

## FBMKLCI 1Wk Chg (1616.52, +12.05)

### Market Commentary

#### Highlights:

- KLCI rose 0.75% over the week, supported by hopes of an interest rate cut following weak U.S. job data.
- China, Hong Kong stocks end week higher, underpinned by expectations of renewed risk-on flows.
- Oil price hovers near a two-week high amid optimism of higher demand over the potential interest rate cut by the Federal Reserve.
- Wall Street closed higher on hopes of interest rate cut after weak U.S. job data.

#### Spotlight of the week

Malaysia's KLCI closed 0.75% higher over the week, tracking regional performance amid optimism for a potential interest rate cut by the Federal Reserve following weak U.S. job data.

Oil prices rose 2.61% over the week amid optimism for higher global demand as investors expect that the Federal Reserve may reduce interest rate in this week's FOMC meeting.

For the FKL1 this week, the market is expected to trade within a range, with an upside bias by expectations of an interest rate cut by the Federal Reserve.

#### Market Wrap Up

##### Regional Asia Index :

Both China and Hong Kong market rose over the week amid optimism over revived valuations, fresh listings and attractive entry points.

Nikkei rose 0.47% over the week but gains were capped by expectations of higher domestic interest rate with the benchmark Japanese government bond yields touched an 18-year peak on last Friday.

##### US & Europe Market :

U.S. stocks closed slightly higher on Friday amid expectations of interest rate cut by the Federal Reserve after weak economic data.

The three main indexes posted weekly gains. The S&P 500 rose 0.31%, the Nasdaq gained 0.91%, and the Dow climbed 0.50%.

European shares inched higher on Friday, led by the index of automakers and expectations of interest rate cut by the Federal Reserve amid weak U.S. job data and modest inflation figures.

Our View of The Week:

**Sideway**

8 December 2025

### Financial Insights

#### Indices

Regional Indices	Price	1wk Chg	%	High	Low
<b>FBM KLCI</b>	1616.52	12.05	0.75%	1634.35	1608.26
<b>Nikkei 225</b>	50491.87	237.96	0.47%	51028.42	49215.96
<b>Straits Times Index</b>	4531.36	7.40	0.16%	4561.21	4511.88
<b>Hang Seng</b>	26085.08	226.19	0.87%	26264.13	25649.3
<b>S&amp;P / ASX 200</b>	8634.582	20.51	0.24%	8634.6	8563.2
<b>Shanghai Comp</b>	3902.808	14.21	0.37%	3914.464	3859.049

US & Europe Indices	Price	1wk Chg	%	High	Low
<b>DJI</b>	47954.99	238.57	0.50%	48133.54	47263.92
<b>S&amp;P 500</b>	6870.40	21.31	0.31%	6895.78	6799.94
<b>NASDAQ Comp.</b>	23578.13	212.44	0.91%	23680.03	23110.21
<b>STOXX Europe 600</b>	578.77	2.34	0.41%	581.42	572.71
<b>DAX</b>	24028.14	191.35	0.80%	24130.92	23433.48

#### Commodities

Instrument	Price	1wk Chg	%	High	Low
<b>COMEX Gold</b>	4243	-11.9	-0.28%	4299.6	4194
<b>WTI Crude</b>	60.08	1.53	2.61%	60.5	58.28
<b>Crude Palm Oil</b>	4152	38	0.92%	4193	4062

Currency	Last	Change	%	High	Low
<b>USDMYR</b>	4.1122	-0.02	-0.49%	4.1363	4.1027

#### 2 years FBM KLCI Daily Chart



Source: Bloomberg/ Phillip Capital

FKLI Spot Month Daily Candle Chart



Source: TradingView

Technical Comments (FKLI Spot Month)

Based on the daily chart, the FKLI is likely to trade within a range of 1590 to 1640 this week.



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