

## KLCI ENDS MARIGINALLY LOWER DESPITE THAT ROLLER COASTER RIDE

Trade war, tech-sell off and White House's personal woes dominated the headlines in March 2018. Though it is not really clear what's going on but we believe it is not over yet. More to come from Trump as he is trying hard to fulfill his promises. The huge swing in stocks were mainly influenced by external factors and less to do with local factors. Within the 22 days of trading, KLCI moves violently inside the 41 points gap.

15 stocks delivering positive returns led by NESTLE (21%), PPB (8%) and PBBANK (4%) while in the red corner, PMETAL (-26%), ASTRO (-17%) and TM (-11%) were on top of the ranking. In Bursa, total volume and value were up 14% and 4% respectively. SAPNRG and CIMB were among most traded stocks within the top 100.

Last week was a bit sluggish and the pause in stock trading comes on the heels of a busy week in Parliament that included an overhaul of electoral district or redelineation. The waiting game likely to continue this week as most investors are now looking forward for to hear from our Prime Minister on GE 14.

## CHART OF THE MONTH – LMAHDS03 Comdty Aluminum falls to lowest in Nov 2017 and broke 200d MA line.



The price of Aluminum on the London Metal Exchange fell almost 15% since January 2018 and this could add to the bearish pressure. Now, Major support seen at 2000.

## MONTHLY DATA CENTER

MAJOR INDEX	Beginning of month	End of month	Monthly Change (Pts)	Monthly Change (%)	YTD Change (%)
<b>Bursa Malaysia Index</b>					
FTSE Bursa Malaysia KLCI	1,856	1,863	7.23	0.39%	3.71
FTSE BM Hijrah Shariah	14,813	15,074	260.73	1.76%	3.75
FTSE Bursa Mal Top 100	12,923	12,853	(70.01)	-0.54%	1.89
FTSE Bursa Malaysia Emas	13,218	13,050	(168.41)	-1.27%	0.83
FTSE Malaysia Emasshari	13,428	13,244	(183.17)	-1.36%	(0.44)
FTSE Bursa Mal Mid 70 IX	16,115	15,619	(495.28)	-3.07%	(2.90)
FTSE Bursa Mal Small Cap	16,721	14,869	(1851.43)	-11.07%	(12.80)
<b>Bursa Malaysia Sector</b>					
Bursa Malaysia Finance	18,263	18,228	(35.13)	-0.19%	8.10
Bursa Malaysia Consumer	681	705	24.26	3.56%	9.03
Bursa Malaysia Plantation	7,991	8,001	9.91	0.12%	1.24
Bursa Malaysia Indusproduct	181	171	(9.39)	-5.19%	(1.92)
Bursa Malaysia Trad/Svc	235	230	(4.49)	-1.91%	(1.44)
Bursa Malaysia Industrial	3,228	3,238	9.66	0.30%	(1.31)
Bursa Malaysia Construction	301	284	(16.91)	-5.62%	(9.07)
Bursa Malaysia Property	1,183	1,085	(98.27)	-8.31%	(11.60)
Bursa Malaysia Technology	38	33	(5.87)	-15.30%	(22.36)
<b>Commodities</b>					
Brent Crude Futr	64	69	4.39	6.81%	3.43
WTI Crude Oil Futures	61	65	3.40	5.56%	6.85
Gold Spot \$/Oz	1,318	1,325	7.17	0.54%	1.74
Crude Palm Oil Future	2,559	2,427	(132.00)	-5.16%	(3.04)
<b>Currencies</b>					
USD-MYR X-Rate	3.917	3.864	(0.0533)	-1.36%	(4.52)
JPY-MYR X-Rate	3.672	3.639	(0.0329)	-0.90%	1.34

## FUND FLOW TRACKER

Foreign funds were net seller for the month of March amounted to -Rm71m while local funds were net buyer with Rm39m. On YTD basis, foreign funds were still positive with Rm2.3b of inflow.

### Disclosures and Disclaimers

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