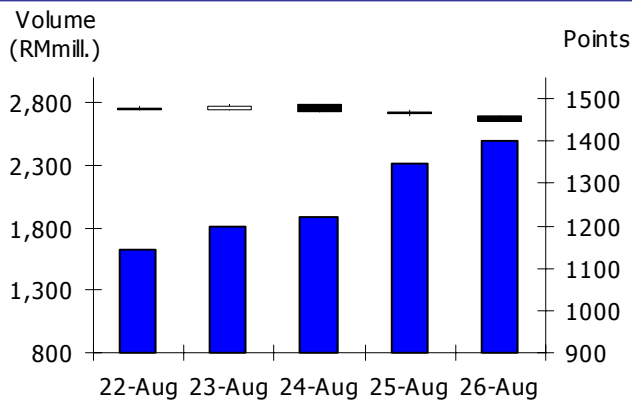


WEEKLY CLOSING IN MAJOR MARKET INDICES

	19-Aug	26-Aug	%wow	%ytd
KL Composite	1,483.98	1,444.81	-2.6	-4.9
Dow Jones	10,817.65	11,284.54	4.3	-2.5
Nikkei 225	8,719.24	8,797.78	0.9	-14.0
DAX Index	5,480.00	5,537.48	1.0	-19.9
UK FTSE100	5,040.76	5,129.92	1.8	-13.1
AUS ORD 30	4,171.90	4,271.00	2.4	-11.9
STI Index	2,733.63	2,748.18	0.5	-13.9
Hang Seng	19,399.92	19,582.88	0.9	-15.0
SSE Index	2,534.36	2,612.19	3.1	-7.0

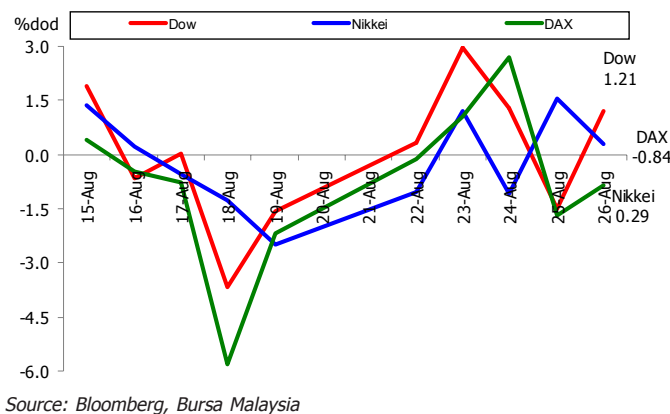
Source: Bloomberg, Bursa Malaysia

KLCI DAILY PERFORMANCE



Source: Bloomberg, Bursa Malaysia

MAJOR STOCK INDICES (DAILY % CHANGE)

