

Invest

A Weekly e-Publication by SHAREINVESTOR.com

ISSUE
47
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Via email, every Friday

Data &
Investing
Ideas

COMPANY SPOTLIGHT



See
more on
pages
30-33

Comparing 3 "Gloves Stocks" In SGX

Exclusive!

PLUS

Singapore
Top 100
Sector
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By Brand
Finance
on pages 11-20

ALSO

Investor-One Portfolio - *on pages 21-28*

TOP STOCKS OF THE WEEK

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- Growth Stocks - *on page 08*
- Value Stocks - *on page 10*



SIAS: Monthly Market Wrap:
Us Debt Ceiling Concerns
Eased To Be Replaced By
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Advice from a securities professional is strongly advised.

Market at a Glance

Over 5 trading days as at yesterday

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ShareInvestor WebPro (www.shareinvestor.com)

Prices > Stock Prices > SGX > click Stocks tab

1. mouse over Ranking > select Top Active > mouse over Column Layout > select Edit Customs > select Name > select Volume > select Last Done Price > Mouse Over Column Layout > select Custom
2. mouse over Ranking > select Top Turnover > mouse over Column Layout > select Edit Customs > select Name > select Last Done Price > select Value > Mouse Over Column Layout > select Custom
3. mouse over Ranking > select Top Gainers (Over 5 Trading Days) > mouse over

Column Layout > select Edit Customs > select Name > select Last Done Price > select 5 Days Change > select 5 Days % Change > Mouse Over Column Layout > select Custom

4. mouse over Ranking > select Top Losers (Over 5 Trading Days)
5. mouse over Ranking > select Top % Gainers (Over 5 Trading Days)
6. mouse over Ranking > select Top % Losers (Over 5 Trading Days)

Singapore Top Actives

(as at yesterday)

Name	Last Done	Volume
Seatrium	0.125	125,855.4
HSI 19800MBeCW230830	0.058	57,453.0
Wilton Resources	0.007	51,686.9
Advanced Systems	0.001	46,055.0
HSI 20400MBeCW230928	0.056	44,705.0
ThaiBev	0.575	37,479.8
ESR-LOGOS REIT	0.340	27,648.7
HSI 18200MBePW230830	0.096	24,931.0
YZJ Shipbldg SGD	1.480	23,243.8
Golden Energy	0.181	22,478.1

Top Gainers

(over 5 Trading days as at yesterday)

Name	Last Done	5 Days Chg
SPDR S&P500 US\$	443.000	8.070
SPDR DJIA US\$	345.300	6.420
GLD SG\$	240.790	1.030
GLD US\$	178.210	0.880
PlatoCapital	2.880	0.730
NIO Inc. USD OV	9.970	0.720
Lyxor MSIndia US\$	25.750	0.690
Shangri-La HKD	6.280	0.410
PTTEP TH SDR	5.800	0.330
BYD 5xLongUB250930	1.650	0.300

Top Losers

(over 5 Trading days as at yesterday)

Name	Last Done	5 Days Chg
JMH USD	48.700	-3.020
XT SingGovBond SG\$	145.770	-0.880
DBS	30.710	-0.810
XT Vietnam US\$	28.240	-0.640
SIA 5xLongSG230713	2.660	-0.620
KepCorp 5xLongSG240424	2.560	-0.440
SIA 5xLongSG240424	1.140	-0.365
Tencent 5xLongSG231102	1.880	-0.360
Sembcorp 5xLongSG250515	3.410	-0.350
HSI 5xLongUB251031	1.510	-0.290

Singapore Top Turnover

(as at yesterday)

Name	Last Done	Value
DBS	30.710	172,255,997
UOB	27.510	92,360,186
OCBC Bank	12.100	75,662,553
SIA	7.210	72,824,842
Sembcorp Ind	5.380	65,216,056
Singtel	2.490	40,990,170
Keppel Corp	6.490	37,838,061
Wilmar Intl	3.620	34,879,619
YZJ Shipbldg SGD	1.480	34,235,528
CapLand Ascendas REIT	2.710	31,674,631

Top % Gainers

(over 5 Trading days as at yesterday)

Name	Last Done	5 Days % Chg
Edition	0.007	75.00
ASL M W240723^	0.003	50.00
COSCO 5xLongUB250430	0.055	41.03
Healthway Med	0.046	39.39
HSI 7xShortUB250228	0.160	39.13
Metis Energy^	0.069	38.00
Wilmar 5xShortSG240424	0.535	37.18
Wilmar 5xShortSG230825	0.052	36.84
Figtree	0.041	36.67
Katrina	0.030	36.36

Top % Losers

(over 5 Trading days as at yesterday)

Name	Last Done	5 Days % Chg
HSI 21200MBeCW230728	0.002	-80.00
Jasper Inv^	0.001	-66.67
HSI 20200MBeCW230728	0.012	-60.00
Wilton Resources	0.007	-58.82
HSCEI 7xShortUB250430	0.042	-52.27
Advanced Systems	0.001	-50.00
CapAllianz	0.001	-50.00
LifeBrandz	0.001	-50.00
Sunny 5xLongUB250430	0.001	-50.00
TSH	0.161	-46.33

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Over 5 trading days



ShareInvestor WebPro (www.shareinvestor.com)

1. Price > Stock prices
2. select Market: Bursa / HKEX / NYSE / NASDAQ (one bourse at a time)
3. select Stocks Tab
4. select Ranking Top Gainers or Top Losers (Over 5 Trading Days)
5. Mouse over Column Layout > select Edit Customs > select Name > select Last Done Price > select 5 Days Change > select 52 Weeks High > select 52 Weeks Low > Mouse Over Column Layout > select Custom

BURSA (RM)

Top Gainers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
HEXTECH	27.600	1.380	30.600	3.500
MPI	28.840	0.840	34.980	23.600
KLK	22.840	0.680	23.140	19.420
BKAWAN	21.300	0.580	24.340	19.800
RAPID	21.820	0.440	22.140	12.300

Top Losers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
DLADY	20.800	-1.720	33.100	21.380
HLFG	17.240	-0.420	19.960	17.000
HEIM	25.820	-0.300	30.000	21.880
DKSH	4.770	-0.280	5.790	3.886
AMBANK-C41	0.100	-0.240	0.340	0.100

HONG KONG (HKD)

Top Gainers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
MIRAE ASSET GBL INVMTS (HK)LTD GLOBAL X USD MONEY MARKET ETF USD	984.500	947.800	991.850	984.050
XTRACKERS NIFTY 50 SWAP UCITS ETF 1C	1,787.500	44.000	1,790.000	1,521.000
XTRACKERS MSCI USA SWAP UCITS ETF 1C	1,003.500	16.500	1,006.000	808.200
MOG DIGITECH HOLDINGS LTD	94.250	14.550	93.800	1.640
XPENG INC	57.600	12.850	131.200	24.750

Top Losers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
YUM CHINA HOLDINGS INC	436.000	-15.400	514.500	300.000
ENN ENERGY HOLDINGS LTD	91.850	-11.450	134.800	75.000
PREMIA PARTNERS COMPANY LTD CHINA USD PROP BD ETF HKD	115.750	-11.100	194.800	65.550
CHINA TOURISM GROUP DUTY FREE CORP	105.100	-10.800	280.000	104.800
HONG KONG EXCHANGES & CLEARING	290.000	-10.800	382.400	208.200

NYSE (USD)

Top Gainers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
BERKSHIRE HATHAWAY INC	521,000.000	8,740.000	522,339.950	393,012.250
BIGLARI HOLDINGS INC	984.920	45.920	1,058.500	575.260
AUTOZONE INC	2,492.430	37.030	2,750.000	2,050.210
DECKERS OUTDOOR CORP	534.590	20.620	538.320	256.600
TEXAS PACIFIC LAND CORPORATION	1,339.440	19.730	2,739.000	1,266.210

Top Losers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
NVR INC	6,231.030	-64.580	6,386.620	3,816.555
METTLER-TOLEDO INTERNATIONAL INC	1,304.710	-12.170	1,615.970	1,065.550
LINDE PLC	367.240	-11.950	383.575	262.470
GRAHAM HOLDINGS CO	563.470	-10.200	681.700	525.580
BANK OF AMERICA CORPORATION 7.25% NON-CUM PERP CONV PFD SER L	1,164.000	-9.970	1,319.500	1,036.880

NASDAQ (USD)

Top Gainers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
MERCADOLIBRE INC	1,247.360	75.910	1,365.640	615.540
MICROSTRATEGY	378.110	37.855	378.270	132.560
TESLA INC	282.480	24.980	314.667	101.810
SUPER MICRO COMPUTER INC	255.000	19.070	270.180	37.010
NATIONAL WESTN LIFE GROUP INC	418.980	18.130	427.960	166.939

Top Losers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
MONOLITHIC POWER SYSTEM INC	523.260	-12.540	553.640	301.690
CAVCO INDUSTRIES	283.470	-12.160	318.000	193.910
LAM RESEARCH CORP	628.580	-11.780	651.010	299.592
SAIA INC	336.230	-10.580	351.410	176.700
SHOCKWAVE MEDICAL INC	275.420	-10.080	320.540	172.500



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Fundamental Analysis

Financial Analysis Statement

- ▶ Profit & Loss
- ▶ Balance Sheet
- ▶ Cash Flow Statement
- ▶ More than 20 Financial Ratios
- ▶ Dividend Analysis

Technical Charting

- ▶ C² chart (Customisable & Comprehensive)

Brokers' Call

Intrinsic Value Calculator

FactSheet

- ▶ Key Stock Information
- ▶ Ownership
- ▶ Consensus Estimates
- ▶ Annual Report
- ▶ Historical Price
- ▶ Insider Trades

What's new on WebPro (Stable Release 12.1.0)

In our effort to keep our platform at the forefront of trading technology, we have added on some new features onto our C2 Chart in WebPro

ADDITIONAL NEW FEATURES:

- ▶ Anchor selector for AVWAP, PVAT, and PAV indicators
- ▶ Volume profile indicator by date range
- ▶ Moving Average Cross indicator
- ▶ Guppy Multiple Moving Average (GMMA) indicator
- ▶ GoNoGo Trend Signal indicators
- ▶ SignalIQ

So what are you waiting for? Head to our platform today and check out our new trading chart features and indicators. We're confident that you'll love the improvements we've made and that they'll help you become a more successful trader.

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Dividend Stocks

Price & Total Shareholder Return (as at yesterday)



DEFINITION Company is paying out dividend with low or moderate leverage.

CHART GUIDE Total Shareholder Return (TSR) combines share price appreciation and distributions paid to show the total return to the shareholder expressed as a percentage.



ShareInvestor WebPro > Screener > Market Screener (FA & TA) > select SGX > add criteria

A. Criteria

- > click Add Criteria
- Fundamental Analysis Conditions tab >select (i) Dividend Yield
- Fundamental Analysis Conditions tab >select (ii) Dividend Payout (Historical)
- Fundamental Analysis Conditions tab >select (iii) Total Debt To Equity
- Fundamental Analysis Conditions tab >select (iv) Total Shareholder Returns

- Fundamental Analysis Conditions tab >select (v) Total Shareholder Returns
- Fundamental Analysis Conditions tab / >select (vi) CAGR of Dividend Per Share
- Fundamental Analysis Conditions tab >select (vii) CAGR of Dividend Per Share

B. Conditions (Criteria Filters)

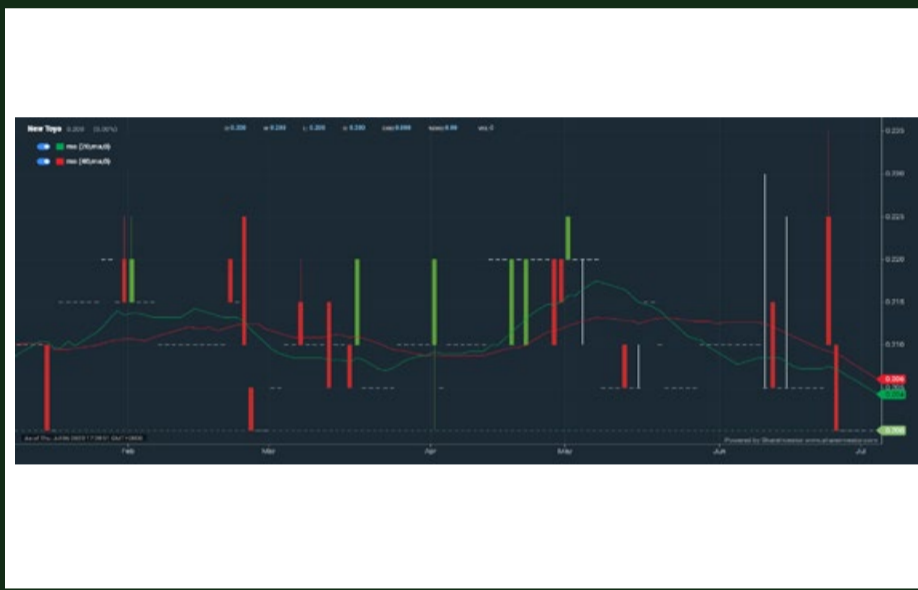
1. Dividend Yield - select (more than) type (1) % for the past select (1) financial year(s)
2. Dividend Payout (Historical) - select (between) type (0.5) to type (1) times for the past select (1) financial year(s)
3. Total Debt to Equity – select (less than) type (1) for the past select (1) financial year(s)
4. Total Shareholder Return – select (more than) type (5) % for the past select (3) financial year(s)
5. Total Shareholder Return – select (more than) type (5) % for the past select (5) financial year(s)

6. CAGR of Dividend Per Share – select (less than) type (30) % for the past select (5) financial year(s)
 7. CAGR of Dividend Per Share – select (more than) type (1) % for the past select (5) financial year(s)
- > click Save Template > Create New Template type (Dividend Companies) > click Create
 - > click Save Template as > select Dividend Companies > click Save
 - > click Screen Now (may take a few minutes)
 - > Sort By: Select (Dividend Yield) Select (Desc)
 - > Mouse over stock name > Factsheet > looking for Total Shareholder Return



New Toyo (SGX:N08)

