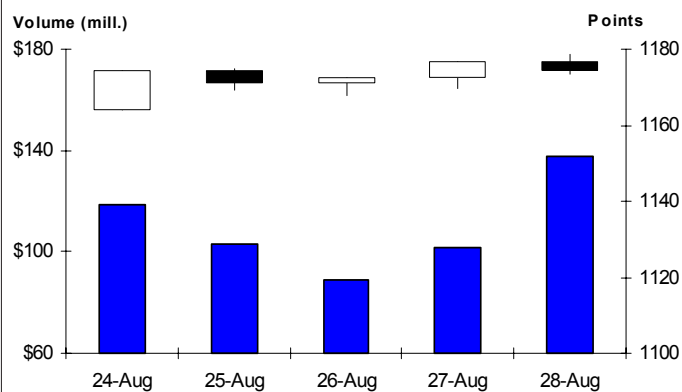


WEEKLY CLOSING IN MAJOR MARKET INDICES

	21-Aug	28-Aug	%wow	%ytd
KL Composite	1163.79	1174.27	33.9	32.7
Dow Jones	9505.96	9544.2	8.7	8.3
Nikkei 225	10238.2	10534.14	18.9	15.6
DAX Index	5462.74	5517.35	14.7	13.6
UK FTSE100	4850.89	4908.9	10.7	9.4
AUS ORD 30	4305.7	4495.9	22.9	17.7
STI Index	2544.86	2642.8	50.0	44.5
Hang Seng	20199.02	20098.62	39.7	40.4
SSE Index	2960.771	2860.688	57.1	62.6

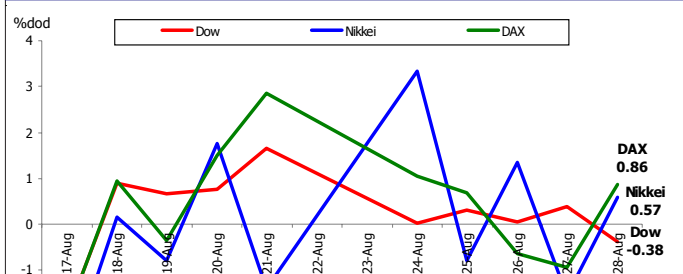
Source: Bloomberg, Bursa Malaysia

KLCI DAILY PERFORMANCE



Source: Bloomberg, Bursa Malaysia

MAJOR STOCK INDICES (DAILY % CHANGE)

