

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INDUSTRY HIGHLIGHTS

Notable Highlights of the Different Industries in Malaysia



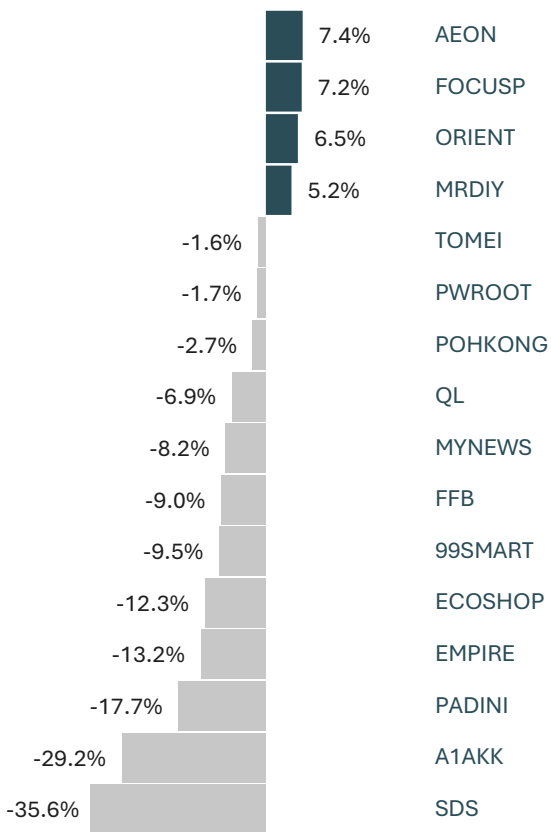
RETAIL / CONSUMER PRODUCTS & SERVICES

Malaysia’s retail and consumer sector demonstrated robust momentum entering 2Q2026, with February retail trade sales expanding a strong 7.7% YoY to RM70.1 billion, the fastest monthly gain in over a year, lifting overall wholesale and retail trade value 5.3% YoY to RM156.3 billion. Growth was broad-based, led by non-specialised stores (+10.4%), pharmaceuticals/medical goods, clothing, household equipment and F&B categories.

Retail Group Malaysia continues to project full-year 2026 industry growth of around 4.0%, with 2Q2026 expected to moderate from the stronger 1Q pace as post-festive demand normalises and consumers adopt a more selective, value-conscious stance amid lingering cost-of-living pressures. Higher fuel and logistics expenses linked to Middle East developments remain the primary near-term watchpoint.

Staples, daily F&B essentials and value-oriented formats are anticipated to retain relative resilience, while discretionary categories (fashion, jewellery, big-ticket items) are likely to face tighter spending discipline. Broader private consumption is expected to stay broadly resilient, underpinned by stable labour market conditions (unemployment ~2.9%), civil-servant wage adjustments and ongoing fiscal transfers.

YTD Share Price Performance (%)

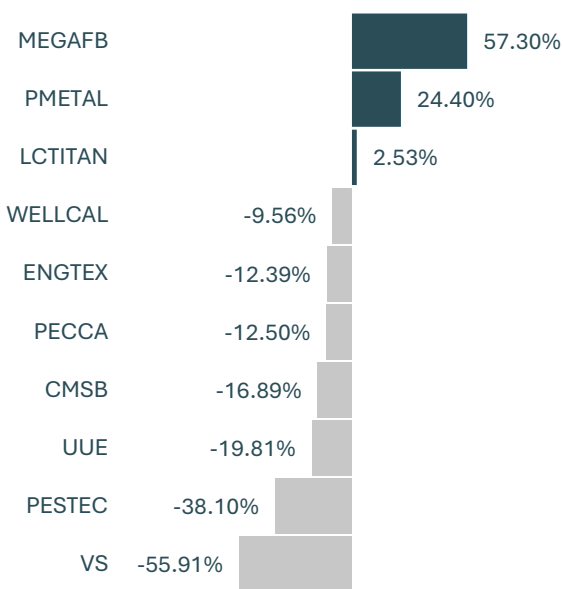


MANUFACTURING / INDUSTRIAL PRODUCTS & SERVICES

Malaysia’s manufacturing sector extended its recovery in April 2026, with the S&P Global Manufacturing PMI rising to 51.6 from 50.7 in March, the highest reading in nearly four years. The expansion was led by accelerated output growth, new order inflows and sustained hiring, reflecting improved demand conditions and successful tender wins. Broader industrial activity remains supported by data-centre and AI-related M&E/EPCC projects, multi-year infrastructure pipelines, and ongoing supply-chain relocation into Malaysian industrial parks.