ANALYSIS

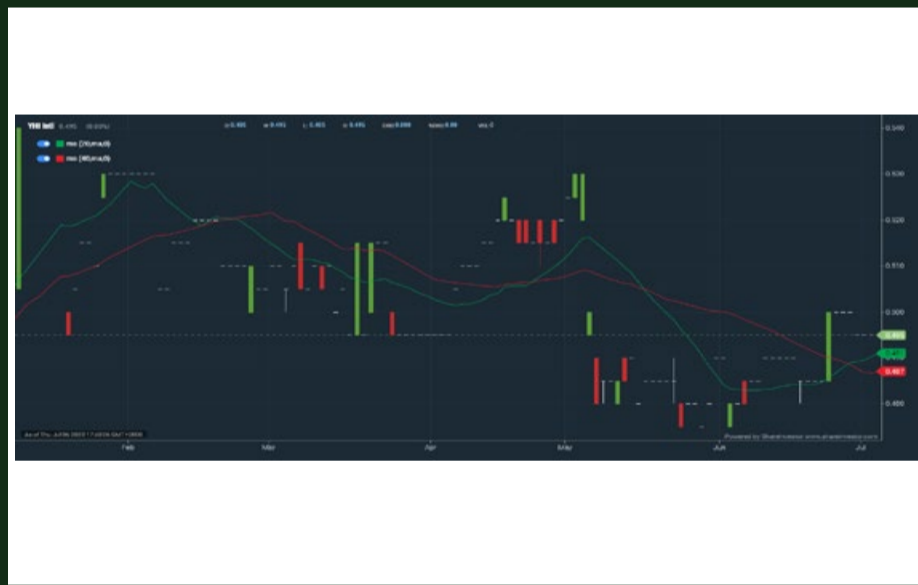


Period	Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-
	10 Days	-	-0.005
	20 Days	-	-0.010
Medium Term Return	3 Months	0.009	-0.010
	6 Months	0.009	-0.020
	1 Year	0.010	-0.000
Long Term Return	2 Years	0.033	-0.010
	3 Years	0.045	-0.060
	5 Years	0.072	-0.030
Annualised Return	Annualised	-	-



YHI Intl (SGX: BPF)

ANALYSIS

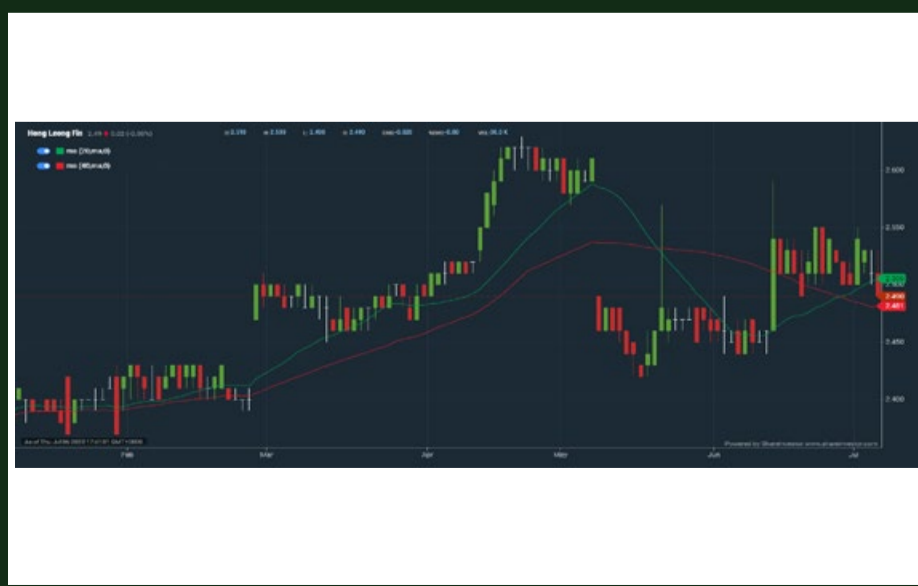


Period	Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-0.005
	10 Days	-	-0.010
	20 Days	-	-0.015
Medium Term Return	3 Months	0.036	-
	6 Months	0.036	-0.049
	1 Year	0.036	-0.005
Long Term Return	2 Years	0.072	-0.015
	3 Years	0.105	-0.205
	5 Years	0.151	-0.065
Annualised Return	Annualised	-	-



Hong Leong Fin (SGX: S41)

ANALYSIS



Period	Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-0.010
	10 Days	-	-0.030
	20 Days	-	-0.050
Medium Term Return	3 Months	0.133	-0.020
	6 Months	0.133	-0.100
	1 Year	0.170	-0.060
Long Term Return	2 Years	0.290	-0.060
	3 Years	0.380	+0.110
	5 Years	0.600	-0.110
Annualised Return	Annualised	-	-

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- ▶ Trade Summary Matrix & Chart
- ▶ Times & Sales
- ▶ Intraday Market Ticker

Market Screener

- ▶ 96 criteria ranging from FA, TA, Consensus Estimate
- ▶ Real-time Data

Power Frame

- ▶ Combining few Dynamic Charts together with intraday information in one frame

Technical Analysis

Fundamental Analysis

Financial Analysis Statement

- ▶ Profit & Loss
- ▶ Balance Sheet
- ▶ Cash Flow Statement
- ▶ More than 20 Financial Ratios
- ▶ Dividend Analysis

FactSheet

- ▶ Key Stock Information
- ▶ Ownership
- ▶ Consensus Estimates
- ▶ Annual Report
- ▶ Historical Price
- ▶ Insider Trades

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DEFINITION Company revenue is growing and making good quality of earnings with positive Free Cash Flow.

CHART GUIDE Total Shareholder Return (TSR) combines share price appreciation and distributions paid to show the total return to the shareholder expressed as a percentage.



ShareInvestor WebPro > Screener > Market Screener (FA & TA) > select SGX > add criteria

A. Criteria

1. Fundamental Analysis Conditions tab >select (i) Free Cash Flow, (ii) Revenue Growth, (iii) Gross Profit (Earnings) Margin, (iv) Quality of Earnings, (v) Total Shareholder Returns, > click Add Criteria
2. Fundamental Analysis Conditions tab >select (vi) Total Shareholder Returns > click Add Criteria

B. Conditions (Criteria Filters)

1. Free Cash Flow - select (more than) type (1) for the past select (1) financial year(s)
 2. Revenue Growth - select (more than) type (1) for the past select (1) financial year(s)
 3. Gross Profit (Earnings) Margin - select (more than) type (30) % for the past select (1) financial year(s)
 4. Quality of Earnings - select (more than) type (1) for the past select (1) financial year(s)
 5. Total Shareholder Return - select (more than) type (5) % for the past select (3) financial year(s)
 6. Total Shareholder Return - select (more than) type (5) % for the past select (5) financial year(s)
- > click Save Template > Create New Template type (Growth Companies) > click Create

- > click Save Template as > select Growth Companies > click Save
- > click Screen Now (may take a few minutes)
- > Sort By: Select (Revenue Growth) Select (Desc)
- > Mouse over stock name > Factsheet > looking for Total Shareholder Return



Golden Energy (SGX: AUE)



Period	Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-0.043	-19.20%
	10 Days	-0.045	-19.91%
	20 Days	-0.042	-18.83%
Medium Term Return	3 Months	-0.056	-25.63%
	6 Months	-0.003	-1.63%
	1 Year	-0.081	-41.00%
Long Term Return	2 Years	+0.101	+126.29%
	3 Years	+0.143	+276.32%
	5 Years	0.017	+156.63%
Annualised Return	Annualised	-	+26.17%



Acesian Partners (SGX: 5FW)



Period	Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	+0.004	+8.00%
	10 Days	+0.001	+1.89%
	20 Days	+0.002	+3.85%
Medium Term Return	3 Months	-0.009	-14.29%
	6 Months	+0.013	+21.71%
	1 Year	+0.005	+10.20%
Long Term Return	2 Years	+0.035	+184.21%
	3 Years	+0.081	+316.38%
	5 Years	+0.036	+200.00%
Annualised Return	Annualised	-	+24.57%



SamuderaShipping (SGX: S56)



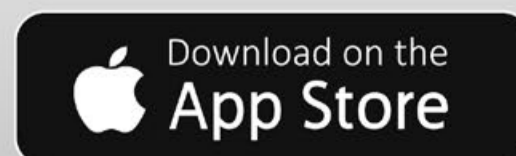
Period	Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-
	10 Days	-	-1.13%
	20 Days	-	-1.13%
Medium Term Return	3 Months	0.250	+11.28%
	6 Months	0.250	+89.94%
	1 Year	0.320	+96.87%
Long Term Return	2 Years	0.460	+283.70%
	3 Years	0.471	+1316.64%
	5 Years	0.488	+963.28%
Annualised Return	Annualised	-	+68.45%

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DEFINITION Share price of a company trading at a lower price as compared to its fundamentals (FA) such as financial performance and dividend, allowing it to be attractive to value investors.
CHART GUIDE Total Shareholder Return (TSR) combines share price appreciation and dividend distributions paid to show the total return to the shareholder expressed as a percentage.



ShareInvestor WebPro > Screener > Market Screener (FA & TA) > select SGX > add criteria

- A. Criteria**
 > click Add Criteria
- Fundamental Analysis Conditions tab (i) Price Earnings Ratio
 - Fundamental Analysis Conditions tab >select (ii) CAGR of Net Earnings
 - Fundamental Analysis Conditions tab >select (iii) Net Debt To Equity
 - Fundamental Analysis Conditions tab >select (iv) Return On Equity (ROE)

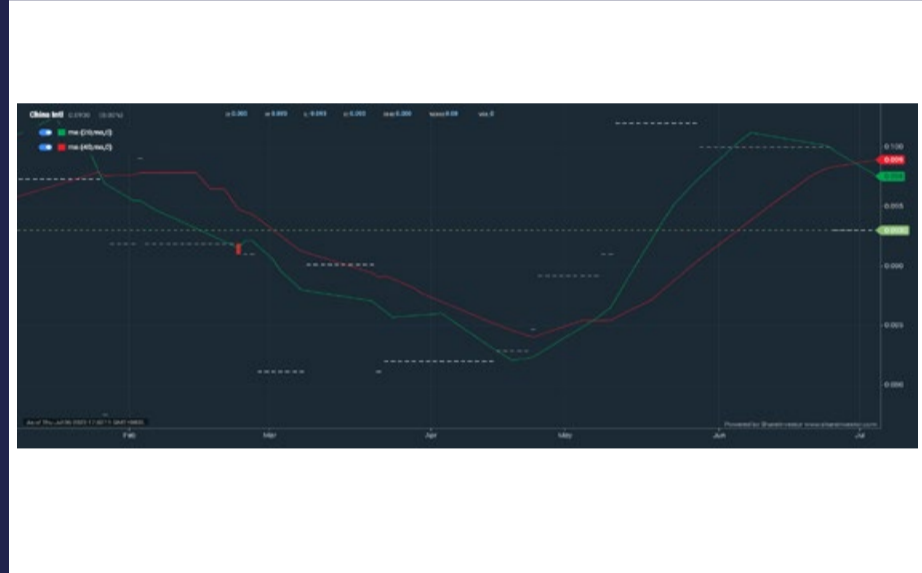
- B. Conditions**
1. Price Earnings Ratio - select (less than) type (15) times now
 2. CAGR of Net Earnings - select (more than) type (10) % for the past type (3) financial year(s)
 3. Net Debt To Equity – select (less than) type (1) for the past select (1) financial year(s)
 4. Return On Equity (ROE) – select (more than) type (10) % for the past select (1) financial year(s)

- > click Save Template > Create New Template type (Value Stock) > click Create
- > click Save Template as > select Value Companies > click Save
- > click Screen Now (may take a few minutes)
- > Mouse over stock name > Factsheet > looking for Total Shareholder Return
- > Mouse over stock name > Charts > click C2 Charts tab



China Intl (SGX: BEH)

ANALYSIS

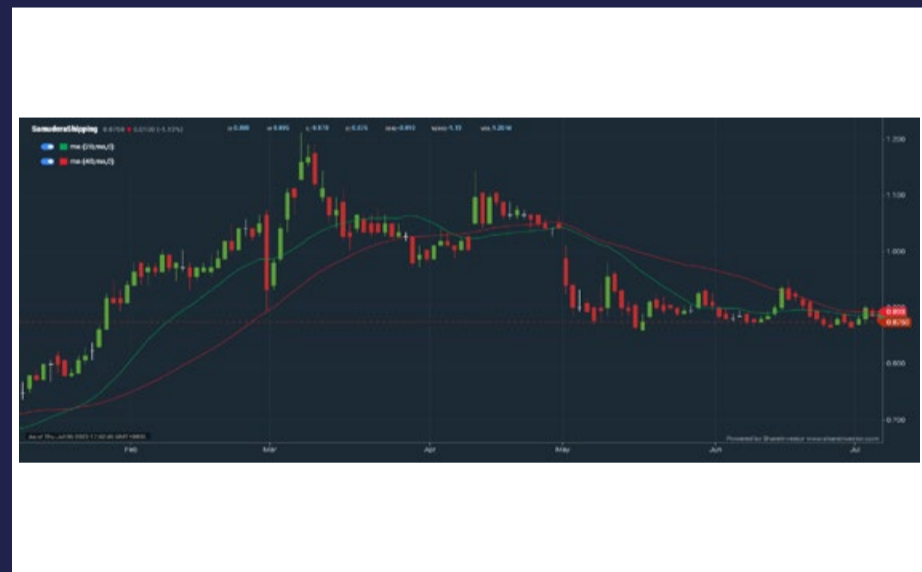


Period	Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-
	10 Days	-	-7.00%
	20 Days	-	-7.00%
Medium Term Return	3 Months	0.010	+25.81%
	6 Months	0.010	+4.04%
	1 Year	0.010	-27.46%
Long Term Return	2 Years	0.010	-63.73%
	3 Years	0.040	-63.96%
	5 Years	0.040	-66.83%
Annualised Return	Annualised	-	-15.81%



SamuderaShipping (SGX:S56)

ANALYSIS



Period	Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-
	10 Days	-	-1.13%
	20 Days	-	-1.13%
Medium Term Return	3 Months	0.250	+11.28%
	6 Months	0.250	+59.94%
	1 Year	0.320	+86.87%
Long Term Return	2 Years	0.460	+263.70%
	3 Years	0.471	+176.64%
	5 Years	0.488	+983.28%
Annualised Return	Annualised	-	+50.45%



Golden Energy (SGX: AUE)

ANALYSIS



Period	Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-19.20%
	10 Days	-	-19.91%
	20 Days	-	-18.83%
Medium Term Return	3 Months	-	-23.63%
	6 Months	-	-1.63%
	1 Year	-	+81.00%
Long Term Return	2 Years	-	+126.25%
	3 Years	-	+376.32%
	5 Years	0.017	+168.83%
Annualised Return	Annualised	-	+20.17%

