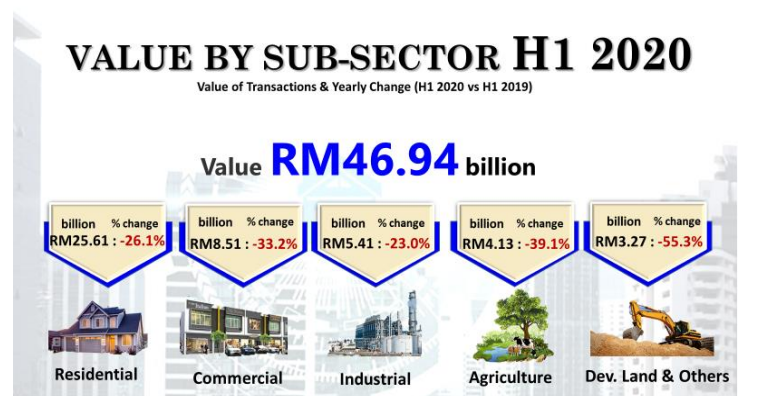
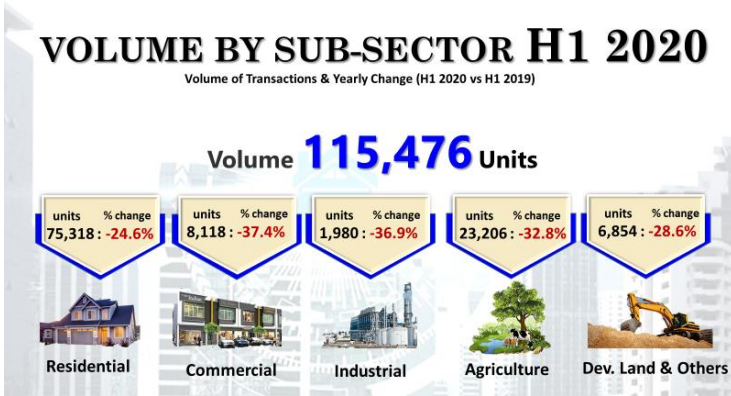
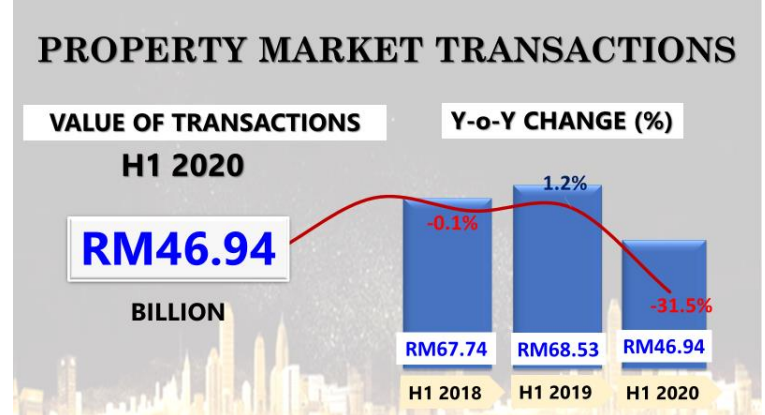
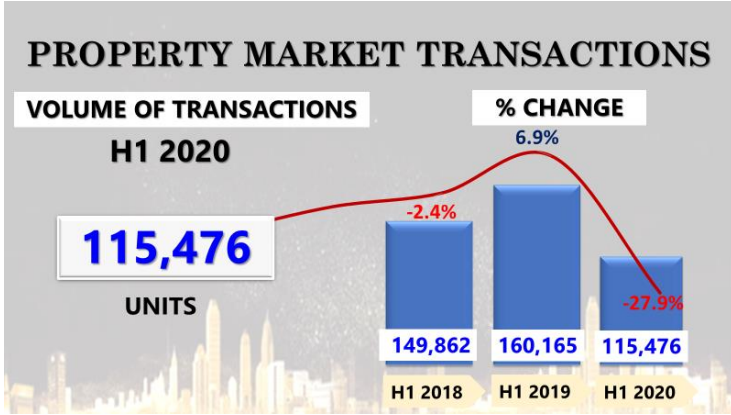