Input-cost pressures continue to shape the operating environment. Elevated oil prices and potential disruptions in petrochemicals, fertilisers, and industrial gases are feeding through to freight, utility, and raw-material expenses. Nonetheless, medium-term fundamentals stay constructive: approved investments typically have an 18–24 month realisation lag, providing visibility into project pipelines and supporting capex momentum even as near-term margins face scrutiny.

YTD Share Price Performance (%)



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INDUSTRY HIGHLIGHTS

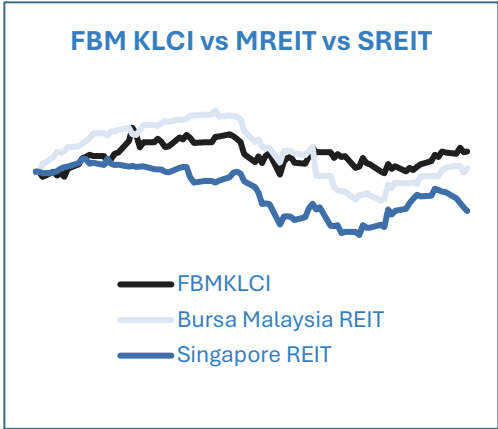
Notable Highlights of the Different Industries in Malaysia

REAL ESTATE INVESTMENT TRUSTS

M-REITs continue to demonstrate defensive characteristics and stable income delivery, with the sector’s average annualised distribution yield holding at 6.15% as at 5 May 2026. Despite the removal of the 10% withholding tax concession, the KLREI has still posted positive year-to-date performance, outperforming the broader FBM KLCI in recent periods on the back of resilient occupancy, positive rental reversions and domestic-centric earnings. The current dividend yield spread over the 10-year MGS (trading near 3.57%) remains attractive at approximately 250 bps, reinforcing the sector’s appeal as a high-quality income vehicle in a stabilised interest-rate environment.

Broader sector fundamentals remain constructive, with new acquisitions, asset enhancements and limited supply pressure providing further earnings visibility. While near-term cost pressures from energy and logistics persist, high occupancy rates and strategic capital recycling continue to underpin distribution stability for listed-company portfolios.

REIT	Annualised Distribution Yield	NAV	Gearing Ratio
ALAQAR	5.7%	1.250	48.3%
ALSREIT	4.9%	1.124	47.9%
ARREIT	4.0%	1.251	45.5%
AMEREIT	4.9%	1.261	28.8%
AMFIRST	8.8%	1.218	46.6%
ATRIUM	7.5%	1.387	43.5%
AXREIT	5.3%	1.691	32.4%
CLMT	7.7%	0.956	38.9%
HEKTAR	5.1%	1.050	41.5%
IGBREIT	4.0%	1.524	31.0%
IGBCR	6.9%	0.991	26.3%
KIP REIT	7.9%	1.177	39.5%
KLCC	5.2%	7.830	30.5%
PARADIGM	7.3%	1.051	32.4%
PAVREIT	5.6%	1.399	40.1%
SENTRAL	8.7%	1.144	45.6%
SUNREIT	5.9%	1.569	44.1%
TWRREIT	4.3%	1.160	27.7%
UOAREIT	8.6%	1.464	40.5%
YTLREIT	7.8%	1.802	42.8%
AVERAGE	6.15%	-	-



FBM KLCI vs MREITs vs SREITs

Q1 results of selected M-REITs remained solid, with Axis REIT reporting net profit of RM53.21 million (+8.3% YoY) and IGB REIT posting revenue of RM261.3 million (+52.4% YoY), supported by retail strength and Visit Malaysia 2026 tailwinds.

