Financials Weekly

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FBMKLCI 1WK Chg (1556.0, +1.77%)

Our View of The Week: **Bullish**

11 August 2025

Market Commentary

Highlights:

- KLCI Ends Up 0.5%, Hits 12-Week High; Plantation Gains On Firm Prices
- China stocks end week near 10-month high on strong data
- Oil holds steady on reports of US-Russia deal
- S&P 500 rises, Nasdaq closes at record Friday as Apple shares rally

Spotlight of the week

Malaysia's benchmark KLCI ended 0.5% higher at 1556.98, its highest level in 12 weeks, led by gains in plantation and construction stocks.

On Friday, the FTSE Bursa Malaysia KLCI (FBM KLCI) rose 7.87 points or 0.51 per cent to close at 1,556.98 from Thursday's close of 1,549.11.

China stocks closed slightly down on Friday, but ended the week near their highest level in 10 months, as upbeat economic data lifted sentiment and investors largely looked past U.S. tariff concerns. Hong Kong shares declined on the day. China's blue-chip CSI300 Index ended 0.2% lower, while the Shanghai Composite Index was down 0.1%. Hong Kong benchmark Hang Seng slipped 0.9%.

Oil largely held steady on Friday as markets awaited a meeting in coming days between Russian president Vladimir Putin and his U.S. counterpart Donald Trump, but prices marked their steepest weekly losses since late June on a tariff-hit economic outlook.Brent crude futures settled 16 cents, or 0.2%, higher at $66.59 a barrel, while U.S. West Texas Intermediate crude futures were unchanged at $63.88.

This week, FKLI will likely to trade in consolidation due to key economic data release & key meeting between Trump and Putin, with upward bias, gaining strength from retail funds inflow.

Market Wrap Up

Regional Asia Index :

Asia-Pacific markets ended the day mostly lower on the last day of the week.

Hong Kong's Hang Seng Index declined 0.89% to close at 24,858.82, while mainland China's CSI 300 index decreased by 0.24% to 4,104.97.

Japan's Nikkei 225 benchmark ended the day 1.85% higher at 41,820.48, while the broader Topix index added 1.21% to 3,024.21.

The Nikkei 225 in Tokyo rose 2.2% but later trimmed some of its gains, adding 1.9% to 41,820.48. Toyota Motor Corp. jumped 3.5% and Honda Motor Co. was up 4%. Automakers are among the manufacturers with the most at stake regarding exports to the U.S.

US & Europe Market :

U.S. stocks ended higher and Nasdaq scored a record closing high for the second straight day on Friday as technology-related shares, including Apple, gained amid optimism about expectations for rate cuts this year.

The S&P 500 .SPX gained 49.75 points, or 0.78%, to end at 6,389.75 points, while the Nasdaq Composite gained 208.72 points, or 0.98%, to 21,451.42. The Dow Jones Industrial Average rose 219.69 points, or 0.50%, to 44,188.33.

The major averages posted a winning week, with the 30-stock Dow jumping about 1.4% and the broad market S&P 500 up 2.4% in the period. The Nasdaq posted a 3.9% climb on the week.

European shares posted their biggest weekly gain in twelve weeks on Friday, as banking stocks continued to drive the benchmark index upwards, while investors watched for signs of a potential Russia-Ukraine ceasefire. The pan-European STOXX 600 index rose 0.2% on the day, taking its weekly gains to 2.2%.

Financial Insights

Indices

Regional Indices	Price	1wk Chg	%	High	Low
FBM KLCI	1556.98	23.63	1.54%	1556.98	1522.96
Nikkei 225	41820.48	1020.88	2.50%	42033.92	39850.52
Straits Times Index	4239.83	86.00	2.07%	4265.44	4144.89
Hang Seng	24858.82	351.01	1.43%	25115.16	24372.51
S&P / ASX 200	8807.116	145.07	1.67%	8848.8	8630.9
Shanghai Comp	3635.128	75.18	2.11%	3645.367	3547.163

US & Europe Indices	Price	1wk Chg	%	High	Low
DJI	44175.61	587.03	1.35%	44498.43	43724.02
S&P 500	6389.45	151.44	2.43%	6395.16	6271.71
NASDAQ Comp.	21450.02	799.89	3.87%	21464.53	20833.86
STOXX Europe 600	547.08	11.29	2.11%	548.23	535.97
DAX	24162.86	736.89	3.15%	24392.04	23521.61