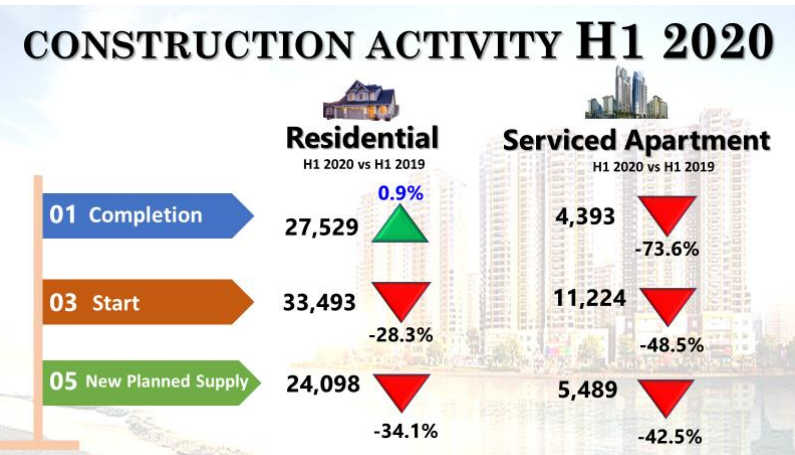


Property Market H1 2020 Overview

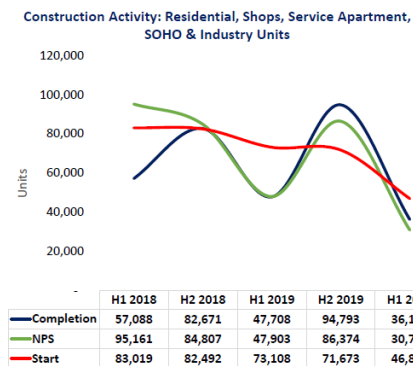
Market Activity - Property Transactions



Construction Activity



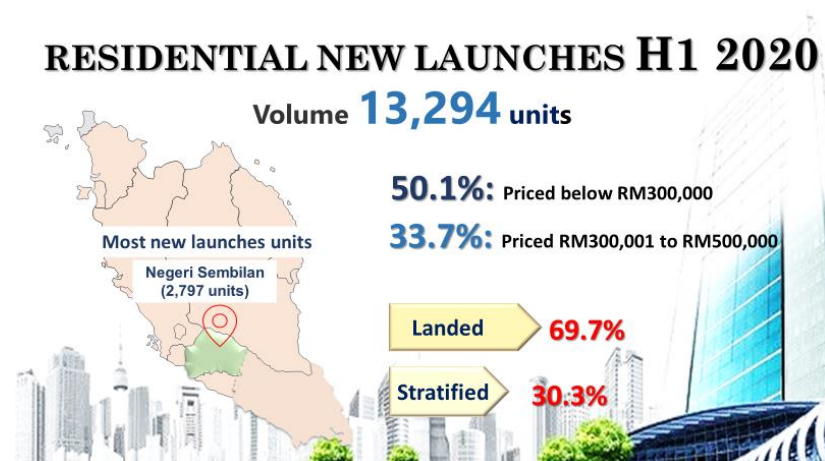
Construction Activity: Trend of Completion, Start & New Planned Supply (NPS) H1 2018 – H1 2020



Construction Activity H1 2020

	Residential	Shops & Stratified Units	Serviced Apartments	SOHO	Industry
27,529 Completions	1,542	4,393	2,526	159	
33,493 Starts	1,854	11,224	0	292	
24,098 New Planned Supply	1,054	5,489	0	138	