Singapore REITs (iEdge S-REIT Index) recorded negative total returns of 6.4% in 1Q2026, driven largely by rising Singapore government bond yields and stagflation concerns stemming from Middle East geopolitical tensions. This resulted in valuation compression despite robust underlying performance: aggregate sampled S-REITs delivered 8.0% YoY gross revenue growth and 7.9% YoY net property income growth, with standout results from Frasers Centrepoint Trust (+20.3% revenue / +20.2% NPI) and Suntec REIT (+23.9% YoY DPU).

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IJM Corp fast-tracks three-year value unlocking plan post-Sunway bid

IJM Corporation Bhd | Construction • 24 Apr 2026

Share price: Last close RM2.40 (04 May 2026); YTD: 5.73%

Following the lapse of Sunway Bhd's RM11 billion takeover offer in early April, IJM has established a board-level committee to oversee a three-year asset unlocking exercise. Management expects to decide within the next two months the final framework for a pure construction listing, which would carry a 12-month execution timeline. The strategic exit from India involves a two-year window to optimise disposal gains, while IJM has already secured RM6.5 billion in job wins year-to-date, hitting its FY26 replenishment target of RM6 to RM8 billion. (Source: [The Star](#))

SkyeChip Berhad launches RM352 million IPO on MAIN Market

SkyeChip Berhad | Technology • 29 Apr 2026

Penang-based integrated circuit designer SkyeChip Bhd aims to raise RM352 million via its IPO to list on Main Market on 20 May 2026. CEO Datuk Fong Swee Kiang said the listing will elevate SkyeChip's position as a regional IC design player focused on high-performance computing and AI within the semiconductor industry. Of the proceeds, RM211.5 million, or 60.1%, will be channelled into R&D activities for proprietary silicon intellectual property. Applications for the retail offering opened on 29 April and close on 6 May 2026. SkyeChip is notable as one of the few Malaysian-listed IC design pure-plays, making its debut highly relevant to the country's broader semiconductor ambitions. (Source: [The Star](#))

CelcomDigi, Maxis and YTL each inject RM202 million into DNB to fund 5G spectrum costs

CelcomDigi Bhd / Maxis Bhd / YTL Power International Bhd | telecommunications • 29 Apr 2026

CelcomDigi, Maxis and YTL Communications each injected an additional RM202 million into Digital Nasional Berhad (DNB), at the request of the state-owned 5G wholesale network provider, according to Bursa Malaysia filings. With this latest injection, each of the three telcos' total shareholder advances to DNB now stand at RM551.9 million, representing an effective 22.94% interest based on DNB's issued share capital and shareholder advances. The additional funds will be utilised by DNB to pay upfront spectrum fees as part of the spectrum acceptance and to meet working capital requirements. The advances are interest-free, not repayable on demand, and carry voting rights equivalent to ordinary shares. Ministry of Finance Inc, which holds a 31.18% interest, did not participate in this latest round, having exercised its put option in December 2025. The injection reflects the three telcos' ongoing financial responsibility for DNB's operations as the government gradually exits its shareholding a structural shift that places the burden of sustaining Malaysia's first 5G wholesale network squarely on the private sector. (Source: [The Edge](#))

CORPORATE NEWS

Real updates, market consequences



IOI Properties poised to enter FBM KLCI, likely replacing Sime Darby in June review

IOI Properties Group Bhd | Property • 30 Apr 2026

Share price: Last close RM4.20 (04 May 2026); YTD: 59.10%

IOI Properties is poised for potential inclusion in the FBM KLCI in the upcoming June semi-annual review, following a sharp rise in its market capitalisation. The property developer's shares have surged nearly 88% since the last review cut-off on 24 November 2025, climbing to 24th place among eligible securities by market capitalisation as at 30 April. IOI Properties' entry would likely result in the removal of Sime Darby, currently the smallest FBM KLCI constituent by market capitalisation. The cut-off date for the June index review is 25 May 2026, with preliminary results announced on 3 June and changes taking effect on 22 June. (Source: [The Star](#))