Brand Finance®



Singapore 100 2023

The annual report on the most valuable and strongest Singaporean brands
May 2023

Brand Finance Singapore 100 2023

Top 100 most valuable Singaporean brands 1-50

2023 Rank	2022 Rank		Brand	Sector	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
1	1	←	DBS	Banking	10,509	+21%	8,674	AAA	AAA
2	2	←	UOB	Banking	5,540	+13%	4,920	AAA-	AAA-
3	3	←	OCBC Bank	Banking	5,412	+13%	4,795	AAA-	AAA-
4	4	←	Singtel	Telecoms	4,097	+6%	3,882	AAA	AAA
5	5	←	Great Eastern	Insurance	3,403	+10%	3,093	AAA-	AAA-
6	6	←	Singapore Airlines	Airlines	2,223	+8%	2,065	AA+	AA+
7	10	↑	Olam	Food	1,484	+40%	1,056	A+	A+
8	8	←	NTUC Income	Insurance	1,260	+17%	1,080	AAA-	AAA-
9	7	↓	SPC	Oil & Gas	1,181	+0.4%	1,177	AA-	AA-
10	9	↓	Tiger	Beers	1,133	+6%	1,070	AA	AA+
11	13	↑	FairPrice	Retail	🔒	🔒	🔒	🔒	🔒
12	17	↑	Sembcorp	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
13	16	↑	Bigo	Media	🔒	🔒	🔒	🔒	🔒
14	15	↑	ST Engineering	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
15	11	↓	Starhub	Telecoms	🔒	🔒	🔒	🔒	🔒
16	12	↓	ComfortDelGro	Logistics	🔒	🔒	🔒	🔒	🔒
17	19	↑	Wilmar	Food	🔒	🔒	🔒	🔒	🔒
18	18	←	Giti	Tyres	🔒	🔒	🔒	🔒	🔒
19	21	↑	Keppel	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
20	22	↑	PSA International	Logistics	🔒	🔒	🔒	🔒	🔒
21	24	↑	Fraser and Neave	Soft Drinks	🔒	🔒	🔒	🔒	🔒
22	23	↑	Changi Airport	Airports	🔒	🔒	🔒	🔒	🔒
23	-	New	CapitaLand Investment	Real Estate	🔒	🔒	🔒	🔒	🔒
24	20	↓	Jardine Cycle & Carriage	Automobiles	🔒	🔒	🔒	🔒	🔒
25	25	←	Mapletree	Real Estate	🔒	🔒	🔒	🔒	🔒
26	27	↑	SGX	Exchanges	🔒	🔒	🔒	🔒	🔒
27	28	↑	JTC	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
28	26	↓	Frasers Property	Real Estate	🔒	🔒	🔒	🔒	🔒
29	29	←	M1	Telecoms	🔒	🔒	🔒	🔒	🔒
30	30	←	City Developments	Hotels	🔒	🔒	🔒	🔒	🔒
31	40	↑	Sheng Siong	Retail	🔒	🔒	🔒	🔒	🔒
32	32	←	Guocoland	Real Estate	🔒	🔒	🔒	🔒	🔒
33	33	←	Parkway	Healthcare Facilities	🔒	🔒	🔒	🔒	🔒
34	34	←	UOL	Real Estate	🔒	🔒	🔒	🔒	🔒
35	35	←	Hong Leong Asia	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
36	-	New	Grab	Car Rental Services	🔒	🔒	🔒	🔒	🔒
37	38	↑	SATS	Commercial Services	🔒	🔒	🔒	🔒	🔒
38	42	↑	Singapore Post	Logistics	🔒	🔒	🔒	🔒	🔒
39	31	↓	Millennium Hotels	Hotels	🔒	🔒	🔒	🔒	🔒
40	-	New	Pan Pacific	Hotels	🔒	🔒	🔒	🔒	🔒
41	39	↓	Kopitiam	Retail	🔒	🔒	🔒	🔒	🔒
42	44	↑	SP Group	Utilities	🔒	🔒	🔒	🔒	🔒
43	47	↑	Scoot	Airlines	🔒	🔒	🔒	🔒	🔒
44	45	↑	Venture	Tech	🔒	🔒	🔒	🔒	🔒
45	46	↑	SMRT	Logistics	🔒	🔒	🔒	🔒	🔒
46	50	↑	UOB Kay Hian	Banking	🔒	🔒	🔒	🔒	🔒
47	49	↑	SBS	Logistics	🔒	🔒	🔒	🔒	🔒
48	53	↑	Raffles Medical	Healthcare Facilities	🔒	🔒	🔒	🔒	🔒
49	48	↓	Copthorne Hotels	Hotels	🔒	🔒	🔒	🔒	🔒
50	57	↑	The Hour Glass	Retail	🔒	🔒	🔒	🔒	🔒

Brand Finance Singapore 100 2023

Top 100 most valuable Singaporean brands 51-100

2023 Rank	2022 Rank		Brand	Sector	2023 Brand Value	Brand Value Change	2022 Brand Value	2023 Brand Rating	2022 Brand Rating
51	51	←	SIA Engineering	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
52	52	←	YEO'S	Soft Drinks	🔒	🔒	🔒	🔒	🔒
53	-	New	Park Royal	Hotels	🔒	🔒	🔒	🔒	🔒
54	55	↑	Food Empire	Food	🔒	🔒	🔒	🔒	🔒
55	63	↑	Cortina Holdings	Retail	🔒	🔒	🔒	🔒	🔒
56	54	↓	SingLand	Real Estate	🔒	🔒	🔒	🔒	🔒
57	58	↑	Ho Bee Land	Real Estate	🔒	🔒	🔒	🔒	🔒
58	60	↑	Banyan Tree	Hotels	🔒	🔒	🔒	🔒	🔒
59	59	←	OUE	Real Estate	🔒	🔒	🔒	🔒	🔒
60	61	↑	Hi-P	Tech	🔒	🔒	🔒	🔒	🔒
61	62	↑	Wing Tai	Real Estate	🔒	🔒	🔒	🔒	🔒
62	56	↓	SUNTEC	Real Estate	🔒	🔒	🔒	🔒	🔒
63	67	↑	iFAST	Commercial Services	🔒	🔒	🔒	🔒	🔒
64	66	↑	GP Industries	Tech	🔒	🔒	🔒	🔒	🔒
65	68	↑	CSE	Tech	🔒	🔒	🔒	🔒	🔒
66	70	↑	Hong Leong Finance	Banking	🔒	🔒	🔒	🔒	🔒
67	73	↑	AEM	Tech	🔒	🔒	🔒	🔒	🔒
68	72	↑	Challenger	Retail	🔒	🔒	🔒	🔒	🔒
69	74	↑	Delfi	Food	🔒	🔒	🔒	🔒	🔒
70	81	↑	Thomson Medical	Healthcare Facilities	🔒	🔒	🔒	🔒	🔒
71	77	↑	Pan-United	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
72	69	↓	Maxicash	Retail	🔒	🔒	🔒	🔒	🔒
73	75	↑	Wee Hur	Real Estate	🔒	🔒	🔒	🔒	🔒
74	71	↓	Tiger Balm	Pharma	🔒	🔒	🔒	🔒	🔒
75	82	↑	Hotel Grand Central	Hotels	🔒	🔒	🔒	🔒	🔒
76	85	↑	Amara	Hotels	🔒	🔒	🔒	🔒	🔒
77	80	↑	Jumbo	Restaurants	🔒	🔒	🔒	🔒	🔒
78	76	↓	SoilBuild	Real Estate	🔒	🔒	🔒	🔒	🔒
79	78	↓	ValueMax	Retail	🔒	🔒	🔒	🔒	🔒
80	84	↑	Q & M	Healthcare Facilities	🔒	🔒	🔒	🔒	🔒
81	79	↓	Far East Orchard	Real Estate	🔒	🔒	🔒	🔒	🔒
82	64	↓	MindChamps	Commercial Services	🔒	🔒	🔒	🔒	🔒
83	83	←	Neo Group	Commercial Services	🔒	🔒	🔒	🔒	🔒
84	89	↑	LHN Group	Real Estate	🔒	🔒	🔒	🔒	🔒
85	-	New	Park Royal Collection	Hotels	🔒	🔒	🔒	🔒	🔒
86	-	New	Telechoice International	Tech	🔒	🔒	🔒	🔒	🔒
87	92	↑	Raffles Education	Commercial Services	🔒	🔒	🔒	🔒	🔒
88	88	←	World Class Land	Retail	🔒	🔒	🔒	🔒	🔒
89	87	↓	Aspial	Retail	🔒	🔒	🔒	🔒	🔒
90	90	←	Stamford Tyres	Tyres	🔒	🔒	🔒	🔒	🔒
91	98	↑	Choo Chiang	Tech	🔒	🔒	🔒	🔒	🔒
92	91	↓	Haw Par	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
93	94	↑	Metro	Retail	🔒	🔒	🔒	🔒	🔒
94	96	↑	Kingsmen	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
95	100	↑	Huatong Global	Engineering & Construction	🔒	🔒	🔒	🔒	🔒
96	99	↑	ASL	Commercial Services	🔒	🔒	🔒	🔒	🔒
97	93	↓	Creative	Tech	🔒	🔒	🔒	🔒	🔒
98	-	New	SOG Health	Healthcare Facilities	🔒	🔒	🔒	🔒	🔒
99	-	New	MoneyMax	Retail	🔒	🔒	🔒	🔒	🔒
100	-	New	UG HEALTHCARE	Pharma	🔒	🔒	🔒	🔒	🔒

Brand Finance Singapore 100 2023

Sector Analysis.



Brand Finance Singapore 100 2023

Banking

Banking brands in Singapore recorded stellar results for 2022 as they continued to post strong earnings in the fourth quarter of the year on the back of higher net interest income. Rate hikes by the Federal Reserve throughout 2022 have driven up borrowing costs and boosted their net interest margins (NIMs).

With 2022 financial performances exceeding pre-pandemic levels, we expect banking brands in Singapore to perform better in 2023 driven by higher margins and income from rising fees.

We also note that Singapore boasts the only banking sector in the Asia Pacific with a positive outlook for 2023, premised on higher margins and benign asset quality despite a muted loan-growth forecast.

With a combined total of \$21.7 billion, banking brands were the largest contributor of brand value in our rankings – approximately 38% of the total brand value of all brands listed.

DBS remains the most valuable brand in Singapore with its brand value up 21% to \$10.5 billion. This is largely owing to its brand strength improvement and

expected strong revenue forecasts in the coming years. DBS' total income rose by 16% to S\$16.5 billion (\$12.30 billion), crossing the S\$16 billion (\$11.93 billion) mark for the first time. In addition to recording strong business performance in 2022, the brand is increasingly recognised as a global leader in digital transformation.

DBS increased its artificial intelligence (AI) and machine learning (ML) use cases by seven times to 260, enabling the brand to achieve about S\$150 million (\$111.83 million) additional revenue in 2022 from these use cases alone. DBS aims to achieve S\$1 billion (\$745.55 million) in revenue from AI/ML initiatives within the next five years.

UOB, the second most valuable brand in Singapore, saw an increase in brand value by 13% to \$5.5 billion, mainly driven by revenue growth. This revenue growth, in turn, was largely attributed to UOB's wholesale business and regional expansion. In addition, the brand's acquisition of Citigroup's consumer businesses in Malaysia and Thailand added 1.3 million net customers to UOB's retail customer base and is expected to add \$1 billion to its revenue in 2023.



Brand Finance Singapore 100 2023

Looking ahead, **UOB** has forecasted mid-single-digit loan growth, double-digit fee growth, and NIMs hovering at 2.22%. The brand is optimistic about Asia's moderate growth and expects its acquisition of Citigroup's regional consumer units to bolster its wealth management business.

On the ESG front, UOB has announced commitments to reach net-zero by 2050 in 2022, underlining its goal to support a just transition that advances sustainable socioeconomic development in tandem with decarbonisation in Southeast Asia.

OCBC Bank reported a steady 13% increase in brand value to \$5.4 billion. The brand posted strong fiscal performance in 2022, generating an 18% increase in net profit to S\$5.75 billion (\$4.30 billion). Contributing to this performance was OCBC Bank's ability to leverage surging interest rates whilst maintaining strong funding, liquidity and capital positions.

The brand seeks to expand trade and investment flows in ASEAN and Greater China as well as foster greater cross-border trading across the region in high-value and emerging sectors.

OCBC Bank aims to become a regional hub for foreign investors, solidifying its role as a formidable player in the region. The brand continues to be resolute in its commitment to sustainability with its business operations attaining net-zero carbon emissions and its financing of sustainable buildings and projects that produce renewable energy.

Hong Leong Finance saw its brand value grow by 12% to \$41.27 million. The brand centered its business operations around digitalisation by implementing the use of omnichannels to meet consumer needs.

In 2022, Hong Leong Finance collaborated with a local fintech company, **Nium**, to launch its own multi-currency e-wallet, allowing customers to experience a more convenient way of banking. Through efforts to reduce its carbon footprint, Hong Leong Finance actively incorporates "Employee, Environmental, Societal and Governance (EESG)" principles into the risk assessments of its business partnerships.



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Telecoms

Singapore boasts world leadership in its telecommunications sector, owing to a highly developed network and progressive regulatory environment. With its well-developed telecoms infrastructure, the nation has one of the fastest mobile internet speeds in the region, becoming the first country in the world to achieve nationwide 5G coverage. In 2022, the sector accounted for 1.92% of Singapore's gross domestic product, a proportion in line with other developed countries. Telecoms brands were the second largest contributor of brand value, posting \$5.4 billion or approximately 9% of the combined brand value of all brands listed in our rankings.

Singtel, the most valuable telecoms brand in Singapore, saw its brand value increase by 5.5% to \$4.1 billion. Singtel is also the strongest brand in Singapore, with a Brand Strength Index score of 88.3 out of 100 while maintaining its AAA brand strength rating. The brand has been a market leader in the telecommunications sector in Singapore for decades, with a dominant market share in the mobile, broadband, and fixed-line markets. It is also the first operator to launch a 5G standalone network in Singapore. In 2022, Singtel achieved over 95% standalone 5G nationwide coverage.

Although Singtel's first half operating revenue in 2022 was down 5% to S\$7.26 billion (\$5.41 billion) due to adverse currency effects and the absence of revenue from NBN migration and Amobee, there was a major

rebound in the brand's core business in line with post-pandemic travel resumption that provided tailwinds for roaming revenues across both consumer and enterprise businesses.

Starhub posted a 12% dip in brand value to \$909.24 million. By the end of 2022, the brand reported a 58.3% decrease in net profit attributable to shareholders (NPAT) of S\$62.2 million (\$46.42 million). Nonetheless, Starhub emerged resilient and recorded an NPAT of S\$37.5 million (\$27.99 million) in the first quarter of 2023 due to profit increases across its mobile, broadband and entertainment service offerings as well as in its enterprise business. The brand has embarked on its sustainability journey by commencing a Green Tech Managed Services programme in 2022, encouraging customers to adopt low-carbon and energy efficient services.

M1 saw its brand value decrease by 12% to \$408.05 million. In 2022, the brand saw its net profit rise by 9% to S\$854 million (\$637.31 million) compared to the same period last year. This was mainly driven by greater service revenues from enterprise businesses and postpaid services. By the end of September 2022, M1 gained a 12% growth in postpaid customer base, accumulating over 1.8 million recipients and reaching over 90% of 5G outdoor network coverage across the nation. The brand intends to work towards realising a net-zero vision by harnessing clean energy and purchasing renewable energy certificates (RECs).



Brand Finance Singapore 100 2023

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With one of the world's leading reports on Singapore's most valuable brands at your fingertips, expand your insights with coverage on ASEAN's top brands in our first-ever ASEAN 250 2023 report releasing globally in September 2023.

Alongside this report, Brand Finance proudly presents...