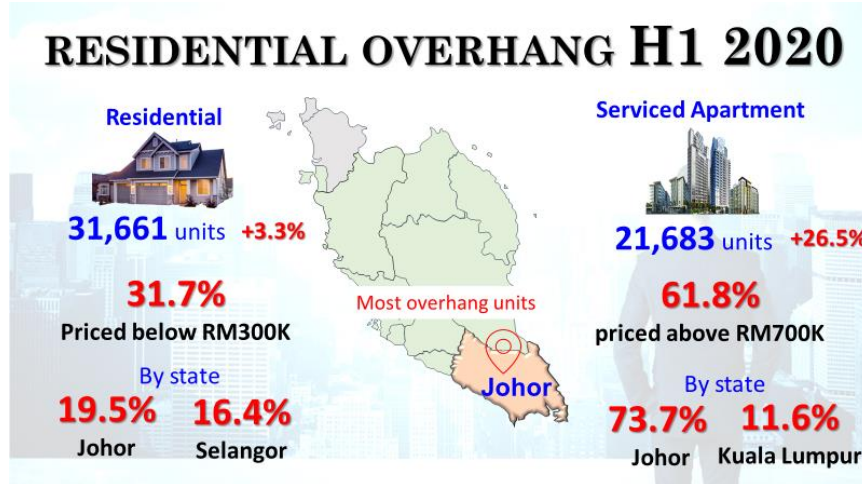
Market Status – New Launches



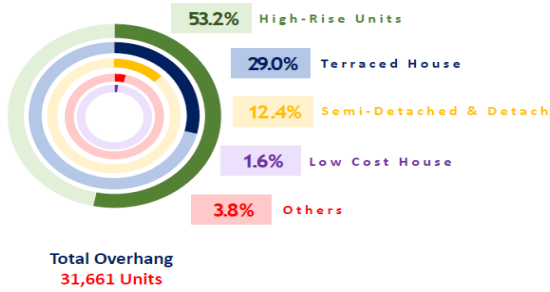


Property Market H1 2020 Overview

Market Status – Residential & Serviced Apartment Overhang



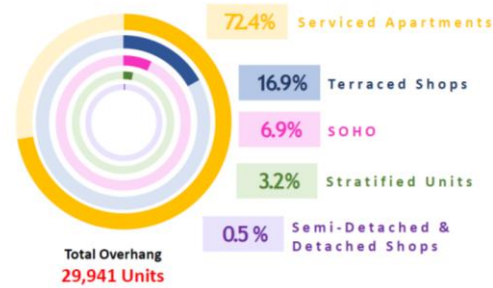
Residential Property:
Overhang Status by Type & Price Range H1 2020



Price Range (RM)	High-Rise
Below RM200K	2,348
RM200K - RM300K	3,806
RM300K - RM500K	3,830
RM500K - RM700K	4,144
RM700K - RM1 Million	1,326
Above RM1 Million	1,392
TOTAL	16,846

Price Range (RM)	Terraced
Below RM200K	671
RM200K - RM300K	2,099
RM300K - RM500K	3,037
RM500K - RM700K	1,519
RM700K - RM1 Million	1,173
Above RM1 Million	688
TOTAL	9,187

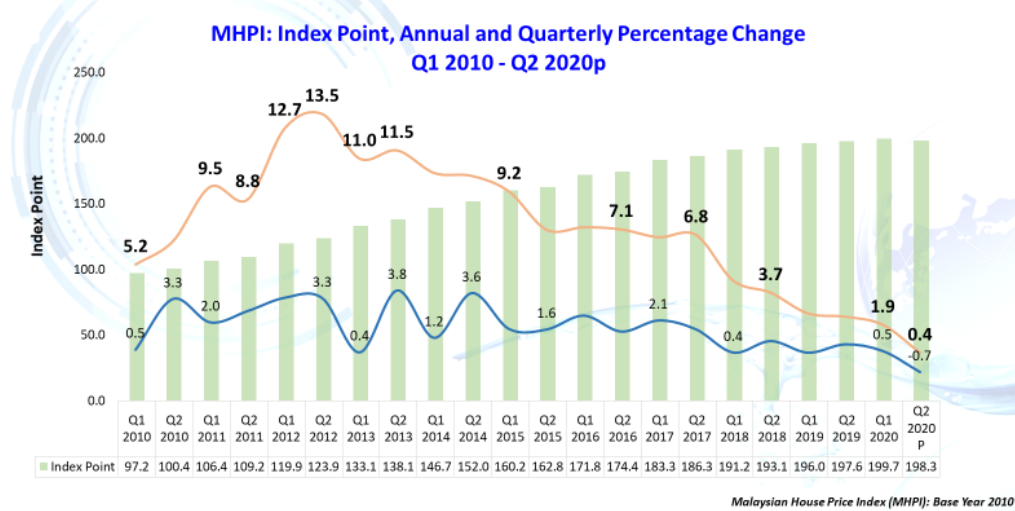
Commercial Property:
Overhang Status by Type & Price Range H1 2020