CIMB Niaga posts 6.5% profit growth in 1QFY26, underpinned by fee-based income

PT Bank CIMB Niaga Tbk | Financial Services • 30 Apr 2026

CIMB Niaga, the 91.45%-owned Indonesian subsidiary of CIMB Group Holdings Bhd, reported a 6.5% year-on-year rise in net profit for the first quarter ended 31 March 2026, supported by higher fee-based income and stable operating performance. The bank posted a net profit of 1.73 trillion rupiah (RM394.59 million) for the quarter, up from 1.63 trillion rupiah (RM370.49 million) a year earlier. CIMB Niaga president director and CEO Lani Darmawan attributed the result to disciplined cost management and selective loan expansion. The result signals a steady start to 2026 for CIMB Group's key regional subsidiary, and will feed into CIMB Group's own 1Q2026 results when announced. (Source: [The Edge](#))

Australia's AirTrunk commits additional RM12 billion to Malaysia, total investment now RM27 billion

AirTrunk | Data Centre • 30 Apr 2026

AirTrunk confirmed it is investing RM12 billion to build two new hyperscale data centres in Iskandar Puteri, Johor, to be called JHB3 and JHB4. The new campuses will have a combined capacity of more than 280 megawatts, designed to support cloud and AI workloads, with recycled water used for cooling systems. This brings AirTrunk's total committed investment in Malaysia to RM27 billion, as confirmed by Prime Minister Dato' Seri Anwar Ibrahim following a courtesy visit by AirTrunk founder and CEO Robin Khuda. (Source: [The Edge](#))

Bursa Malaysia posts solid 1QFY26 results, PAT up 6.4% YoY

Bursa Malaysia Bhd | Financial Services • 30 Apr 2026

Share price: Last close RM8.65 (04 May 2026); YTD: +2.73%

For the first quarter ended 31 March 2026, Bursa Malaysia recorded a profit after tax, zakat and minority interest of RM72.8 million, representing a 6.4% year-on-year increase. Operating revenue grew 16.4% YoY to RM206.9 million, supported mainly by higher securities trading activity as well as increased listing and issuer fees. (Source: [BusinessToday](#))

WHAT'S NEXT?

Key Events Happening Soon



Upcoming Events

Upcoming Events	Details
SEMICON Southeast Asia 2026 Location: Kuala Lumpur Date: 5 – 7 May 2026 Industry: Semiconductor	i. One of the largest semiconductor industry exhibitions in Southeast Asia; ii. Brings together global chipmakers, suppliers, and investors; iii. Focus on AI, automation, and supply chain resilience in electronics manufacturing.
Malaysian Palm Oil Forum – China 2026 Location: Shanghai Date: 12 May 2026 Industry: Trade	i. High level forum connecting Malaysian exporters with Chinese buyers; ii. Focus on food, oleochemicals, and specialty fats market trends; iii. Strengthens Malaysia-China trade relations in palm oil sector.

Upcoming Listings

Company	Listing Date	Principal Advisor	IPO Price (RM)	PE Ratio	Offer for Sale	Public Issue	Private Placement
Gold Li Holdings Berhad	18 May (ACE)	M&A	0.13	10.0x	36,000,000	117,000,000	117,000,000
SkyeChip Berhad	20 May (MAIN)	Maybank IB	0.88	44.0x	-	400,000,000	-
EI Power Berhad	21 May (ACE)	M&A	0.48	17.37x	70,000,000	129,500,000	133,000,000

Estimated Upcoming Earnings Releases

Date	Company	Event Description	Latest Share Price & YTD %
07/05/2026	PAVREIT	Q1 FY2026	1.84 (+1.66%)
07/05/2026	HARTA	Q4 FY2026	1.14 (+15.15%)
08/05/2026	PENTA	Q1 FY2026	3.95 (+1.80%)
08/05/2026	SENTRAL	Q1 FY2026	0.705 (-11.32%)

Dividend Calendar

May04	May05	May06	May07	May08
MRCB RM0.01 SNS RM0.0025 COASTAL RM0.03	PTRANS RM0.0025 OXB RM0.005		AMEREIT RM0.0216 SDG RM0.1035 HPPHB RM0.005	FOODIE RM0.0032 OKA RM0.012
May09	May10	May11	May12	May13
		AFFIN RM0.0853 ATRIUM RM0.025 AMFIRST RM0.016	MAHSING RM0.05 KIPREIT RM0.0173 ZHULIAN RM0.005	IGBREIT RM0.04 IGBCR RM0.0133 AXREIT RM0.025

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5th May 2026, Tuesday

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