

FBMKLCI 1Wk Chg (1527.7, -1.68)

Market Commentary

Highlights:

- KLCI Ends Up 1.3%, Outperforms Asia; US Futures Slide Before Jobs Data
- China, HK stocks book steepest weekly losses since April on soft data, Trump tariffs
- Oil falls \$2 a barrel on worries about OPEC+ supply, US jobs data
- Stocks slump on latest tariffs, soft jobs data

Spotlight of the week

Malaysia's benchmark KLCI jumped 1.3% to end at 1533.35, its highest level since May 14, amid upbeat sentiment after U.S. lowered tariffs on Malaysia to 19% from 25%.

At 5 pm, the FTSE Bursa Malaysia KLCI (FBM KLCI) inched up 20.10 of a point, or 1.30 per cent, to close at 1533.35 from Thursday's close of 1,513.25.

Oil prices \$2 a barrel on Friday because of jitters about a possible increase in production by OPEC and its allies, while a weaker-than-expected U.S. jobs report fed worries about demand.

This week, it's expected that FKLI will trade within a range with downside bias tracking the loss in US market last week.

Market Wrap Up

Regional Asia Index :

Tokyo stocks ended mixed on Friday, as selling of heavyweight semiconductor issues was offset by buying of exporter issues on the yen's depreciation. Japan's benchmark Nikkei stock index, the 225-issue Nikkei Stock Average, ended down 270.22 points, or 0.66 percent, from Thursday at 40,799.60.

Mainland China and Hong Kong stocks extended their declines on Friday, posting their steepest weekly losses since April, weighed down by soft domestic economic data and worries over global trade following U.S. President Donald Trump's new tariffs.

US & Europe Market :

U.S. stocks slumped on Friday, with the S&P on track for its biggest daily percentage decline in more than three months as new U.S. tariffs on dozens of trading partners and a surprisingly weak jobs report spurred selling pressure.

The S&P 500 .SPX lost 101.60 points, or 1.60%, to end at 6,237.79 points, while the Nasdaq Composite .IXIC lost 472.78 points, or 2.24%, to 20,649.67. The Dow Jones Industrial Average .DJI fell 543.97 points, or 1.23%, to 43,587.01.

European stocks logged their biggest one-day drop in over three months on Friday, at the end of a busy week as investors grappled with the repercussions of fresh U.S. levies on dozens of countries, including a 39% tariff on Switzerland.

Our View of The Week:

Range Bound
4 August 2025

Financial Insights

Indices

Regional Indices	Price	1wk Chg	%	High	Low
FBM KLCI	1527.70	-1.68	-0.11%	1534.48	1513.25
Nikkei 225	40290.7	-707.57	-1.73%	41151.25	39850.52
Straits Times Index	4187.34	-53.80	-1.27%	4205.99	4144.89
Hang Seng	24704.13	-858.00	-3.36%	25000.06	24372.51
S&P / ASX 200	8663.7	-34.01	-0.39%	8756.4	8630.9
Shanghai Comp	3580.202	-17.73	-0.49%	3606.375	3547.163

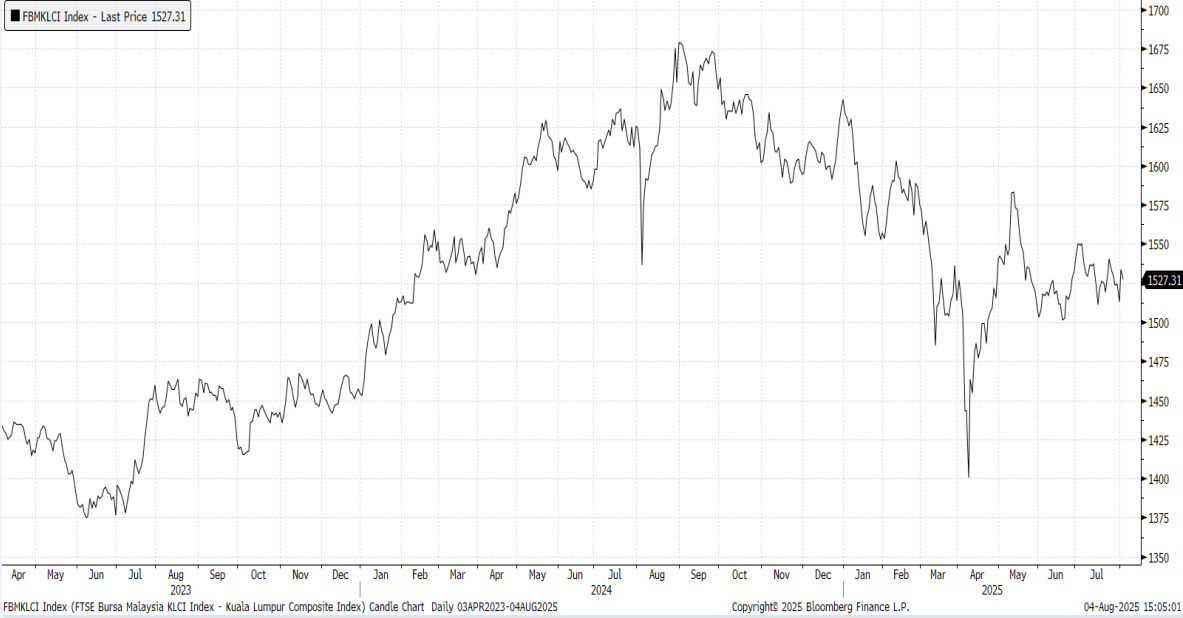
US & Europe Indices	Price	1wk Chg	%	High	Low
DJI	43588.58	-1248.98	-2.79%	44665.82	43340.68
S&P 500	6238.01	-151.76	-2.38%	6427.02	6212.69
NASDAQ Comp.	20650.13	-528.45	-2.50%	21457.48	20560.17
STOXX Europe 600	535.79	-12.97	-2.36%	552.95	534.23
DAX	23425.97	-544.39	-2.27%	24433.4	23380.94

Commodities

Instrument	Price	1wk Chg	%	High	Low
COMEX Gold	3414.5	47.7	1.42%	3423.9	3324.4
WTI Crude	67.57	0.86	1.29%	70.41	66.56
Crude Palm Oil	4188	-54	-1.27%	4274	4159

Currency	Last	Change	%	High	Low
USDMYR	4.2350	0.00	0.09%	4.286	4.2345

2 years FBM KLCI Daily Chart



Source: Bloomberg/ Phillip Capital

FKLI Spot Month Daily Candle Chart



Source: Bloomberg/ Phillip Capital

Technical Comments (FKLI Spot Month)

Based on the daily chart, FKLI seems to fluctuate within 1500-1530 level.



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