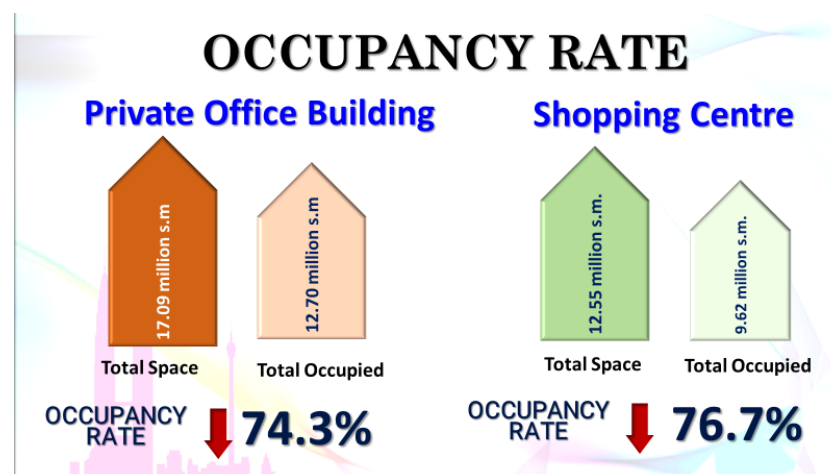
Price Range (RM)	Serviced Apartment	Terraced Shops
Below RM200K	278	120
RM200K - RM300K	77	203
RM300K - RM500K	1,638	1,114
RM500K - RM700K	4,912	1,374
RM700K - RM1 Million	8,657	1,296
Above RM1 Million	6,121	963
TOTAL	21,683	5,070

Malaysian House Price Index

MALAYSIA HOUSE PRICE INDEX



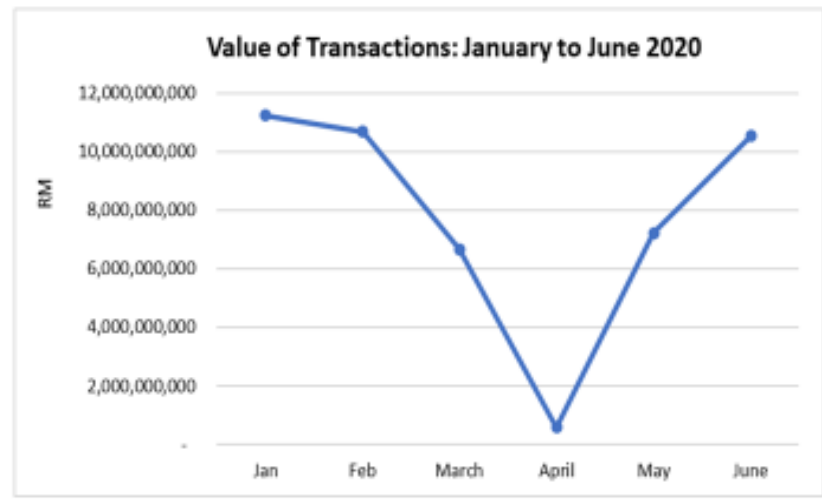
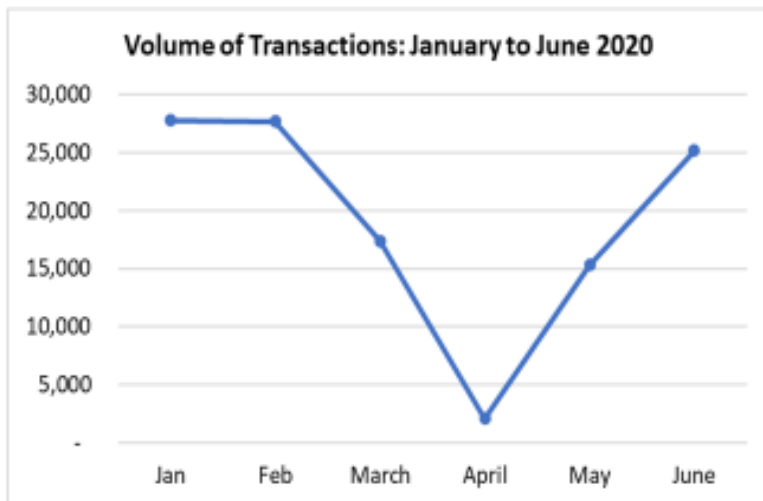
Occupancy – Purpose-Built Office & Shopping Centre





Property Market H1 2020 Overview

Outlook 2020



- Property market activity contracted sharply in March and April due to implementation of MCO (18/3/2020 – 3/5/2020)
- Market activity began picking up in May as MCO restrictions were eased (CMCO: 4/5/2020 – 9/6/2020; RMCO from June 10)
- Gradual recovery towards the end of the first half of 2020



- The property market is more than likely to **remain soft** for the remaining half of 2020.
- The pace of improvement will be depending on both **domestic and external factors** such as political stability, global oil and commodity prices as well as further developments related to the Covid-19 pandemic.