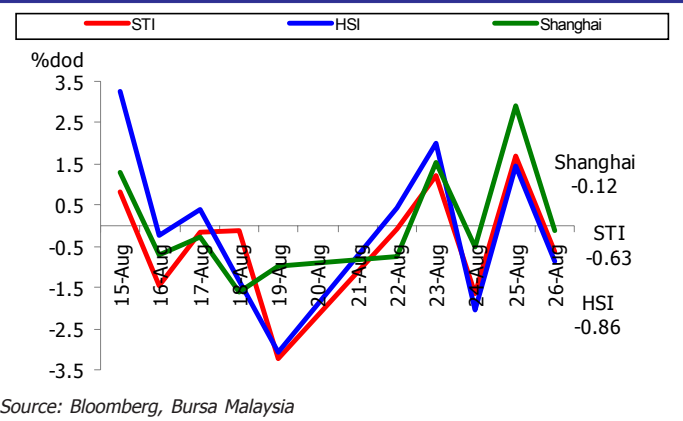


Source: Bloomberg, Bursa Malaysia

STOCK MARKET HIGHLIGHTS

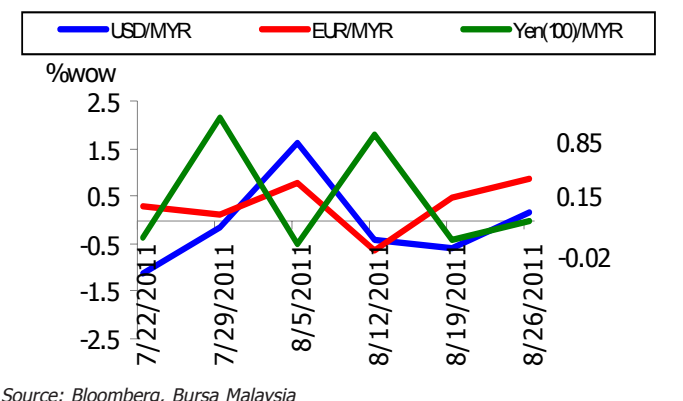
- U.S. stocks rose at the close of trading, as measured by the Standard & Poor's 500 Index, at 4:10 p.m. New York time. The S&P 500 rose 1.5% to 1,176.80. There were 466 stocks that rose and 32 that fell. Apple Inc., up 2.6% to 64.28, led the gain. The Dow Jones Industrial Average rose 1.2% to 11,284.54. For the year, the S&P 500 has lost 6.4%. The Dow has dropped 2.5%. Bank of America Corp. was the most-active U.S. stock. Trading totaled 421.1 million shares. Other actively traded shares included Microsoft Corp., Sprint Nextel Corp., Sirius XM Radio Inc., and General Electric Co. Apple Inc. contributed the most to the S&P 500's gain, lifting its value by 1.00 point, followed by Microsoft Corp. at 0.55 point and International Business Machines Corp. at 0.47 point. Wells Fargo & Co. limited the index's gain the most, reducing its value by 0.10 point, followed by Johnson & Johnson at 0.08 point and Hewlett-Packard Co. at 0.05 point.
- U.K. stocks closed little changed, with the FTSE 100 Index completing the biggest weekly gain in almost two months, as Federal Reserve Chairman Ben S. Bernanke said he has tools to stimulate the economy without signaling when or whether he might deploy them. Lloyds Banking Group Plc led banks lower, sliding 4.1%. Admiral Group Plc and Burberry Group Plc gained as analysts advised buying the shares. Amec Plc, Resolution Ltd. and G4S Plc fell after analyst downgrades. The FTSE 100 retreated 1.18, or less than 0.1%, to 5,129.92 at the 4:30 p.m. close in London, after earlier losing as much as 2.3%. The gauge gained 1.8% this week, the most since July 1. The broader FTSE All-Share Index also declined less than 0.1% today and Ireland's ISEQ Index slipped 0.8%.
- Japanese stocks snapped a four-week losing streak as investors bet the yen will weaken from near record highs amid speculation U.S. Federal Reserve Chairman Ben S. Bernanke won't unveil new measures to prop up the world's largest economy in a speech today. The Nikkei 225 rose 0.3% to 8,797.78 at the 3 p.m. close after swinging between gains and losses more than 10 times. For the week, the Nikkei advanced 0.9%. The yen slipped 0.6% against the dollar, boosting the earnings outlook for exporters.
- China's stocks fell, narrowing the first weekly advance in six weeks, after the nation's biggest oil and shipping companies reported slumping profit and concern intensified the central bank won't ease monetary policies. China Vanke Co. and Industrial & Commercial Bank of China Ltd. led declines by financial companies after Xinhua News Agency said inflation will remain high and the government will maintain property curbs. PetroChina Co. dropped the most in a week as second-quarter profit declined 12% because the company wasn't able to pass on higher costs to consumers. The Shanghai Composite Index, which tracks the bigger of China's stock exchanges, lost 3.1 points, or 0.1%, to 2,612.19 at the 3 p.m. close. The CSI 300 Index declined 0.1% to 2,901.22, led by energy and financial companies.
- Hong Kong's Hang Seng Index pared its first weekly advance in five weeks as concern about the global economic recovery intensified