Brand Value Trends: The Importance of Corporate Conduct and Leadership for Brands in ASEAN

SAVE THE DATE

17 October 2023 | 2.00PM (SGT) | 6.00AM (GMT)
A Zoom-only event

- 1 Recognise** the role senior leaders play in building brand value and brand strength as well as who the top "Brand Guardians" in the region are
- 2 Discover** why analysing the gap between brand perceptions and brand performance is important and which brands do best
- 3 Understand** how corporate conduct and sustainability help build brand value
- 4 Learn** about the factors that drive brand value performance in ASEAN and how you can leverage these
- 5 Find** out the top brands by brand value, brand strength and brand popularity in each sector across ASEAN

✉ Register your interest today at bfs@brandfinance.com

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About Brand Finance.

Brand Finance is the world's leading brand valuation consultancy.

We bridge the gap between marketing and finance

Brand Finance was set up in 1996 with the aim of 'bridging the gap between marketing and finance'. For more than 25 years, we have helped companies and organisations of all types to connect their brands to the bottom line.

We quantify the financial value of brands

We put thousands of the world's biggest brands to the test every year. Ranking brands across all sectors and countries, we publish over 100 reports annually.

We offer a unique combination of expertise

Our teams have experience across a wide range of disciplines from marketing and market research, to brand strategy and visual identity, to tax and accounting.

We pride ourselves on technical credibility

Brand Finance is a chartered accountancy firm regulated by the Institute of Chartered Accountants in England and Wales, and the first brand valuation consultancy to join the International Valuation Standards Council.

Our experts helped craft the internationally recognised standards on Brand Valuation – ISO 10668 and Brand Evaluation – ISO 20671. Our methodology has been certified by global independent auditors – Austrian Standards – as compliant with both, and received the official approval of the Marketing Accountability Standards Board.



IVSC
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Brand Valuation Summary



Brand Strength Tracking



Royalty Rates



Cost of Capital Analysis



Customer Research Findings



Competitor Benchmarking

Benefits

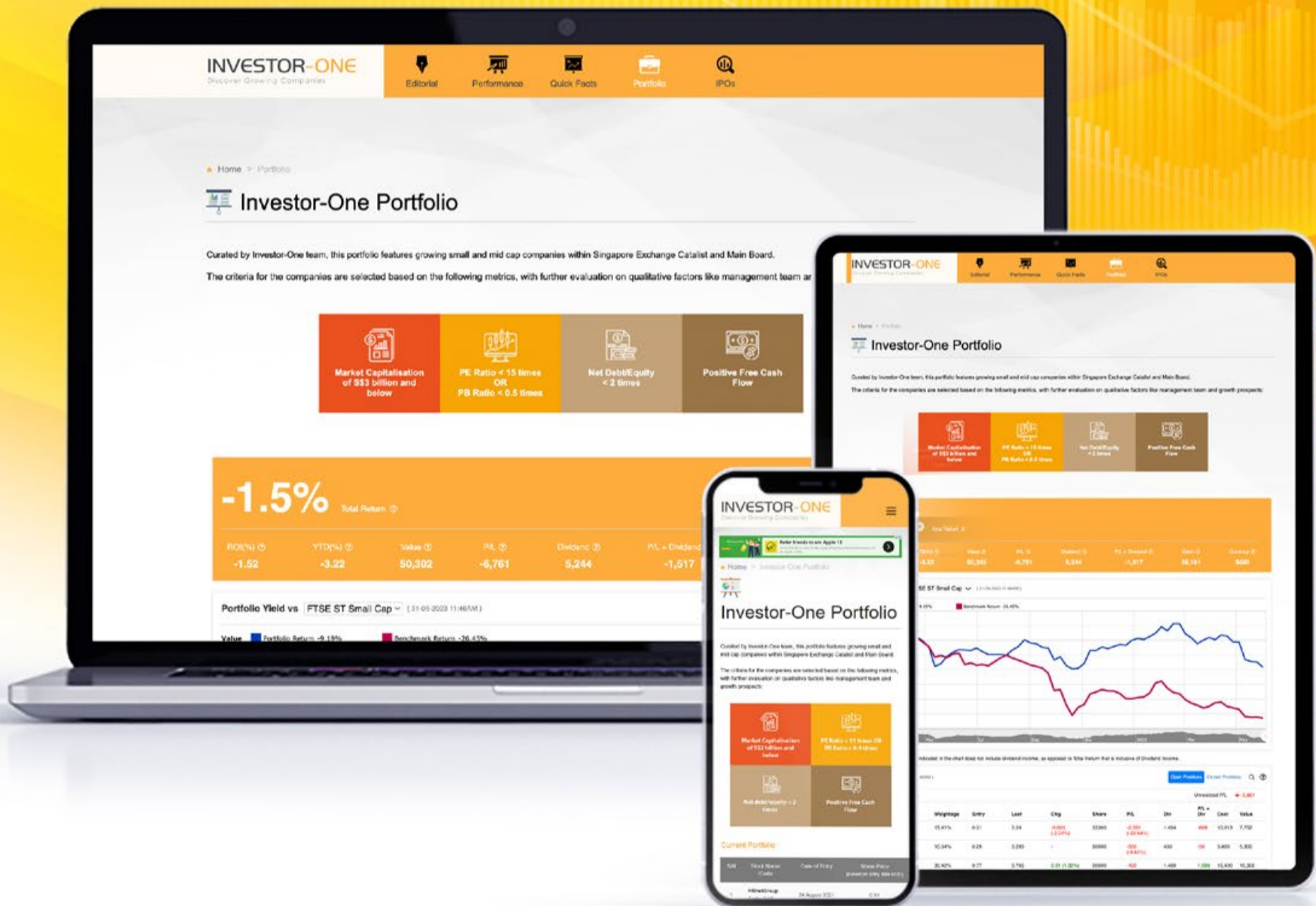
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INVESTOR-ONE PORTFOLIO

Curated and managed by the Investor-One team under ShareInvestor, this **free-to-access** portfolio will feature local small and mid-cap companies within Singapore Exchange's Mainboard and Catalyst.

Join us on the journey and watch as we manage a locally vested portfolio with a **fund of \$100,000**.



 **ENTER PORTFOLIO** >

Investor-One Portfolio

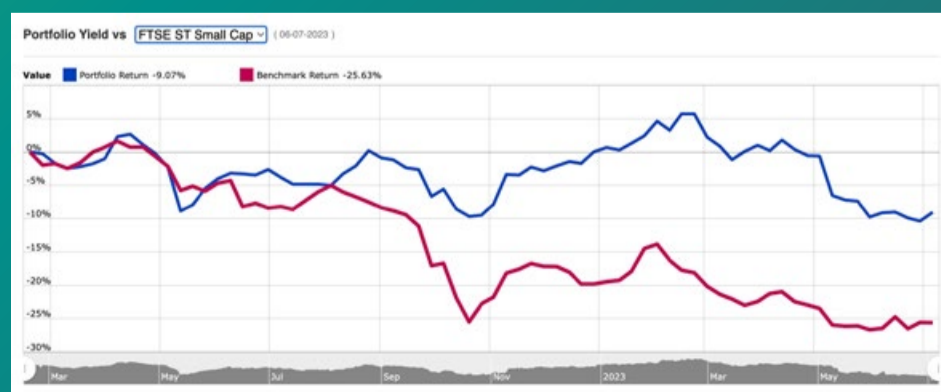
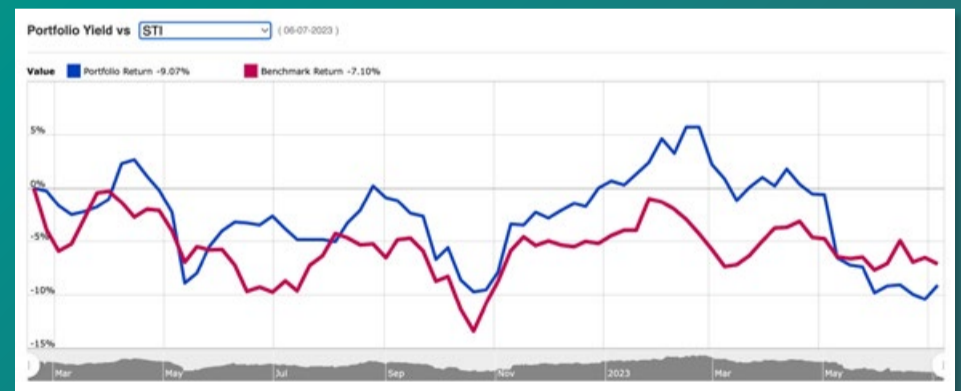
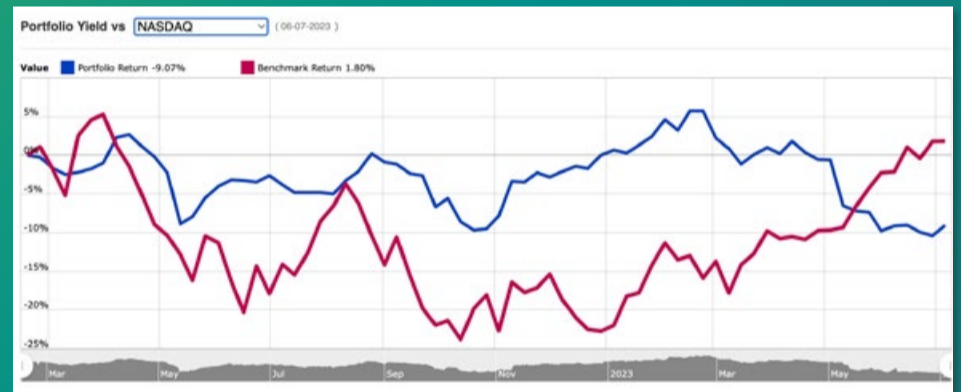
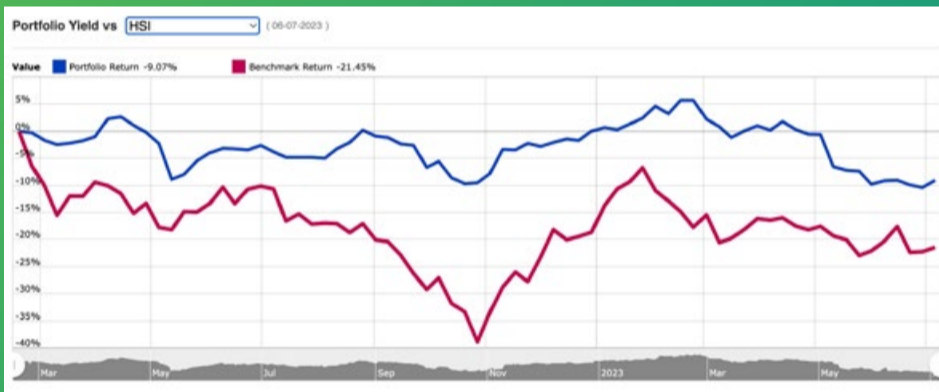
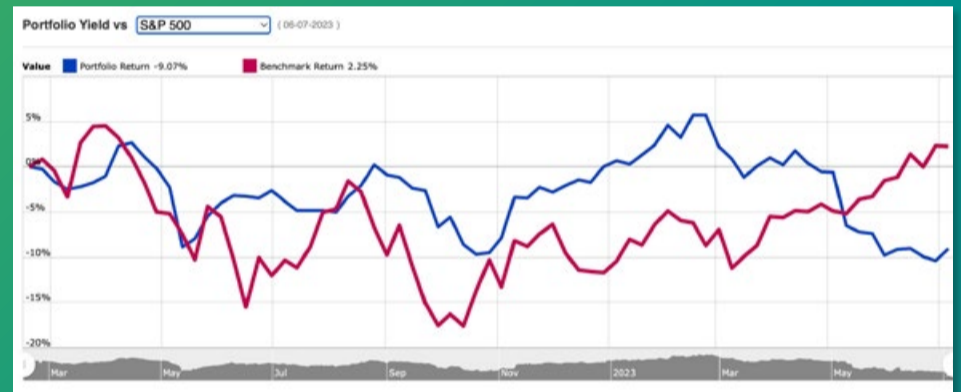
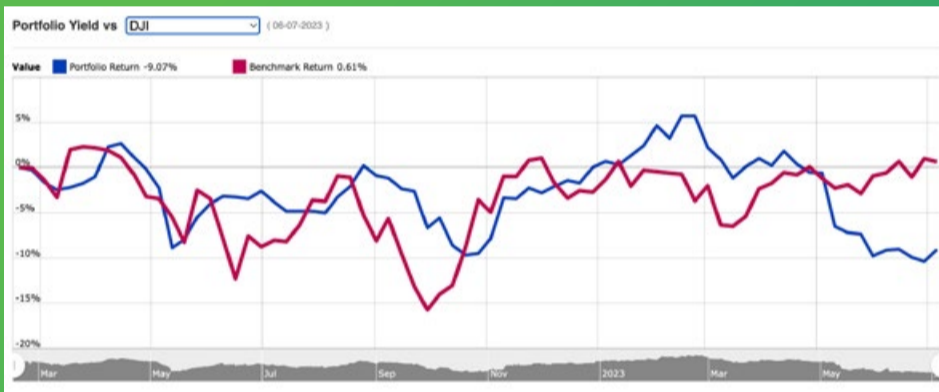
Curated by Investor-One team, this portfolio features growing small and mid cap companies within Singapore Exchange Catalist and Main Board.

The criteria for the companies are selected based on the following metrics, with further evaluation on qualitative factors like management team and growth prospects:

 <p>Market Capitalisation of S\$3 billion and below</p>	 <p>PE Ratio < 15 times OR PB Ratio < 0.5 times</p>
 <p>Net Debt/Equity < 2 times</p>	 <p>Positive Free Cash Flow</p>

-2.4% Total Return

ROI(%)	YTD(%)	Value	P/L	Dividend	P/L + Dividend	Cash	Currency
-2.41	-4.09	59,369	-7,707	5,300	-2,407	38,224	SGD



Note: The Portfolio Return indicated in the chart does not include dividend income, as opposed to Total Return that is inclusive of Dividend Income.

continued on next page...