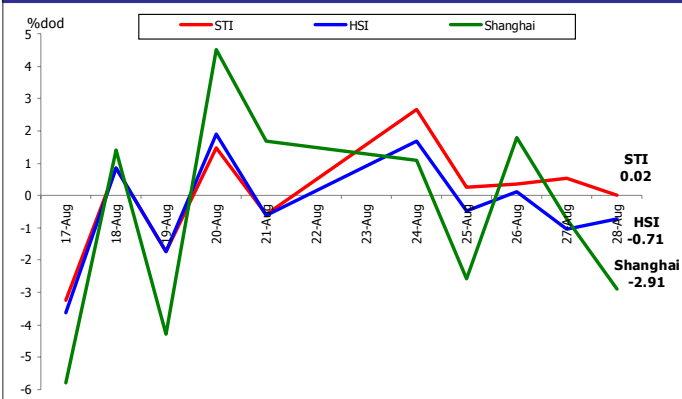


Source: Bloomberg, Bursa Malaysia

STOCK MARKET HIGHLIGHTS

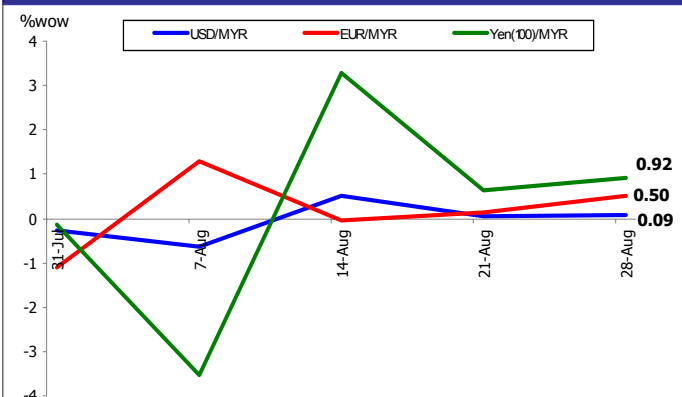
- U.S. stocks rose for a second week as better than estimated consumer confidence, housing data and technology companies earnings suggested that the recession is ending.** Stocks fell on Friday, led by companies whose earnings benefit least from economic growth. Boeing Co. rallied the most in the Dow Jones Industrial Average this week after saying the 787 Dreamliner will fly this year. Intel Corp. gained after increasing its forecast. Utilities, consumer goods sellers and health-care companies accounted for three of the five steepest drops among the 10 groups in the Standard & Poor's 500 Index.
- U.K. stocks climbed, completing the second straight month of gains, on speculation an economic recovery will fuel earnings growth.** Kazakhmys Plc and Xstrata Plc led mining stocks higher as metals prices increased. The FTSE 100 has rebounded 40% from its March lows, leaving the measure trading at about 71 times the earnings of its member companies, the highest ratio since 2002, according to weekly Bloomberg data. Banks also paced the advance, with the FTSE 350 Banks Index rising 2.2%, its best performance for the month.
- The DAX Index rose after a report showed home prices in 20 U.S. cities fell in June at a slower pace than forecast and confidence among U.S. consumers climbed more than economists had anticipated.** Siemens AG rose 3.5% as Bank of America Corp. recommended buying the shares. TUI AG, the German owner of Europe's largest travel company, jumped 10%. ThyssenKrupp AG and Salzgitter AG, Germany's largest steelmakers, declined at least 1.9% as JPMorgan Chase & Co. cuts its recommendation on European metals.
- Japan's main indexes had their steepest weekly advance this month after stocks rose on the last trading day before the election where newspaper polls suggested results in the ruling party being ousted.** Inpex Corp., Japan's largest oil explorer, advanced 1.9% following the first increase in U.S. oil prices in three days. Mitsui O.S.K. Lines Ltd., which operates oil tankers, added 2.6%. Casio Computer Co., the maker of the world's first waterproof mobile phone, soared 8.5% on a newspaper report it may merge its handset business with that of NEC Corp.

REGIONAL STOCK INDICES (DAILY % CHANGE)



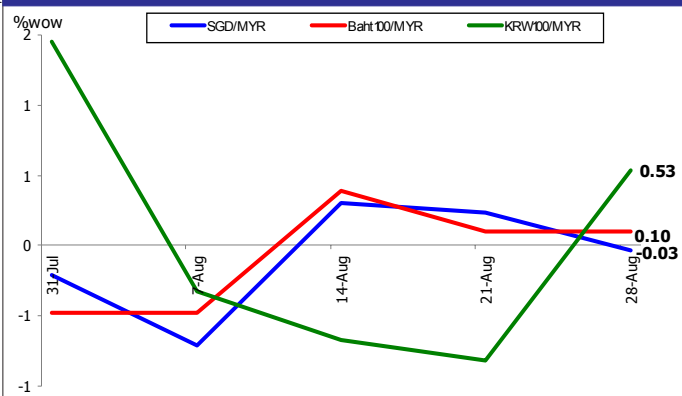
Source: Bloomberg, Bursa Malaysia

RINGGIT vs MAJOR CURRENCIES (WEEKLY % CHANGE)



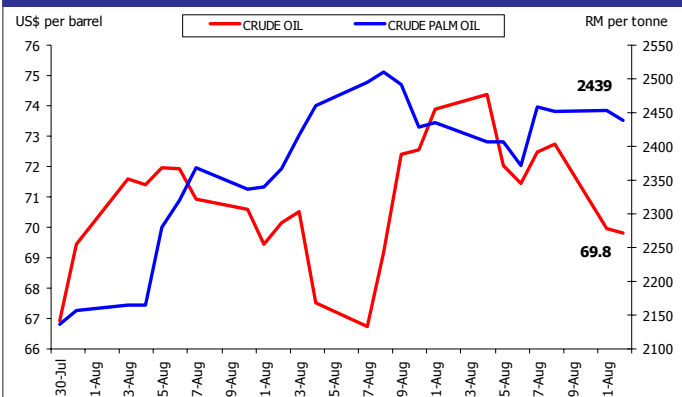
Source: Bloomberg, Bursa Malaysia

RINGGIT vs REGIONAL CURRENCIES (WEEKLY % CHANGE)