REGIONAL STOCK INDICES (DAILY % CHANGE)



ahead of a speech by Federal Reserve Chairman Ben S. Bernanke, overshadowing gains by Industrial & Commercial Bank of China Ltd. on higher profit. HSBC Holdings Plc, Europe's largest lender by market value, slid 1.3%. Li & Fung Ltd., a supplier of toys and clothes to Wal-Mart Stores Inc., dropped 1.2%. PetroChina Co., Asia's biggest company by market value, fell 3.6% after its profit missed analysts' estimates. Industrial & Commercial Bank of China Ltd., the world's No. 1 lender by market capitalization, gained 1.4% after reporting first-half profit jumped 29%. The Hang Seng Index fell 0.9% to 19,582.88 as of the close of trading after earlier climbing as much as 0.9%. About three shares fell for each that rose on the 46-member gauge, which gained 0.9% this week, snapping four straight weeks of decline. The Hang Seng China Enterprises Index of Chinese companies listed in Hong Kong dropped 1.3% to 10,299.58, swinging between a drop and increase of 1.5%.

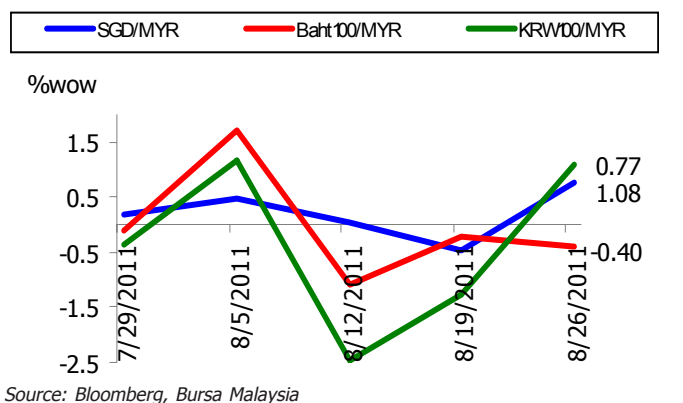
RINGGIT vs MAJOR CURRENCIES (WEEKLY % CHANGE)



- The FBM KLCI slumped 39.17 points, or 2.64% last week to 1,444.81, with CIMB (-89 sen) alone contributing nearly 40% to the index's fall, while together with Axiata (-28 sen), Tenaga (-31 sen) and Petronas Chemical (-37 sen) represent almost three-quarters of the loss. Average daily traded volume and value declined further to 884.5 million shares and RM1.92 billion respectively, compared with the 1.01 billion shares and RM1.78 billion average the previous week.

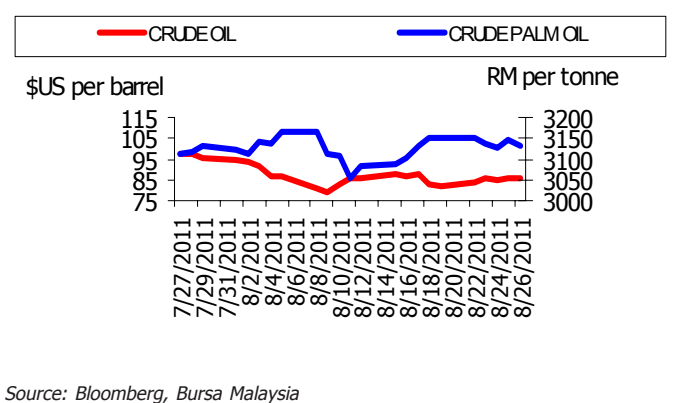
ECONOMIC HIGHLIGHTS

RINGGIT vs REGIONAL CURRENCIES (WEEKLY % CHANGE)



- U.S.: Pickup in industrial output buoyed U.S. in July, Chicago fed's gauge shows.** A pickup in industrial production helped keep the U.S. economy from weakening further in July, according to a Federal Reserve Bank of Chicago gauge. The Chicago Fed national index, a weighted average of 85 economic indicators, improved to minus 0.06 in July from minus 0.38 a month earlier. The three-month average increased to minus 0.29 from June's minus 0.54. Readings less than zero indicate "below-trend" growth in the national economy, and the gauge has been negative for four straight months. (Bloomberg)
- U.S.: New-home sales in U.S. declined in July to the lowest level in five months.** Sales of new U.S. homes declined more than projected in July to the lowest level in five months, indicating the industry is struggling to stabilize two years into the economic recovery. Purchases fell 0.7% to a 298,000 annual pace after a 300,000 rate in June that was slower than previously estimated, figures from the Commerce Department showed today in Washington. The median projection in a Bloomberg news survey of economists called for a 310,000 rate in July. (Bloomberg)