INVESTOR-ONE

Discover Growing Companies

Summary (06-07-2023)

Open Positions

Unrealized P/L ↓ -4,807

Name↑	Weightage	Entry	Last	Chg	Share	P/L	Div	P/L + Div	Cost	Value
Geo Energy Res	12.51%	0.31	0.23	-	32300	-2,584 (-25.81%)	1,454	-1,131	10,013	7,429
Hock Lian Seng	9.26%	0.29	0.275	-	20000	-300 (-5.17%)	450	150	5,800	5,500
HRnetGroup	24.93%	0.77	0.74	-	20000	-600 (-3.90%)	1,400	800	15,400	14,800
Hyphens Pharma	23.58%	0.3	0.28	-	50000	-1,000 (-6.67%)	890	-110	15,000	14,000
JEP Hldgs	16.32%	0.31	0.3	-	32300	-323 (-3.23%)	-	-323	10,013	9,690
Kimly	5.64%	0.4	0.335	-	10000	-650 (-16.25%)	224	-426	4,000	3,350
Nordic	7.75%	0.395	0.46	-	10000	650 (16.46%)	283	933	3,950	4,600

Summary (06-07-2023)

Closed Positions

Realized Profit ↓ -2,900

Name↑	Avg Buy	Avg Sell	Shares	Comm	P/L	P/L + Div	Proceeds
HG Metal	0.375	0.34	10000	-	-350	50	3,400
InnoTek	0.735	0.48	10000	-	-2,550	-2,350	4,800

Transaction (06-07-2023)

Action	Stock	Price	Shares	Exchange Rate	Comm	Amount	Date↓	Notes
Buy	JEP Hldgs	0.310	32300	N/A	0.00	10,013	4 Jul 2023	-
Sell	HG Metal	0.340	10000	N/A	0.00	3,400	13 Mar 2023	-
Sell	InnoTek	0.480	10000	N/A	0.00	4,800	13 Mar 2023	-
Buy	Geo Energy Res	0.310	32300	N/A	0.00	10,013	13 Mar 2023	-
Buy	HRnetGroup	0.770	20000	N/A	0.00	15,400	16 Feb 2022	-
Buy	Kimly	0.400	10000	N/A	0.00	4,000	16 Feb 2022	-
Buy	HG Metal	0.375	10000	N/A	0.00	3,750	16 Feb 2022	-
Buy	InnoTek	0.735	10000	N/A	0.00	7,350	16 Feb 2022	-
Buy	Nordic	0.395	10000	N/A	0.00	3,950	16 Feb 2022	-
Buy	Hyphens Pharma	0.300	50000	N/A	0.00	15,000	16 Feb 2022	-
Buy	Hock Lian Seng	0.290	20000	N/A	0.00	5,800	16 Feb 2022	-
Cash	Deposit	-	-	N/A	-	100,000	15 Feb 2022	-

continued on next page...

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Dividend (06-07-2023)

YTD

SGD 2841.10

TRAILING 12 MONTHS

SGD 3383.30

2022

SGD 2459.20

Stock	Ex-Date	Payable Date	Amt	Amt(SGD)	Total
Kimly	27 Jun 2023	14 Jul 2023	SGD 0.0056	0.0056	56
Geo Energy Res	29 May 2023	08 Jun 2023	SGD 0.0050	0.0050	161.50
Hyphens Pharma	09 May 2023	24 May 2023	SGD 0.0111	0.0111	555
Geo Energy Res	08 May 2023	17 May 2023	SGD 0.0400	0.0400	1292
Hock Lian Seng	07 May 2023	19 May 2023	SGD 0.0100	0.0100	200
Nordic	07 May 2023	17 May 2023	SGD 0.0091	0.0091	90.60
HRnetGroup	03 May 2023	12 May 2023	SGD 0.0187	0.0187	374
Kimly	26 Jan 2023	08 Feb 2023	SGD 0.0112	0.0112	112
HRnetGroup	28 Aug 2022	06 Sep 2022	SGD 0.0213	0.0213	426
Nordic	16 Aug 2022	02 Sep 2022	SGD 0.0116	0.0116	116.20
Kimly	29 Jun 2022	15 Jul 2022	SGD 0.0056	0.0056	56
Hyphens Pharma	11 May 2022	25 May 2022	SGD 0.0067	0.0067	335
InnoTek	10 May 2022	25 May 2022	SGD 0.0200	0.0200	200
Hock Lian Seng	08 May 2022	20 May 2022	SGD 0.0125	0.0125	250
HRnetGroup	08 May 2022	18 May 2022	SGD 0.0300	0.0300	600
Nordic	05 May 2022	17 May 2022	SGD 0.0015	0.0015	15.20
Nordic	05 May 2022	17 May 2022	SGD 0.0061	0.0061	60.80
HG Metal	05 May 2022	20 May 2022	SGD 0.0400	0.0400	400

This portfolio is managed by Investor-One research team, under ShareInvestor.

Disclaimer:

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4. Purchase Price and Exit Price are based on EOD price.
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Investor-One Portfolio: Updates for June 2023

Vincent Wong, Investor-One / Thu, Jul 6, 8:00 AM

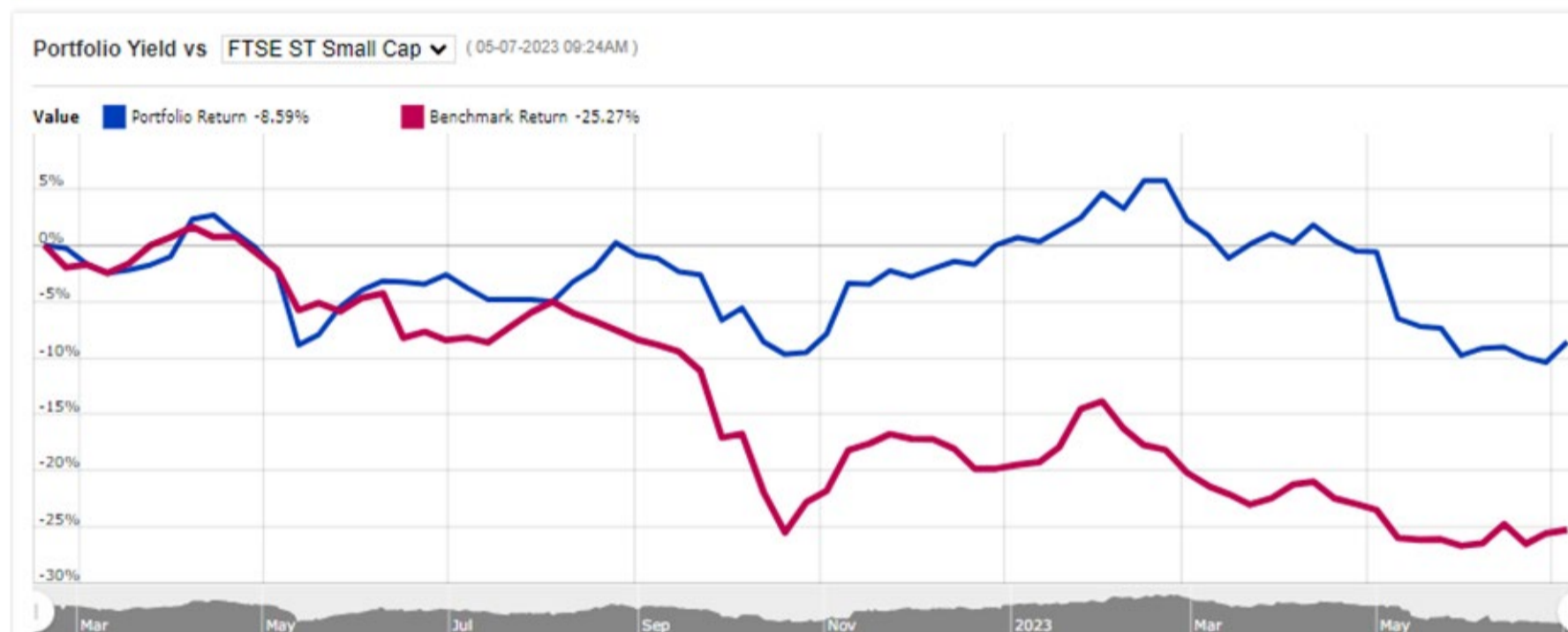


Portfolio Performance

-2.1%

Total Return ⓘ

ROI(%) ⓘ	YTD(%) ⓘ	Value ⓘ	P/L ⓘ	Dividend ⓘ	P/L + Dividend ⓘ	Cash ⓘ	Currency ⓘ
-2.06	-3.75	59,719	-7,357	5,300	-2,057	38,224	SGD



Since inception, the overall return is -2.1%, with dividends. If you take the dividends out of the equation, we've seen an 8.6% decrease in returns. However, that's way better than our comparable benchmark, which fell by 25.3% during the same time. Also, keep in mind that we only used half of our available cash. We did this on purpose so we would have enough money left when good opportunities come along.

New Addition: JEP Ltd

Our i-One Portfolio is adding a new stock to its lineup: JEP Ltd. This company, which is heavily involved in the aerospace engineering business, looks like it could give us strong returns. Here's why:

continued on next page...

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- **Aerospace industry rebound:** With the recovery of air travel after the pandemic, industries like aerospace engineering could start doing better. Together with their new factory in Malaysia running in near future, JEP Ltd might see some nice growth soon.

- **Strong finances:** In the last few years, JEP Ltd has really strengthened its financial situation. This gives the company a solid base to build on and makes it an attractive option for investors.

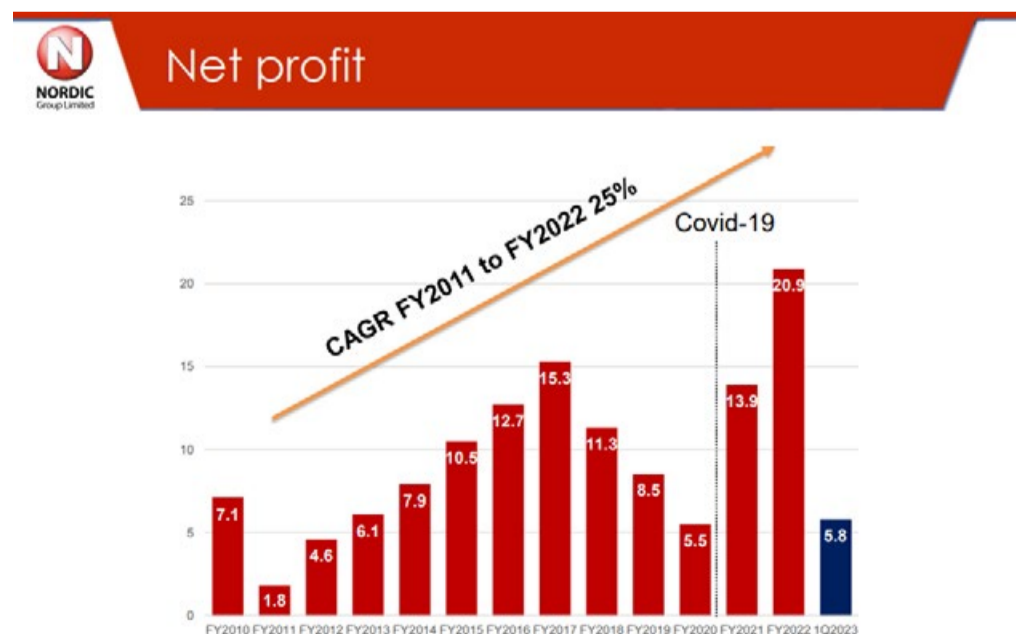
- **Insider Buying:** The Executive Chairman and CEO of the company has put a lot of his own money into the company's stock. There are many reasons why directors will sell their companies' stock, but there's only one reason when they buy them with their own money. When someone inside the company is that confident, it makes us feel pretty good about investing in it, too.

On a closing note, I'm planning to dig deeper into JEP Ltd in an upcoming article. I'll delve into more details of their operations, financials, and outlook. If you're interested in this, make sure to subscribe to Investor-One. You can do this via email or Telegram, and it will keep you in the loop on this and other investment opportunities.

Nordic

In a recent voluntary business update for the first quarter of 2023, the Nordic Group has once again demonstrated its ability to weather fluctuating market conditions.

Historically, the stable gem within the small-to-mid-cap companies in SGX has been consistently turning over impressive results, delivering a Compound Annual Growth Rate (CAGR) of 25% from FY2011 to FY2022.



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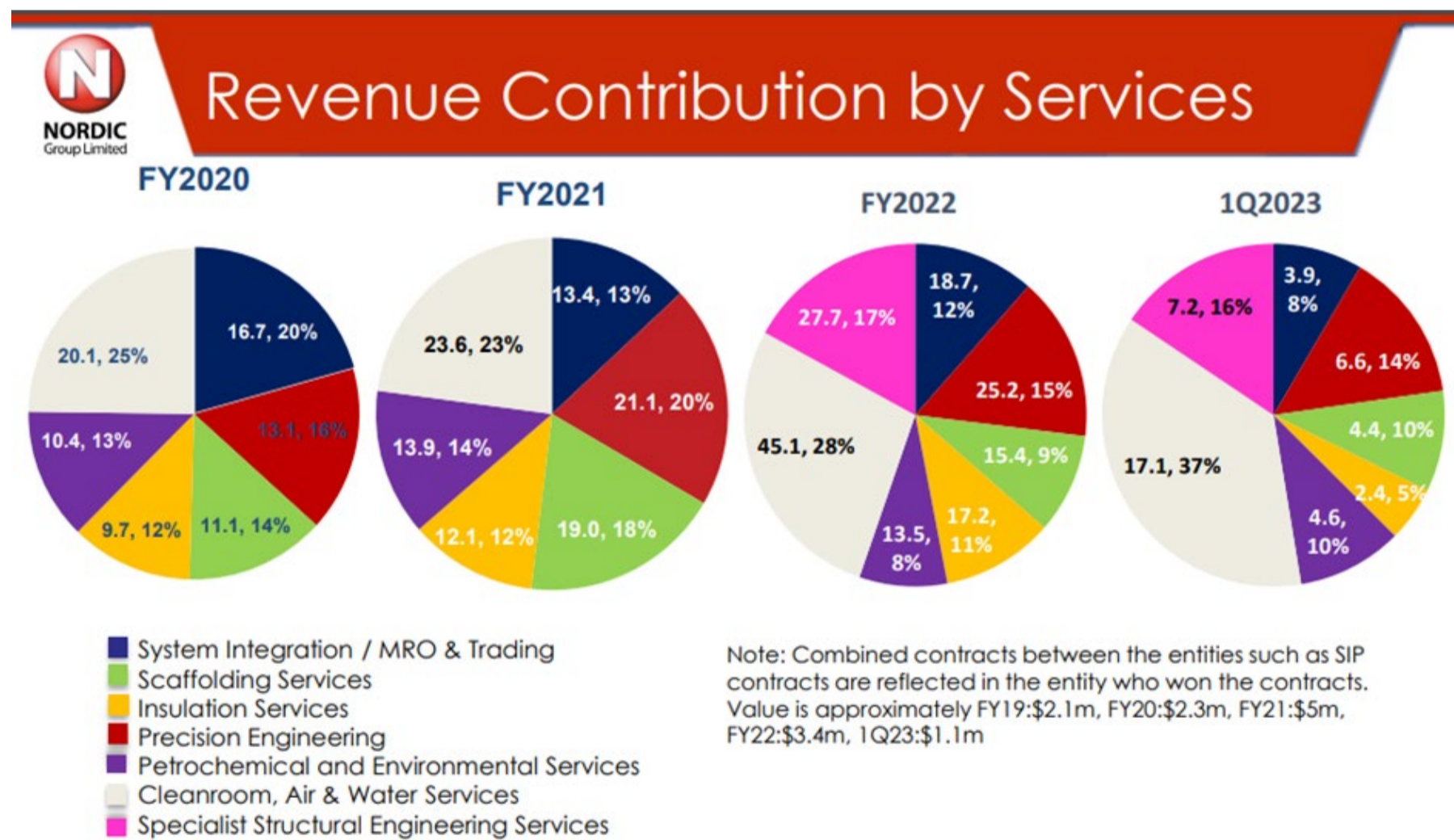
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This feat has been achieved without a single period of financial loss through both bullish and bearish periods for both equity and commodity markets, a noteworthy accomplishment given some cyclical businesses the company is in. Such steadiness could be attributed to Nordic's well-diversified business model spanning multiple industries.