Source: Bloomberg, Bursa Malaysia

CRUDE OIL vs CRUDE PALM OIL



Source: Bloomberg, Bursa Malaysia

- China's stocks fell, with the Shanghai Composite Index completing a fourth weekly decline, on concern government measures to curb lending and production in industries including steel and cement will slow economic growth.** Bank of China Ltd. dropped 1.8% after saying it plans to slow credit growth in the second half. China Cosco Holdings Co. declined 4.7% after swinging to a first-half loss. China Petroleum & Chemical Corp. and PetroChina Co., the nation's two biggest refiners, retreated at least 2% on speculation the government will delay fuel-price increases.
- Malaysia stock market rebounded from last week's decline, posting a 0.9% gain following positive earnings performance by some blue chips while an increase in commodity prices pushed plantation and oil and gas companies higher.** Malaysian Airline System Bhd. was the best performer last week, after company named Tengku Azmil Zahrudin as the new chief executive officer to replace Idris Jala, who has been appointed as a government minister. The airline also said earlier that expects to return to operating profit next year as passenger and cargo demand begin to pick up in the second half. Leading the banks was RHB Capital Bhd., which posted a 2.6% gain, following an 11% increase of its second quarter profit mainly due to income from Islamic banking while interest expenses declined. On the same theme, Parkson Holdings Bhd. rose 2.1% after the company said fiscal fourth-quarter profit jumped almost sixfold.

ECONOMIC HIGHLIGHTS

- US consumer confidence increased in August** as consumers became less worried about the outlook for the labor market. The Conference Board's confidence index rose to 54.1, the first gain in three months, from 47.4 in July. The figure reached a record low of 25.3 in February.
- US home prices fell in June at a slower pace than forecast,** signaling the real-estate crisis that triggered the worst recession since the 1930s is dissipating. The S&P/Case-Shiller home-price index declined 15.4% from a year earlier, the smallest drop since April 2008. The gauge rose from the prior month by the most in four years. From a month earlier, home prices climbed 1.4% in June, the second consecutive gain and the biggest since June 2005.
- US durable goods orders jumped in July** by the most in two years, stocked by a surge in demand for aircraft and communications equipment. Bookings for durable goods climbed 4.9% from a 2.2% decline in June, the most since July 2007.