CRUDE OIL vs CRUDE PALM OIL



- U.S.: Consumer confidence stabilizes near record low, Bloomberg Index shows.** Consumer confidence stabilized last week at a level that's within striking distance of an all-time low as Americans remained pessimistic about the economy. The Bloomberg Consumer Comfort Index was minus 47 in the week to Aug. 21 compared with minus 48.3 reading the previous period that halted a three-week slide. The gain was within the survey's 3-point margin of error. The figure is close to minus 54 in January 2009, which matched the worst reading in the history of the series dating back to 1985. (Bloomberg)
- U.S.: First-time jobless claims in U.S. increase, propelled by Verizon Dispute.** Claims for U.S. unemployment benefits unexpectedly rose last week, pushed up for a second time by a labor dispute at Verizon Communications Inc. (VZ) Jobless claims

climbed by 5,000 to 417,000 in the week ended Aug. 20, Labor Department figures showed in Washington. Economists surveyed by Bloomberg News projected a drop in claims to 405,000, according to the median forecast. At least 8,500 applications were filed by workers at Verizon last week, compared with 12,500 the prior week, the agency said. *(Bloomberg)*

- **U.S.: Orders for durable goods in U.S. increase 4%, twice as much as estimated.** Orders for U.S. durable goods climbed more than forecast in July as a surge in demand for aircraft and autos eclipsed a decrease in business equipment, including computers and machinery. Bookings for goods meant to last at least three years rose 4%, the most in four months, after falling a revised 1.3% in June, a Commerce Department report showed in Washington. The median projection of 81 economists surveyed by Bloomberg News called for a 2% gain. Orders excluding the volatile transportation category, unexpectedly advanced 0.7%. *(Bloomberg)*
- **U.K.: Manufacturing orders holding up, says CBI.** UK manufacturing orders have been better-than-expected in August, according to a survey from the CBI. Its Industrial Trends Survey found fractionally more manufacturers reporting orders above normal than those reporting below normal levels. That was an improvement from July, and the latest survey also found price pressures had begun easing after six months of high inflation. But the CBI warned that there could be trouble ahead for UK manufacturers. *(BBC News)*
- **E.U.: Euro-area services, manufacturing grow at slowest pace in almost two years.** European services and manufacturing growth held steady in August at the slowest pace in almost two years, adding to signs the euro-region recovery is losing momentum as the sovereign debt crisis persists. A composite index based on a survey of euro-area purchasing managers in both industries held at 51.1, the same as July's reading and the lowest since September 2009, London-based Markit Economics said. Economists forecast a drop to 50, the median of 15 estimates in a Bloomberg News survey showed. A reading above 50 indicates growth. *(Bloomberg)*
- **E.U.: European August consumer confidence falls more than forecast.** European consumer confidence weakened more than economists forecast in August as growth in the euro-region slowed amid the sovereign debt crisis. An index of household sentiment in the 17-nation euro area fell to minus 16.6 from minus 11.2 in July, the Brussels-based European Commission said in an initial estimate. That's the lowest since June 2010. Economists forecast a drop to minus 12.4, the median of 26 estimates in a Bloomberg News survey showed. *(Bloomberg)*
- **E.U.: German business confidence index drops to lowest level in more than a year.** German business confidence fell to the lowest in more than a year as a global slowdown and Europe's debt crisis damped the outlook for economic growth. The Ifo institute in Munich said its business climate index, based on a survey of 7,000 executives, dropped to 108.7 in August from 112.9 in July. That's the lowest since June 2010. Economists forecast a decline to 111, according to the median prediction of 37 economists in a Bloomberg News survey. The index reached a record high of 115.4 in February. *(Bloomberg)*
- **China: Manufacturing may contract for a second month, HSBC survey shows.** China's manufacturing may contract at a

slower pace in August as the world's second-biggest economy weathers slumping global confidence. A preliminary reading of 49.8 for a manufacturing index released by HSBC Holdings Plc and Markit Economics compares with a final reading of 49.3 for July. The final August number is due Sept. 1. A reading below 50 indicates a contraction. *(Bloomberg)*