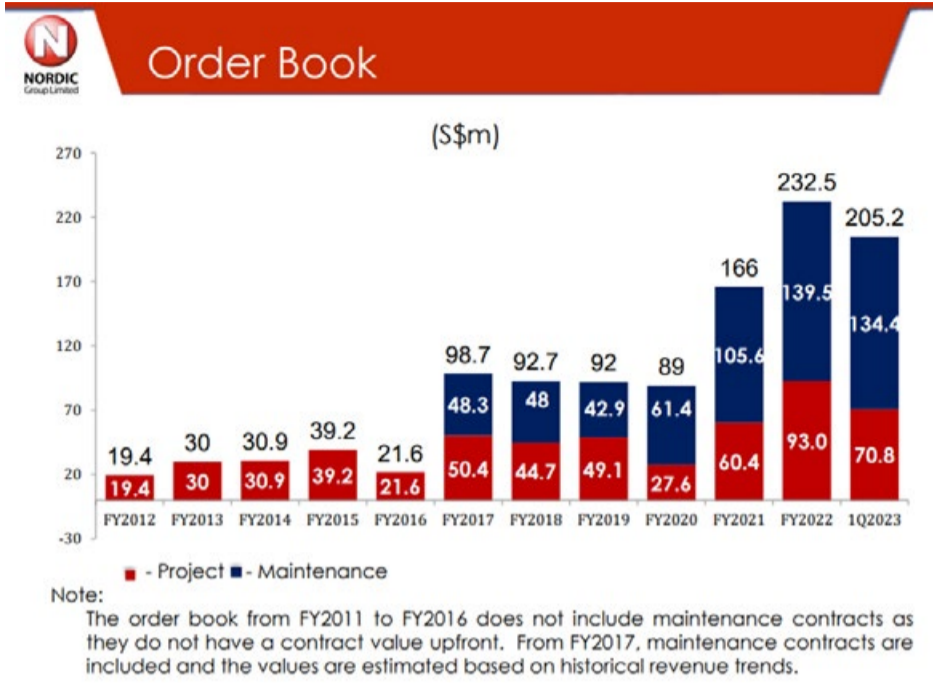


Nordic ensures that downturns in one business can be offset by upswings in another. In the charts below from its 1Q2023 business update, you could clearly observe the company effort to diversify its operations to a well-balance portfolio:



However, the company's performance in Q1 2023 hasn't been entirely smooth sailing. Nordic's order book has experienced a slight decline. While some may perceive this as a concern, it's worth noting that such fluctuations could be driven by seasonal factors.

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Taking into account Nordic Group's track record of consistent profitability, diversified

business model, and its resilience in bull and bear markets. We are more than happy to retain it in our portfolio holdings. This decision is based on our belief in its long-term viability as a robust investment.

Interested in discovering and uncovering more about high-quality mid-cap stocks like JEP Ltd and Nordic? Keep an eye out. We're crafting in-depth analyses of these companies. To keep these insights at your fingertips, subscribe and share our updates!

SHAREINVESTOR WEBPRO **C² CHART**

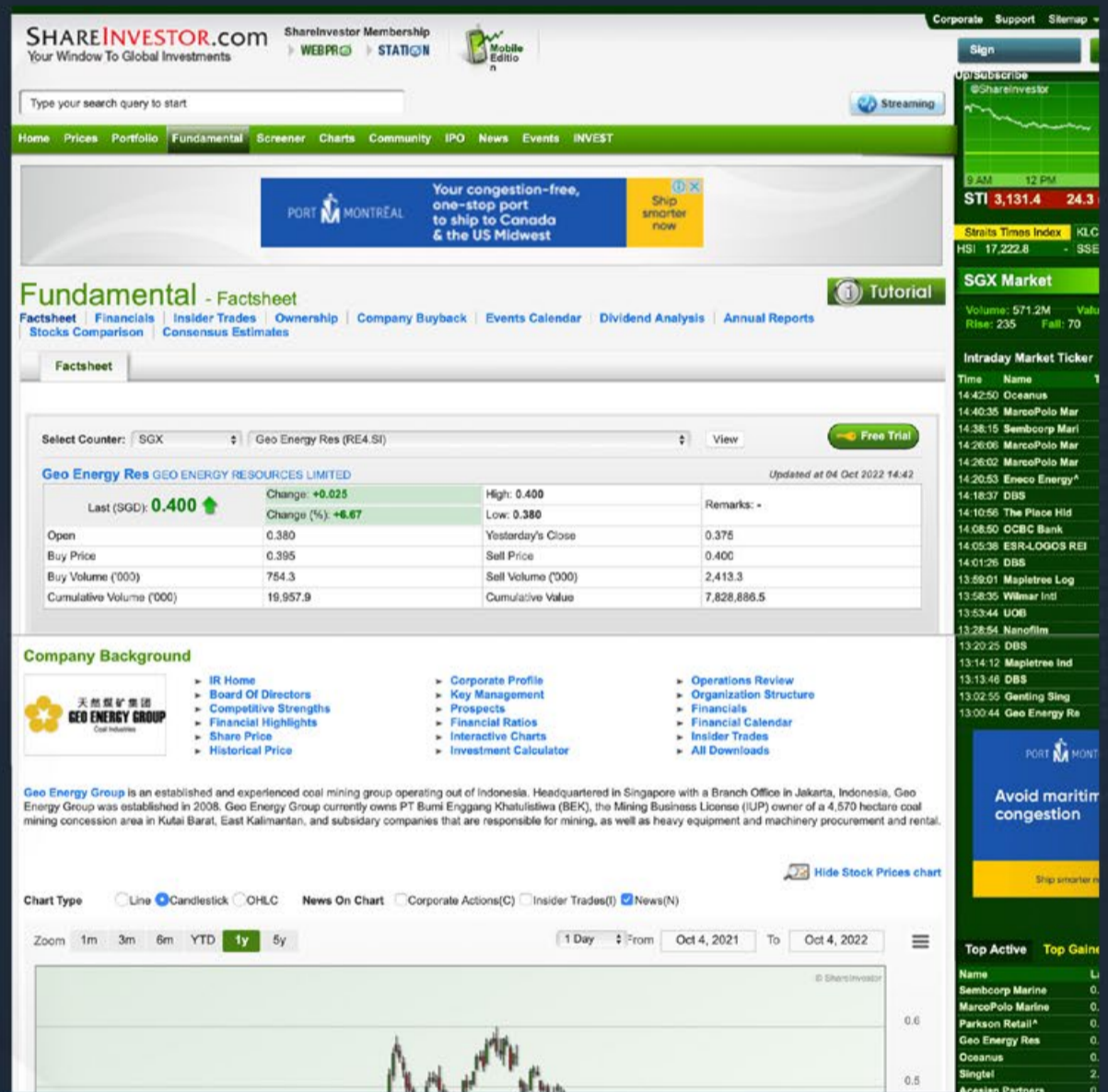
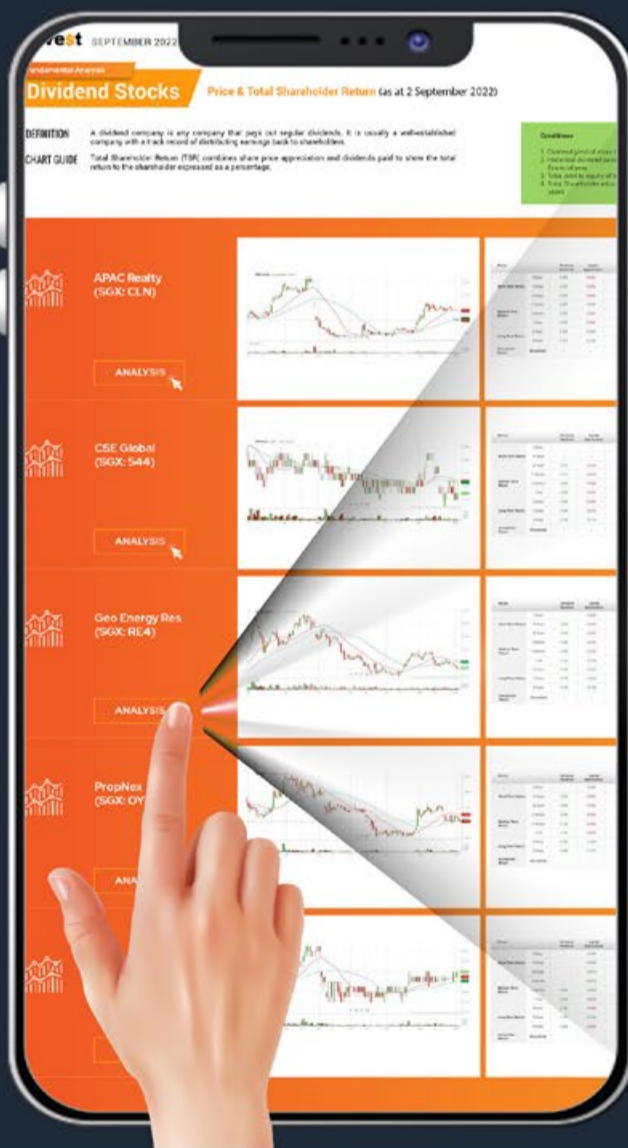
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COMPANY SPOTLIGHT

Comparing 3 "Gloves Stocks" in SGX

Vincent Wong, Investor-One / Wed, Jun 28, 5:00 PM



The global pandemic led to a massive spike in demand for protective gear, including gloves, leading to a surge in production, particularly from manufacturers in China. This increased production eventually led to oversupply, driving down prices and impacting profitability across the sector. Stock performance typically mirrors company performance, hence the negative impact extended to stock prices as well. The effects are visible on SGX, home to glove manufacturers like Riverstone, Top Glove, and UG Healthcare. We present an evaluation of these companies' revenue, liquidity, profitability, and free cash flow in this turbulent market.

Latest Full Year Financials ('000)	Riverstone	Top Glove	UGHealthcare
Period	Full Year Dec 2022	Trailing 12M May 2023	Trailing 12M Dec 2022
Revenue	383,774	837,217	171,219
Profit Before Tax (Include Exceptional Items)	127,061	(150,528)	13,539
Profit Attributable To Shareholders	95,797	(161,097)	10,771
Cash And Cash Equivalents At End	324,829	114,659	76,858
Free Cash Flow	75,673	(41,167)	(12,653)

Of the 3 companies, Top Glove is the largest in scale among them in terms of revenue. TTM, only Riverstone has a positive Free Cash Flow (FCF) of

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continued... [Comparing 3 "Gloves Stocks" in SGX]

S\$76 million. Another thing to note is that although Riverstone's revenue was less than half of Top Glove, the former has S\$325 million in cash, which is significantly more than Top Glove's S\$ 115million.

Valuation Ratios		Riverstone	Top Glove	UGHealthcare
<u>Price Earnings Ratio (PER) - Adjusted</u>	■■	9.52	n.m.	9.04
<u>Trailing PER</u>				
<u>Price/NAV - Adjusted</u>	■■-	1.6145	1.2936	0.4553
<u>Price/NTA - Adjusted</u>	■■-	1.6145	1.6049	0.4564
<u>Price/Revenue - Adjusted</u>	■■-	2.375	2.343	0.568
<u>Price/Operating Cash Flow - Adjusted</u>	■■■	7.836	27.201	24.202
<u>Price/Free Cash Flow - Adjusted</u>	■■-	12.046	n.m.	n.m.
<u>Dividend Yield - Adjusted</u>	■■-	12.882	-	2.051
<u>Dividend Payout Ratio - Historical</u>	■■-	1.226	-	0.185
<u>Dividend Payout Ratio Incl Special Dividend - Historical</u>	■■-	1.603	-	0.371

In the current trading price, Riverstone has a price-to-earnings (P/E) ratio of 9.5, closely trailed by UG Healthcare's 9. Top Glove is currently nursing losses. Despite the sector-wide struggles, Riverstone has stayed profitable and boasts an enticing 12% dividend yield, owing to its unconventional 160% payout ratio. In stark contrast, UG Healthcare's returns are less fruitful, offering a mere 2% yield on a conservative 18% payout ratio.

The way the market values Riverstone and Top Glove seems to be similar. We can see this when we look at their Price/Revenue ratios. This ratio gives us an idea of how much investors are willing to pay for each dollar a company makes in sales. Both companies have about the same ratio, which means investors see them as equally attractive based on their sales.

The same trend shows up when we look at the Price/Net Assets Value ratios. This ratio helps us understand how much investors are willing to pay for the assets a company owns. Again, Riverstone and Top Glove have similar ratios, while UG Healthcare's ratio is lower, indicating that it may be undervalued when considering its tangible assets.

the market might be valuing UG Healthcare less than Riverstone and Top Glove for a reason. Firstly, UG Healthcare is a smaller company with a shorter history. Investors often feel more confident in larger, established companies because they've been around for a while and have a proven track record.

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continued... [Comparing 3 "Gloves Stocks" in SGX]

Secondly, the liquidity of trading for UG Healthcare's shares on the SGX is not as fluid. This means it might be harder for investors to buy or sell shares when they want to, which could make the stock less attractive to more established investors.

Management Efficiency Ratios		Riverstone	Top Glove	UGHealthcare
Return On Assets (ROA)	■	15.566	n.m.	4.170
Return On Equity (ROE)	■	16.968	n.m.	5.039
Cash Earnings Return On Equity	■	24.731	n.m.	7.877

Efficiency-wise, Riverstone leads in all efficiency and profitability ratios, highlighting its effective use of assets and equity as well as product differentiation. The financial struggles of Top Glove leave it unmeasurable on these metrics.

Riverstone's higher ROA, ROE, and Cash Earning's ROE ratios suggest it is more efficiently using its resources to generate profits. In addition, Riverstone can bring in more cash earnings with the same amount of investor money compared to its competitors. This is a good sign and it's something that investors usually like to see.

Profitability Ratios		Riverstone	Top Glove	UGHealthcare
Gross Profit (Earnings) Margin	■	35.753	-18.631	26.849
Pretax Margin	■	33.108	-17.980	7.907
Net Profit (Earnings) Margin	■	24.962	-19.242	6.291

Riverstone stands out because it specializes in making a specific type of glove known as 'cleanroom gloves'. These gloves are used in places that need to be very clean, like labs or hospitals, and they must meet higher standards compared to regular gloves.