- **US new home sales jumped in July**, adding to signs that the economy is rebounding from the worst recession since the 1930s. Sales increased 9.6%, the most since February 2005, to a 433,000 annual pace.
- **The US economy took a first step toward recovering from the worst recession since the 1930s in the second quarter as companies reduced inventories, spending started to climb and profits grew.** Gross domestic product shrank at a 1.0% annual rate from April to June. The reading matched the government's initial calculation issued last month and followed a 6.4% pace of contraction in 1Q09. Corporate profits, not included in the advance GDP estimate released in July, rose 5.7% from the first three months of the year, the biggest increase since 1Q05. The drop in GDP was the fourth in a row, the longest contraction since quarterly records began in 1947. The US economy has shrunk 3.9% since last year's 2Q, making this the deepest recession since the Great Depression.
- **US consumer spending rose in July as households took advantage of the government's 'cash for clunkers' program to buy new cars.** The 0.2% m-o-m gain in purchases was in line with forecasts and followed a 0.6% increase in June. Incomes were unchanged, causing the savings rate to decrease.
- **Eurozone industrial orders increased in June**, the latest indication that the worst recession in six decades is easing. Orders to industrial companies in the euro region rose 3.1% from May, the biggest gain in 19 months. From a year earlier, June orders fell 25.1%.
- **Eurozone loan growth grew at the slowest pace on record in July**, suggesting the economy may struggle to recover from its worst recession since World War II. Loans to the private sector rose 0.6% from a year earlier, the slowest growth since records began in 1991, after increasing an annual 1.5% in June. On the month, loans fell 0.4%, the biggest decline ever recorded. M3 money-supply growth, which the ECB uses as a gauge of future inflation, slowed to 3.0% in July from 3.6% in June. That's the slowest since July 1995.
- **Eurozone business and consumer confidence improved for the fifth straight month in August**, with sentiment among service providers surging on a pickup in activity. The overall Economic Sentiment Indicator for the euro zone rose sharply to a 10-month high of 80.6 from 76.0 in July.
- **Japan's exports fell for a tenth straight month in July** as demand from all of the nation's major markets deteriorated. Exports tumbled 36.5% from a year earlier, steeper than June's 35.7% drop.
- **Japan's corporate service prices fell at a record pace in July** as companies trim spending, adding to evidence deflation may again be taking root in the world's second-largest economy and hamper its recovery. The prices businesses pay for services such as transportation and advertisements dropped 3.4% from a year earlier. The decline, the tenth in a row, was the biggest since the central bank began compiling the figures in January 1985. Corporate service prices fell 0.2% in July from June.
- **Japan's unemployment rate rose to a record 5.7% in July**, dealing a blow to Prime Minister Taro Aso on the eve of an election that polls indicate his ruling Liberal Democratic Party will lose. The jobless rate rose more than forecast, surpassing the previous record 5.5% in April 2003.
- **Japan's consumer prices fell at a record pace in July**, adding to signs that deflation will hamper a rebound from the nation's worst postwar recession. Consumer prices excluding fresh food declined 2.2% from a year earlier after dropping 1.7% in the previous month. It was the sharpest decrease since the survey began in 1971. Excluding food and energy, consumer prices fell 0.9% in July, the fastest pace in seven years.
- **Malaysia's central bank kept interest rates unchanged for a fourth straight meeting on August 26** amid signs the economy is stabilizing after sliding into recession last quarter. Bank Negara Malaysia maintained its overnight policy rate at 2.00%. The rate is at the lowest level since it was introduced in April 2004.
- **Malaysia's economy contracted for a second quarter**, even as the central bank predicts a recovery by the end of the year. The economy shrank 3.9% in 2Q09 from a year earlier, after a 6.2% contraction in 1Q09. The manufacturing industry shrank 14.5% in the second quarter from a year earlier and exports of goods and services dropped 17.3%. Investment as measured by gross fixed capital formation declined 9.8% last quarter while private consumption increased 0.5%.
- **Malaysia's demand for financing continued to improve as gross financing via the banking system and capital market rose to RM64.2 billion in July** from RM60.7 billion in June due to higher loan disbursements. Banking system loans and private debt securities (PDS) outstanding, on a net basis, rose at a higher combined annual rate of 8.3% as at end July versus 8.0% in June.

UPCOMING RELEASE (1 -4 SEPT. 2009)

US

- August ISM Manufacturing by Institute for Supply Management on September 1, 2009.
- July Construction Spending by US Census Bureau on September 1, 2009.
- July Pending Home Sales by National Associate of Realtors on September 1, 2009.
- August ISM Non-Manufacturing Business Activity Index by Institute for Supply Management on September 3, 2009.
- August Unemployment Rate by Bureau of Labor Statistics on September 4, 2009.

Eurozone

- August Consumer Price Index Estimate by Eurostat on August 31, 2009.
- August Composite PMI Output by NTC Research on September 3, 2009.
- July Unemployment Rate by Eurostat on September 1, 2009.
- July Producer Price Index (PPI) by Eurostat on September 2, 2009.
- 2Q 2009 Gross Domestic Product update by Eurostat on September 2, 2009.
- July Retail Sales and Volume by Eurostat on September 3, 2009.
- Announcement of Euro Interest Rates by European Central Bank (ECB) on September 3, 2009.

Japan

- July Industrial Production Index (IPI) by Ministry of Economy, Trade and Industry on August 31, 2009.
- July Retail Trade by Ministry of Economy, Trade and Industry on August 31, 2009.
- July Housing Starts by Ministry of Land Infrastructure & Transport on August 31, 2009.
- July Construction Orders by Ministry of Land Infrastructure & Transport on August 31, 2009.
- August Monetary Base Average Outstanding by Bank of Japan on September 2, 2009.
- 2Q 2009 Capital Investment/Spending by Ministry of Finance on September 4, 2009.