- **Japan: CPI posts modest rise in July.** Core consumer prices in Japan increased in July by 0.1% over one year earlier, the Ministry of Finance reported. The increase follows a 0.2% on-year increase for national core CPI in June. Overall CPI for July was flat from the previous month. Overall August CPI for the Tokyo region, considered a leading indicator for the national trend, was up 0.1% on month. Tokyo overall CPI was down 0.2% on year. *(RTT News)*
- **Malaysia: Bank Negara Malaysia's (BNM) international reserves totalled RM411.6 billion (US\$136.1 billion) as at Aug 15, 2011.** In a statement, BNM said the reserves position is sufficient to finance 9.6 months of retained imports and is 4.5 times the short-term external debt. *(Bernama)*
- **Malaysia: July vehicle sales fall to 50,252 units.** Total vehicle sales in July declined to 50,252 units from the 53,483 units recorded in the same month last year, but jumped by 20% or 8,462 units compared with the previous month, said the Malaysian Automotive Association (MAA). The sale of passenger vehicles in July slipped to 44,835 units from 48,144 units in the same month last year, while that of commercial vehicles inched up to 5,417 units from 5,339 units. On outlook, the MAA said the sales volume for August is expected to be better than July, due to the rushed deliveries in conjunction with the Hari Raya season. *(Bernama)*

UPCOMING RELEASE (August 29 - September 2, 2011)

US

- July Personal Income by Department of Commerce on August 29, 2011.
- July Personal Spending by Bureau of Economic Analysis on August 29, 2011.
- July Pending Home Sales by National Association of Realtors on August 29, 2011.
- August Consumer Confidence by Conference Board on August 30, 2011.
- Minutes of FOMC Meeting on August 30, 2011.
- Weekly Mortgage Applications by Mortgage Bankers Association on August 31, 2011.
- Weekly Initial Jobless Claims by Department of Labor on September 1, 2011.
- July Construction Spending by US Census Bureau on September 1, 2011.
- August ISM Manufacturing by Institute for Supply Management on September 1, 2011.
- August Unemployment Rate by Bureau of Labor Statistics on September 2, 2011.

Eurozone

- August Business Climate Indicator by European Commission on August 30, 2011.
- August Consumer Confidence Indicator by European Commission on August 30, 2011.

- August Industrial Confidence Indicator by European Commission on August 30, 2011.
- August Economic Confidence Indicator by European Commission on August 30, 2011.
- August Services Confidence Indicator by European Commission on August 30, 2011.
- August Consumer Price Index Estimate by Eurostat on August 31, 2011.
- July Unemployment Rate by Eurostat on August 31, 2011.
- August Composite PMI Manufacturing by Markit on September 2, 2011.
- July Producer Price Index (PPI) by Eurostat on September 2, 2011.

Japan

- July Job-to-Applicant Ratio by Ministry of Health, Labour & Welfare on August 29, 2011.
- July Jobless Rate by Ministry of Internal Affairs on August 29, 2011.
- July Retail Trade by Ministry of Economy, Trade and Industry on August 29, 2011.
- August Small Business Confidence by Shoko Chukin Bank on August 29, 2011.
- July Industrial Production Index (IPI) by Ministry of Economy, Trade and Industry on August 30, 2011.
- July Vehicle Production by Auto Manufacturers Association (AMA)/Japan Automobile Manufacturers on August 31, 2011.
- July Construction Orders by Ministry of Land Infrastructure & Transport on August 31, 2011.
- July Housing Starts by Ministry of Land Infrastructure & Transport on August 31, 2011.
- August Official Reserve Assets by Ministry of Finance on August 31, 2011.
- August Monetary Base Average Outstanding by Bank of Japan on September 1, 2011.
- 2Q 2011 Capital Investment/Spending by Ministry of Finance on September 1, 2011.

China

- July Leading Index by National Bureau of Statistics on August 28-30, 2011.
- August PMI Manufacturing by China Federation of Logistics on August 31, 2011.

Malaysia

- 2Q 2011 Unemployment Rate by Ministry of Human Resource on August 25-31, 2011.