Because cleanroom gloves are special and not everyone can make them, Riverstone might be able to charge more for their product. This is different from the gloves made by Top Glove and UG Healthcare, which are more common and easier to make. When a product is easy to make, there can be lots of competition, and that can drive the price down - this is what we call a 'commoditized' product.

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continued... [Comparing 3 "Gloves Stocks" in SGX]

So, Riverstone's focus on making a specialized, high-standard product gives them an edge and could be the reason behind their higher margin and better ROE.

Leverage Ratios	Riverstone	Top Glove	UGHealthcare
Debt To Net Profit	-	n.m.	2.193
Debt To Cash Flow	-	2.660	5.874
Interest Coverage	17160.286	n.m.	18.138
Net Debt To Equity	Net Cash	Net Cash	Net Cash
Total Debt To Equity	-	0.127	0.111
Debt To Assets	-	0.086	0.091
Liquidity Ratios	Riverstone	Top Glove	UGHealthcare
Current Ratio	12.034	1.674	7.760
Cash Ratio	10.047	0.395	3.286

Riverstone and UG Healthcare emerge with commendable liquidity positions. These companies have substantial cash reserves, which puts them in an advantageous position to cover their outstanding debts and manage financial obligations even during challenging times.

While Top Glove's cash ratio may not rival that of Riverstone and UG Healthcare, the company remains competent in maintaining its operations. It's worth noting that a slightly lower cash ratio does not necessarily equate to a precarious financial state; rather, it may simply imply a different capital structure or management strategy.

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MONTHLY MARKET WRAP: US DEBT CEILING CONCERNS EASED TO BE REPLACED BY INFLATION AND INTEREST RATE CONSIDERATIONS

US debt ceiling worries replaced by inflation and interest rate considerations

The month started with markets heaving a sigh of relief that the US government had managed to raise its debt borrowing ceiling, concerns over which had capped Wall Street's rises for several weeks whilst pushing inflation and interest rate considerations to be background.

However, the month ended with inflation, interest rates and the possibility of an economic slowdown very much at the forefront. This came after US Federal Reserve chair Jerome Powell said on Wednesday last week that the central bank is leaving open the possibility of consecutive interest rate hikes in the months ahead, to cool the economy further.

US Fed chief Jerome Powell left door open for more rate hikes

"We believe there's more restriction coming," Mr Powell told a central banking conference in Portugal on Wednesday.

"I wouldn't take, you know, moving to consecutive meetings off the table at all," he said.

Mr Powell said that US monetary policy will likely take more time to act against high inflation and bring it down to the Fed's long-term target of 2 per cent.

Earlier in the month, the Fed had paused its aggressive cycle of rate increases after 10 consecutive hikes, to give policymakers more time to weigh the effects of existing moves on inflation. At the same meeting, a majority of members on the Fed's rate-setting committee indicated that they see interest rates rising twice more before the end of the year.

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continued... [Monthly Market Wrap: Us Debt Ceiling Concerns Eased To Be Replaced By Inflation And Interest Rate Considerations]

However, the Federal Reserve's preferred measure of inflation, the core personal-consumption expenditures price index, declined more than expected in May, helping push stocks higher in the session.

"This is excellent news on the inflation fight. If you don't believe disinflation is happening, you aren't paying attention," Jamie Cox, managing partner for Harris Financial Group, wrote on Friday.

For the month, the STI added 1.5%; for the first half it was down 1.4%

For the month, the Straits Times Index added 47 points or 1.5% at 3,205.91. For the first half, the index recorded a loss of 46 points or 1.4%.

Singapore's market cap rose 1.6% in June to S\$804.7b

The market capitalisation of the 629 companies listed on the Singapore Exchange rose 1.6% in June to S\$804.7b. The market cap of the 30 STI component stocks rose 2.8% to S\$538.4b, which is about 67% of the whole market.

This was partly due to a change in the constituents as Keppel DC Reit was replaced by Seatrium. Keppel DC Reit has a market cap of S\$3.7b versus Seatrium's S\$8.5b.

The biggest gain in market cap was recorded by electric vehicle maker Nio, whose market value grew S\$4.4b to S\$21.3b. This was followed by DBS, which added S\$3.1b to S\$81.4b, making it the largest stock in the market.

The first half's largest gain was recorded by Singapore Airlines, whose market value rose S\$5.9b to S\$21.3b. Its shares added 29.3% in the first half to close at S\$7.15.

Economists flag risk of technical recession after 10.8% contraction in May's manufacturing output

Singapore's manufacturing output contracted for an eighth straight month in May. The slump was deeper than expected, putting the economy at higher risk of a technical recession.

continued... [Monthly Market Wrap: Us Debt Ceiling Concerns Eased To Be Replaced By Inflation And Interest Rate Considerations]

Factory output last month fell 10.8 per cent from a year ago, the first double-digit contraction since November 2019 when it dropped 12.3 per cent.

It was also sharper than the median 7.3 per cent fall forecast by economists in a Bloomberg poll, and was steeper than April's 6.5% fall. Excluding the typically volatile biomedical cluster, factory output shrank 13% following April's 5.7% contraction.

RHB senior economist Barnabas Gan was quoted by the Business Times as saying Singapore faces heightened risk of a technical recession in 1H 2023 "following the annual contraction in externally-facing indicators".

Maybank economist Chua Hak Bin noted the persistent manufacturing downturn: "Singapore's manufacturing PMI (49.5 versus 49.7 in April) deteriorated for the third straight month in May" and also wrote about the increasing chance of a technical recession.

Similarly, UOB senior economist Alvin Liew, in noting that electronics has yet to find a bottom in the current cycle, also reiterated a "substantial risk" of a technical recession in the first half.

SGX RegCo working on new rules for independent financial advisers

The Straits Times on Thursday reported that the Singapore Exchange's regulatory arm SGX RegCo is working on new guidelines that will give much-needed clarity with regards to independent advice when it comes to privatisation offers.

The newspaper quoted an SGX spokesperson saying, "After considering market feedback and following engagement with relevant stakeholders, SGX RegCo intends to spell out shortly our expectations of directors when appointing independent financial advisers (IFAs) as well as of IFAs when arriving at their independent opinion".

Yangzijiang Shipbuilding was in play after several contact wins

Shares of China-based Yangzijiang Shipbuilding (YZJ) saw heavy trading on

continued... [Monthly Market Wrap: Us Debt Ceiling Concerns Eased To Be Replaced By Inflation And Interest Rate Considerations]

Tuesday onwards, following an announcement that it has secured several sizeable contracts.

On Sunday, the company announced it has been awarded a contract from Norway-based Klaveness Combination Carriers ASA for the construction of three 83,300 DWT third generation CABU vessels, due for deliveries in 2026.

On Monday, YZJ announced that it has secured a contract to build six 9,000 TEU (twenty-foot equivalent) methanol dual-fuel containerships from Maersk.

On Tuesday YZJ said it had secured orders for 37 more vessels. "With these latest order wins, year-to-date, the Group has secured new orders for 69 vessels worth approximately US\$5.6 billion, exceeding its year 2023 target of US\$3 billion, achieving the highest ever total outstanding orderbook value of US\$14.60 billion for 180 vessels" said YZJ.

DBS Group Research described the company's Q2 order wins as "mind-blowing" as the market had expected activity to slow down from last year amid a hefty order backlog.

"We surmise that the likelihood of them expanding current capacity and expediting delivery is increasing with the huge order intakes in Q2" said DBS. It has a "buy" on the stock with a target price of S\$1.70.

Citi's analysts were also positive on the stock, saying that the near-term outlook remains favourable and further order wins will drive a re-rating. It added that the year-to-date depreciation of the yuan could pose upside risk to YZJ's first half performance. Its target is S\$1.56.

The shares ended the week at S\$1.56, up S\$0.28 or 22% for the week.

Don Agro's shares closed 74% higher after announcement of sale of businesses

Shares of agricultural firm Don Agro, which is listed on Catalist, on Wednesday rocketed up S\$0.14 or almost 74% to close at S\$0.33 on

continued... [Monthly Market Wrap: Us Debt Ceiling Concerns Eased To Be Replaced By Inflation And Interest Rate Considerations]

volume of 529,300 after the company announced it is proposing to sell its crop and milk production businesses.

Earlier that day, the stock hit an intraday high of S\$0.36. The last time it traded near these levels was in February 2022. The shares ended the week at S\$0.305.

Based in Russia, the company said its wholly-owned subsidiary JSC Tetra will dispose of between 99-99.99% of its stakes in four subsidiaries for 6.2b roubles or around S\$113m. These subsidiaries focus on crop and milk production.

Assuming the deal was completed on 31 Dec 2022, Don Agro said it would have raised the company's net tangible assets per share from S\$0.4846 to S\$1.0012 and its earnings per share to S\$0.4106 from a loss per share of S\$0.0118. The gain on disposal is expected to be 3,5b roubles.

Sabana Reit to vote on manager removal on 4 Aug

The extraordinary general meeting requisitioned by activist shareholder Quarz Capital to remove Sabana Reit's manager will be held between 2-4pm at Hope@New Tech Park on 4 Aug.

Quarz had called for the meeting to pass two resolutions, the first being to remove Sabana's manager as soon as possible. The second is to internalise the manager by incorporating a subsidiary wholly-owned by the trustee and appointing this subsidiary to act as the Reit's manager.

Quarz had earlier stated that internalising the manager would bring cost savings to the Reit and resolve corporate governance flaws. It said this would result in higher distribution per unit and a higher price for the Reit.

Sabana's manager and controlling shareholder ESR Group have warned that following through on Quarz's proposals could destroy value. ESR in a 25 June letter said a change in manager could constitute a breach of loan covenants.

TOP SIGNIFICANT INSIDER ACTIVITY



Data extracted from WebPro, accurate as at yesterday

Effective Change Date (Notice Date)	Stock Name	Buyer / Seller Name (Classification ^a)	Security Types ^b	Acquired / (Disposed) ['000]			Price	Closing Price ^d	No. of Shares After Trade ['000]			
				Direct	Deemed	Total			Direct	Deemed	Total	% Held ^c
03 Jul 2023 (05 Jul 2023)	OTS Holdings	ONG BEE CHIP [Dir/CEO]	S/U		350	350	0.134	8,933	161,100	170,032	79.450	
03 Jul 2023 (05 Jul 2023)	OTS Holdings	ONG BEE SONG [SSH]	S/U		350	350	0.134		161,100	161,100	75.280	
03 Jul 2023 (05 Jul 2023)	OTS Holdings	BCS DEVELOPMENT PTE. LTD. [SSH]	S/U	350		350	0.134	160,380	720	161,100	75.280	
03 Jul 2023 (05 Jul 2023)	AEM SGD	abrdrn plc [SSH]	S/U		-266	-266	3.810		27,609	27,609	8.938	
03 Jul 2023 (05 Jul 2023)	AEM SGD	abrdrn Holdings Limited [SSH]	S/U		-266	-266	3.810		27,609	27,609	8.938	
05 Jul 2023 (05 Jul 2023)	JEP	Andy Luong [Dir/CEO]	S/U	150		150	0.300	2,885	305,037	307,922	74.550	
04 Jul 2023 (05 Jul 2023)	TSH	Chua Khoo Hui [Dir/CEO]	S/U	40		40	0.160	6,545		6,545	14.760	
30 Jun 2023 (05 Jul 2023)	IHH	EMPLOYEES PROVIDENT FUND BOARD [SSH]	S/U	567		567	1.680	896,524		896,524	10.180	
30 Jun 2023 (05 Jul 2023)	Venture	Wong Chee Kheong [Dir/CEO]	R/O/W	14		14	14.710					
30 Jun 2023 (05 Jul 2023)	Venture	Wong Chee Kheong [Dir/CEO]	R/O/W	12		12	14.710					
30 Jun 2023 (05 Jul 2023)	Venture	Lee Ghai Keen [Dir/CEO]	R/O/W	14		14	14.710					
30 Jun 2023 (05 Jul 2023)	Venture	Lee Ghai Keen [Dir/CEO]	R/O/W	12		12	14.710					
04 Jul 2023 (04 Jul 2023)	Datapulse Tech ^a	Aw Cheok Huat [Dir/CEO]	S/U,R/O/W		19,610	19,610	0.094	10	41,922	41,932	18.733	
03 Jul 2023 (04 Jul 2023)	SATS	Mok Tee Heong Kerry [Dir/CEO]	R/O/W	288		288	2.580					
30 Jun 2023 (04 Jul 2023)	Venture	Wong Ngit Liong [Dir/CEO]	R/O/W	15		15	14.710					
30 Jun 2023 (04 Jul 2023)	Venture	Wong Ngit Liong [Dir/CEO]	R/O/W	14		14	14.710					
30 Jun 2023 (04 Jul 2023)	MediLifestyle	T2S Pte. Ltd. [SSH]	S/U	-10,467		-10,467	0.034	1,805		1,805	2.170	
30 Jun 2023 (04 Jul 2023)	MediLifestyle	Thong Soon Seng ("Mr. Thong") [SSH]	S/U		-10,467	-10,467	0.034		1,805	1,805	2.170	
27 Jun 2023 (04 Jul 2023)	MediLifestyle	T2S Pte. Ltd. [SSH]	D	12,245		12,245	0.045	12,272		12,272	14.740	
27 Jun 2023 (04 Jul 2023)	MediLifestyle	Thong Soon Seng ("Mr. Thong") [SSH]	D		12,245	12,245	0.045		12,272	12,272	14.740	
04 Jul 2023 (04 Jul 2023)	IFAST	Wong Tin Niam Jean Paul [Dir/CEO]	R/O/W	37	11	48	4.530					
03 Jul 2023 (04 Jul 2023)	IREIT Global SGD	Cher Mui Sim Susanna [Dir/CEO]	R/O/W	4		4	0.425					
03 Jul 2023 (04 Jul 2023)	IREIT Global SGD	Lim Kok Min, John [Dir/CEO]	R/O/W	90		90	0.425					
03 Jul 2023 (04 Jul 2023)	IREIT Global SGD	Bruno de Pampelonne [Dir/CEO]	R/O/W	56	57	113	0.425					
04 Jul 2023 (04 Jul 2023)	Challenger	Ng Chee Weng [Dir/CEO]	S/U	-18		-18	0.600					
04 Jul 2023 (04 Jul 2023)	ChinaKundaTech	Cai Kaoqun [Dir/CEO]	S/U	4,050		4,050	0.012	4,050	123,084	127,134	31.030	
04 Jul 2023 (04 Jul 2023)	Beng Kuang ^a	Yong Jiunn Run [Dir/CEO]	S/U	100		100	0.070	8,100		8,100	4.070	
28 Jun 2023 (04 Jul 2023)	IHH	EMPLOYEES PROVIDENT FUND BOARD [SSH]	S/U	400		400	1.720	895,957		895,957	10.173	
03 Jul 2023 (04 Jul 2023)	Union Steel	Ang Yew Chye [Dir/CEO]	S/U	8		8	0.805	4,220		4,220	10.720	
03 Jul 2023 (04 Jul 2023)	Low Keng Huat	JIMMY YIM WING KUEN [Dir/CEO]	S/U		-120	-120	0.370		200	200	0.027	

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IR Announcements



ISOTeam: To Raise Up To S\$10.3 Million From Rights Issue To Support Higher Level Of Business Activities.