Commodities

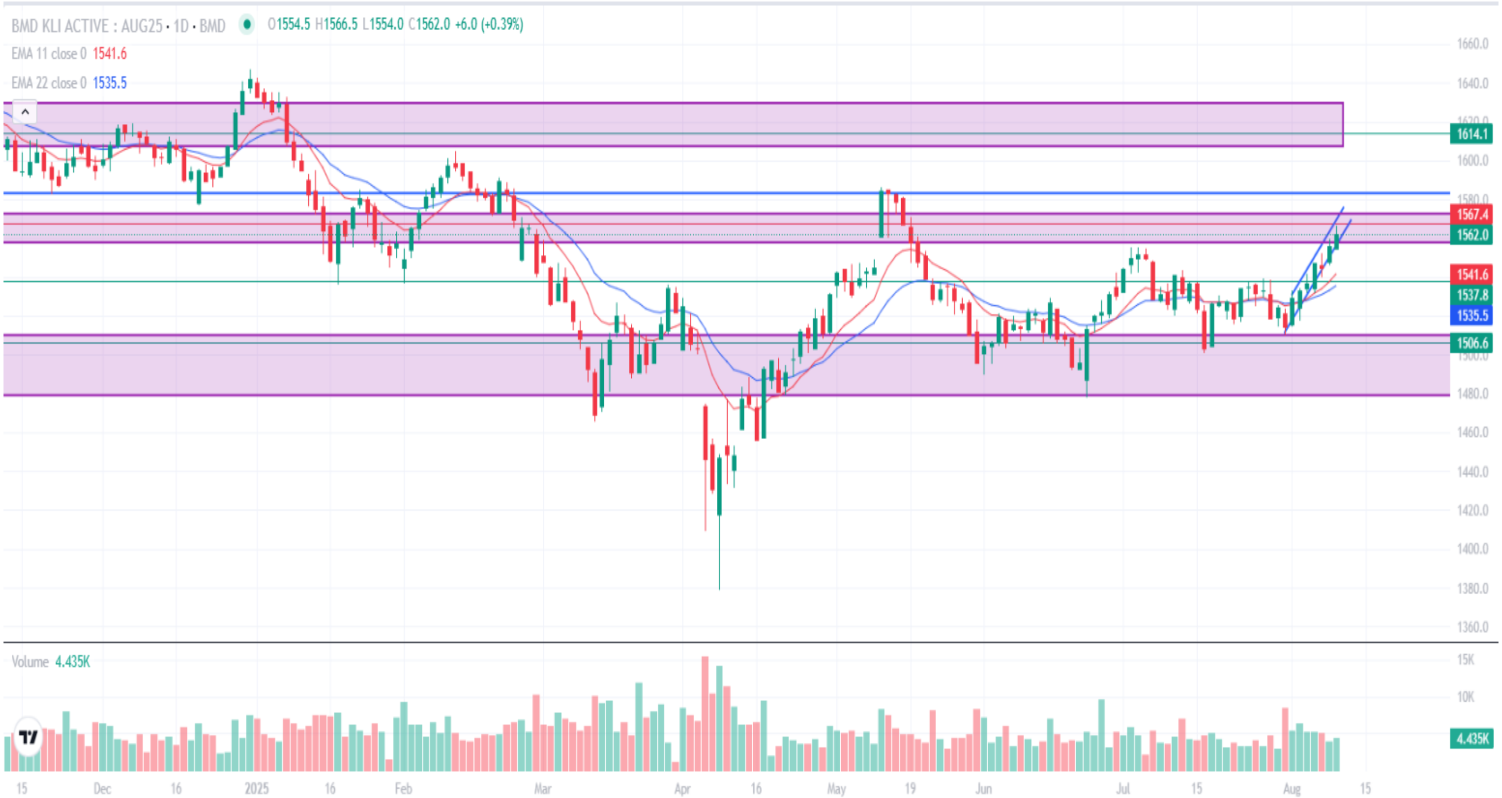
Instrument	Price	1wk Chg	%	High	Low
COMEX Gold	3491.3	91.5	2.69%	3534.1	3397.9
WTI Crude	63.88	-3.45	-5.12%	67.74	62.77
Crude Palm Oil	4255	10	0.24%	4304	4159

Currency	Last	Change	%	High	Low
USDMYR	4.2450	-0.03	-0.78%	4.2517	4.2210

2 years FBM KLCI Daily Chart

Source: Bloomberg/ Phillip Capital

FKLI Spot Month Daily Candle Chart



Source: TradingView/ Phillip Capital

Technical Comments (FKLI Spot Month)

The FBM KLCI has maintained strong bullish momentum after breaking and closing above the 1,538 resistance level, with price action holding within an upward trend channel and now testing a key resistance zone. For traders eyeing long positions, it is advisable to wait for a decisive breakout above 1,567 with confluence and strong volume before entering, targeting 1,580–1,583 for profit-taking. Meanwhile, traders considering short positions should closely monitor the current resistance zone and watch for a candle close below the zone and trendline with confirming volume, aiming for profit-taking at the 1,541–1,537 levels. Patience and confirmation remain essential to avoid false breakouts.

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