Proceeds from proposed rights issue will strengthen the Group's financial position and provide flexibility for its working capital needs. Increases the Group's ability to seize opportunities for business growth and expansion at the opportune time.

<http://isoteam.listedcompany.com/news.html/id/2446297>

Yangzijiang: Secures Order For 6 Methanol Dual-Fuel Containerships From Maersk, Its First In Terms Of Vessel Type.

First order win for methanol dual-fuel containerships. To deliver 6 9,000TEU methanol dual-fuel containerships from 2026 onwards. Appetite for green fleet renewal remains strong industry-wide following IMO regulatory changes, Yangzijiang stands to benefit due to technological capabilities.

<http://yangzijiang.listedcompany.com/news.html/id/2446291>



Yangzijiang Shipbuilding (Holdings) Ltd.
 扬子江船业(控股)有限公司



Stamford Tyres: Reports Full Year Net Profit Of S\$4.2 Million.

Stamford Tyres Corporation Limited announced a net profit of \$4.2 million for FY23 compared to \$3.9 million for FY22. Gross profit margin was lower at 26.7 per cent in FY23 compared to 27.4 per cent in FY22, mainly due to higher cost of tyres and wheel production. The Group recorded revenue of \$188.3 million which was 1.0 per cent lower than FY22 at \$190.3 million, mainly due to lower sales in Australia, offset by higher sales in South East Asia.

<http://stamfordtyres.listedcompany.com/news.html/id/2446484>

HRnetGroup: Contract Win, RecruitFirst Signs 2-Year Contract With Gardens By The Bay.

HRnetGroup Limited's Singapore subsidiary RecruitFirst Pte Ltd which specializes in flexible staffing services, has successfully secured a further two-year contract from June 2023 to May 2025 for the hiring of temporary staff for Gardens by the Bay in Singapore. First opened in 2012, Gardens by the Bay is an oasis of lush greenery in the city centre, known for its iconic Supertrees and cooled conservatories, Flower Dome and Cloud Forest.

<http://hrnetgroup.listedcompany.com/news.html/id/2446490>



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CAREER WITH US

ShareInvestor Singapore is a technology company with offices in the region. The company provides Online Investor Relations and Corporate Website Design services to public listed companies (B2B). It also offers Subscription (SAAS) and Investor Education to retail investors (B2C). More information about the company can be found at www.shareinvestorholdings.com. We are looking for a suitably experienced, matured and dynamic candidate to join our Singapore operations.

Position:
Sales Manager
*Online Investor Relations
& Website Design*

Job Responsibilities

Reporting to the Director - Investor Relations, you will be:

- Responsible for the full sales cycle from initial client contact to presentation, contract negotiation and closing of sales.
- Responsible for identifying new clients and very comfortable with making calls for sales presentations.
- Assigned to manage existing client accounts and maintain excellent relationships for contract renewals and to up-sell new business solutions.
- Required to meet and exceed Quarterly & Annual sales targets and KPIs.
- Coordinating internal resources for service delivery and monitor clients' satisfaction to ensure quality of service fulfilment.
- Working as part of a dynamic sales team where high performance will be highly rewarded.

Job Requirements

- Minimum 3-5 years of working experience in sales with strengths in writing, pitching, negotiating & closing sales.
- Degree/Diploma in any discipline.
- Knowledge in Investor Relations (IR) and/or Public Relations (PR) will be an advantage.
- Independent and career minded.
- Results oriented and performance driven.
- Possess good interpersonal and communication skills.

Compensation scheme

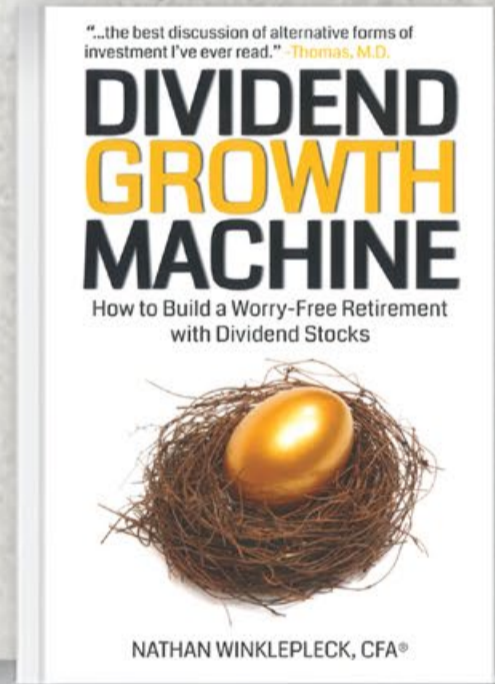
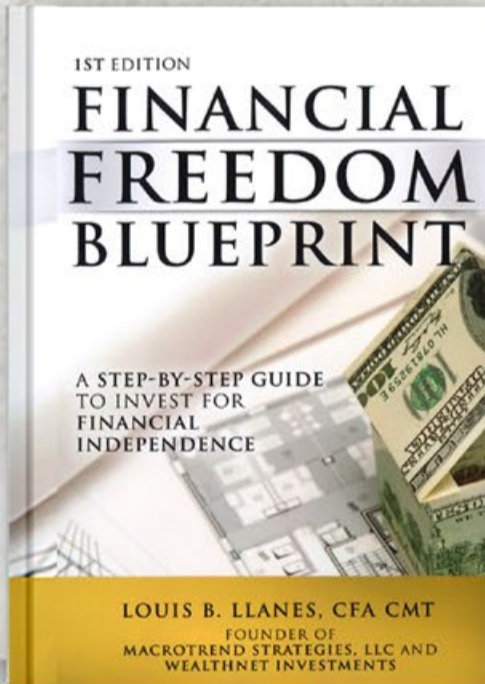
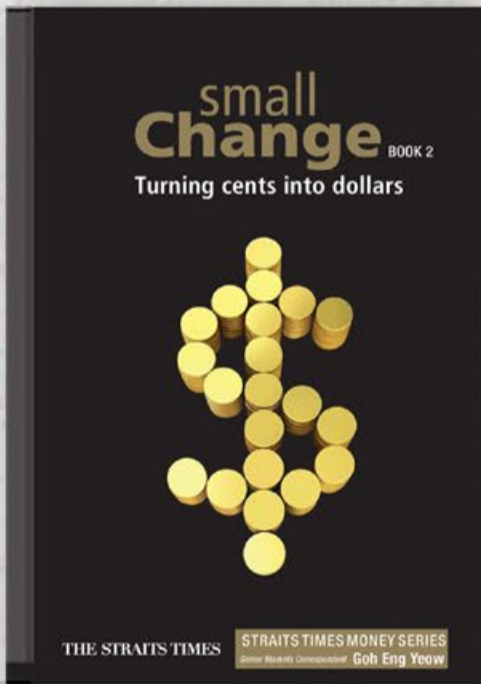
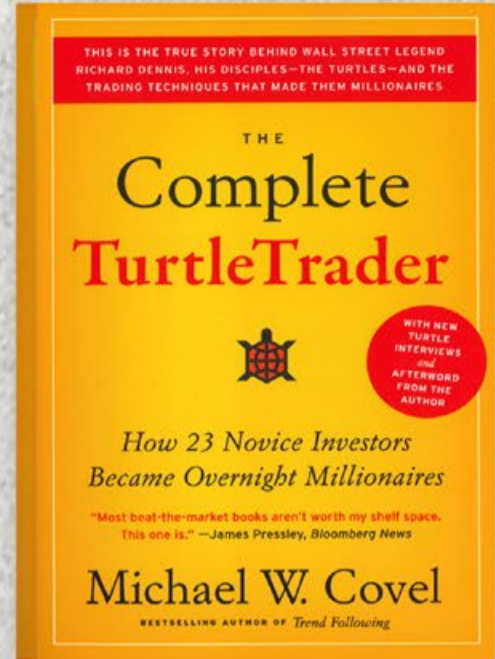
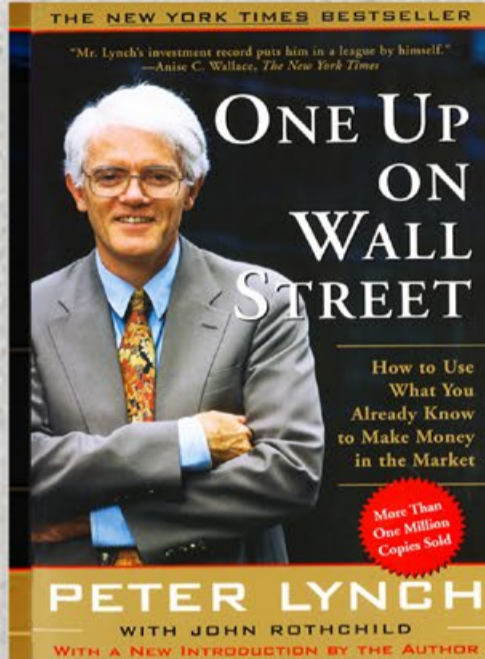
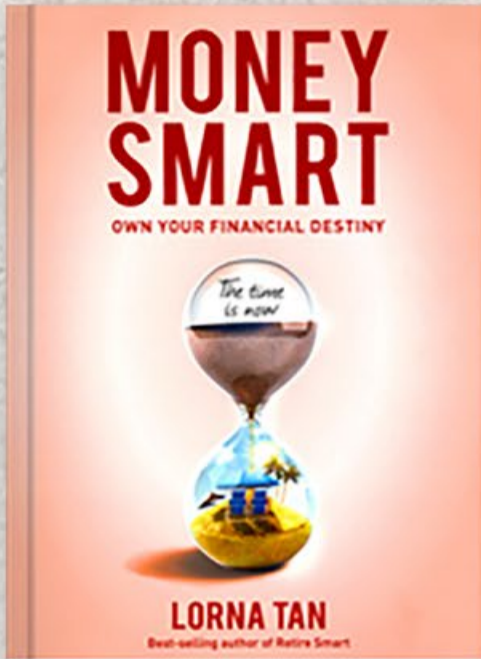
- Hybrid working arrangement: Work from home option on Mondays or Fridays (*but subject to change by management*).
- Attractive basic salary, incentive scheme plus entertainment, travelling & mobile phone allowance.
- Annual performance review with opportunity for career advancement.
- Opportunity to collaborate with colleagues from other ASEAN countries and cultures.

If you are interested to apply, please send your updated resume, current and expected salary, and a recent photograph. Send your application via email to yanjing.zhao@shareinvestor.com before **30th July 2023**.

INVESTMENT BOOKS

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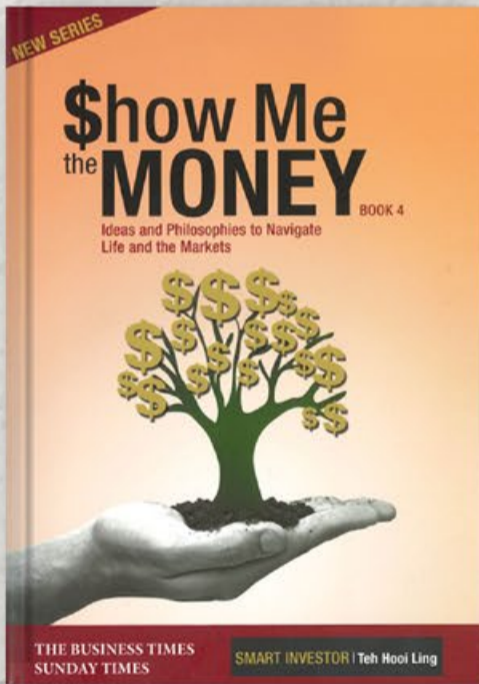
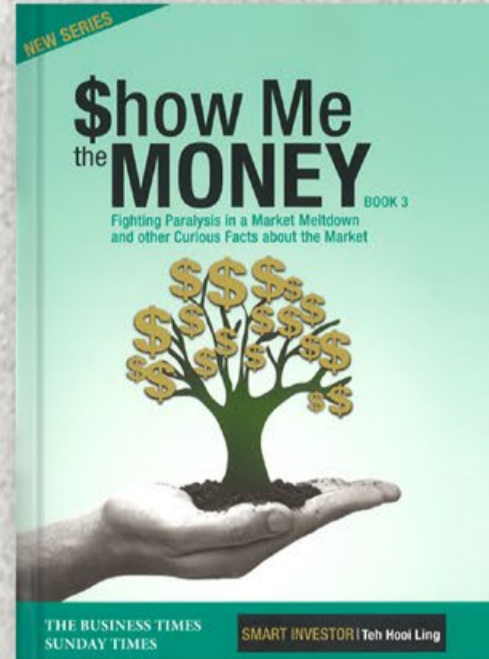
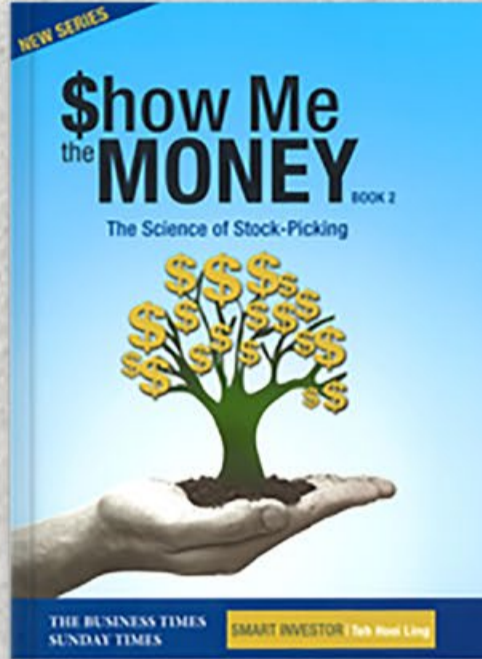
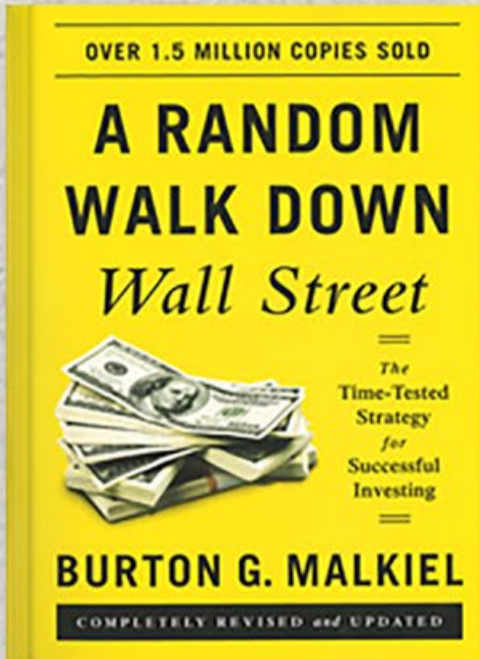


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