Inve$t

A Weekly e-Publication by SHAREINVESTOR

Data and Investing Ideas

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Via email, every Friday

COMPANY SPOTLIGHT

Market Underdogs With 52-Week Low That Deserve A Second Look

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Plus

COMPANY SPOTLIGHT: Temasek Holdings' Hidden Treasures: Stocks You Need To Know About

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Analyst Alert: Recommendation And Consensus On Lendlease Reit, Singtel, Sembcorp Ind, Genting Sing

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Market at a Glance

Over 5 trading days as at yesterday

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SHAREINVESTOR WEBPRO step-by-step GUIDE

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
HSI 20200MBePW250328	0.057	120,784.0
Yoma Strategic	0.093	118,717.4
Seatrium Ltd	2.550	108,213.8
HSI 25200MBeCW250627	0.092	71,375.0
YZJ Fin Hldg	0.520	53,050.4
MarcoPolo Marine	0.056	34,925.1
Katrina	0.048	28,596.5
HSI 23200MBeCW250328	0.085	27,647.9
ThaiBev	0.500	25,253.3
Memiontec Hldgs	0.044	24,970.5

Top Gainers
(over 5 Trading days as at yesterday)

Name	Last Done	5 Days Chg
GLD SG$	362.800	5.600
GLD US$	268.600	3.860
SPDR S&P500 US$	606.350	3.350
Nasdaq 7xLongUB250922	12.700	2.760
Sunny 5xLongSG250423	3.560	2.080
Sunny 5xLongUB250626	2.500	1.570
BYD 5xLongSG251216	2.500	1.560
XT MSCHINA S$	22.670	1.260
Alibaba 5xLongSG250924	2.180	1.235
META 3xLongSG261006	6.470	1.230

Top Losers
(over 5 Trading days as at yesterday)

Name	Last Done	5 Days Chg
TESLA 3xLongSG261006	8.260	-4.120
TESLA 3xLongSG261204US$	4.940	-3.560
NVDA 3xShortSG261204US$	5.580	-2.300
AMZN 3xLongSG261006	7.100	-1.180
NVDA 3xShortSG261006	2.400	-1.100
Jardine C&C	26.450	-0.880
ALPHAB 3xLongSG261204US$	5.180	-0.770
XT Vietnam US$	23.920	-0.770
ALPHAB 3xLongSG261006	4.930	-0.730
XT MSINDO US$	13.070	-0.590

Singapore Top Turnover
(as at yesterday)

Name	Last Done	Value
Seatrium Ltd	2.550	268,526,695
DBS	45.060	175,839,962
UOB	37.650	83,423,570
OCBC Bank	17.350	66,495,973
YZJ Shipbldg SGD	3.060	64,131,999
Singtel	3.410	63,025,940
SGX	13.470	47,434,724
IFAST	7.870	40,438,273
CapitaLandInvest	2.510	35,406,842
CapLand IntCom T	1.950	30,022,434

Top % Gainers
(over 5 Trading days as at yesterday)

Name	Last Done	5 Days % Chg
Bilibili 5xLongSG250306	0.028	600.00
Alibaba 5xLongUB250430	0.005	400.00
Memiontec Hldgs	0.044	214.29
BYD 5xLongUB250430	0.006	200.00
Kuaisho 5xLongSG250904	0.012	200.00
SGX MB eCW250627	0.098	172.22
Sunny 5xLongUB250626	2.500	168.82
Lenovo 5xLongUB250430	0.016	166.67
BYD 5xLongSG251216	2.500	165.96
BYD 5xLongUB250321	0.420	156.10

Top % Losers
(over 5 Trading days as at yesterday)

Name	Last Done	5 Days % Chg
NIO MBeCW250226	0.001	-97.22
HSI 19200MBePW250227	0.002	-91.30
HSI 20000MBePW250227	0.011	-80.70
NKY 44000MBeCW250314	0.012	-79.66
BYD 5xShortSG261217	0.163	-76.71
HSI 7xShortSG251029	0.007	-70.83
Alibaba 5xShortSG250320	0.006	-68.42
BYD 5xShortUB250626	0.024	-68.42
Alibaba 5xShortUB260529	0.127	-66.58
Alibaba 5xShortSG260513	0.265	-65.58

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Regional Markets

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
HEIM	25.980	1.940	25.800	21.180
NESTLE	90.640	1.260	130.000	88.000
F&N	26.700	0.820	33.800	25.040
HLIND	13.980	0.760	15.740	8.885
UTDPLT	31.680	0.680	33.480	19.276

Top Losers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
MPI	21.240	-1.160	41.020	21.380
HSI-PWBY	0.320	-0.990	1.550	0.395
HSI-PWBS	0.220	-0.355	1.230	0.350
HSI-PWBX	0.135	-0.310	1.180	0.140
ABLEGLOB	1.530	-0.290	2.230	1.460

HONG KONG (HKD)

Top Gainers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
BYD COMPANY-R (81211)	322.400	57.400	332.000	165.600
BYD COMPANY (1211)	339.200	56.000	354.200	178.200
LAOPU GOLD (6181)	443.600	47.600	470.000	60.950
SPDR GOLD TRT (2840)	2,095.000	40.000	2,115.000	1,440.000
VOICECOMM (2495)	255.000	39.400	264.000	121.000

Top Losers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
BLOKS (325)	84.850	-10.900	109.900	81.900
CAM 20 UST (3146)	732.650	-9.350	842.900	715.700
X TRNIFTY50 (3015)	2,004.000	-9.000	2,370.000	1,940.000
BEIGENE (6160)	130.300	-6.800	153.000	75.450
XPENG-W (9868)	60.550	-6.750	69.350	25.500

NYSE (USD)

Top Gainers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
TransDigm Group	1,353.460	54.110	1,451.320	1,100.860
Biglari Holdings A	1,179.000	47.000	1,330.660	750.000
Rockwell Automation	301.950	33.230	308.695	242.810
ESCO Technologies	165.530	33.110	166.490	96.690
Cloudflare A	172.830	31.310	176.725	66.240

Top Losers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
Berkshire Hathaway A	707,500.000	-7,369.000	741,971.390	590,340.000
NVR	7,300.370	-439.380	9,964.770	7,227.090
Markel Group	1,899.420	-160.410	2,063.680	1,417.650
White Mountains Insurance Group	1,832.070	-144.150	2,023.000	1,650.000
Fair Isaac	1,767.410	-119.890	2,402.515	1,105.650

NASDAQ (USD)

Top Gainers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
Booking Holdings	5,018.110	238.400	5,337.240	3,180.000
Coca-Cola Consolidated	1,425.270	65.140	1,438.500	800.760
Sezzle	305.320	60.130	477.525	38.220
monday.com	317.730	52.400	342.640	174.750
Monolithic Power Systems	699.460	38.560	959.640	546.705

Top Losers

Name	Last Done	5 Days Change	52 Weeks High	52 Weeks Low
First Citizens BancShares A	2,125.310	-85.160	2,412.930	1,460.763
Regeneron Pharmaceuticals	663.860	-58.210	1,211.200	642.000
Tesla	336.510	-37.810	488.540	138.803
Powell Industries	209.430	-35.410	364.980	122.000
Neurocrine Biosciences	117.180	-33.330	157.980	110.950

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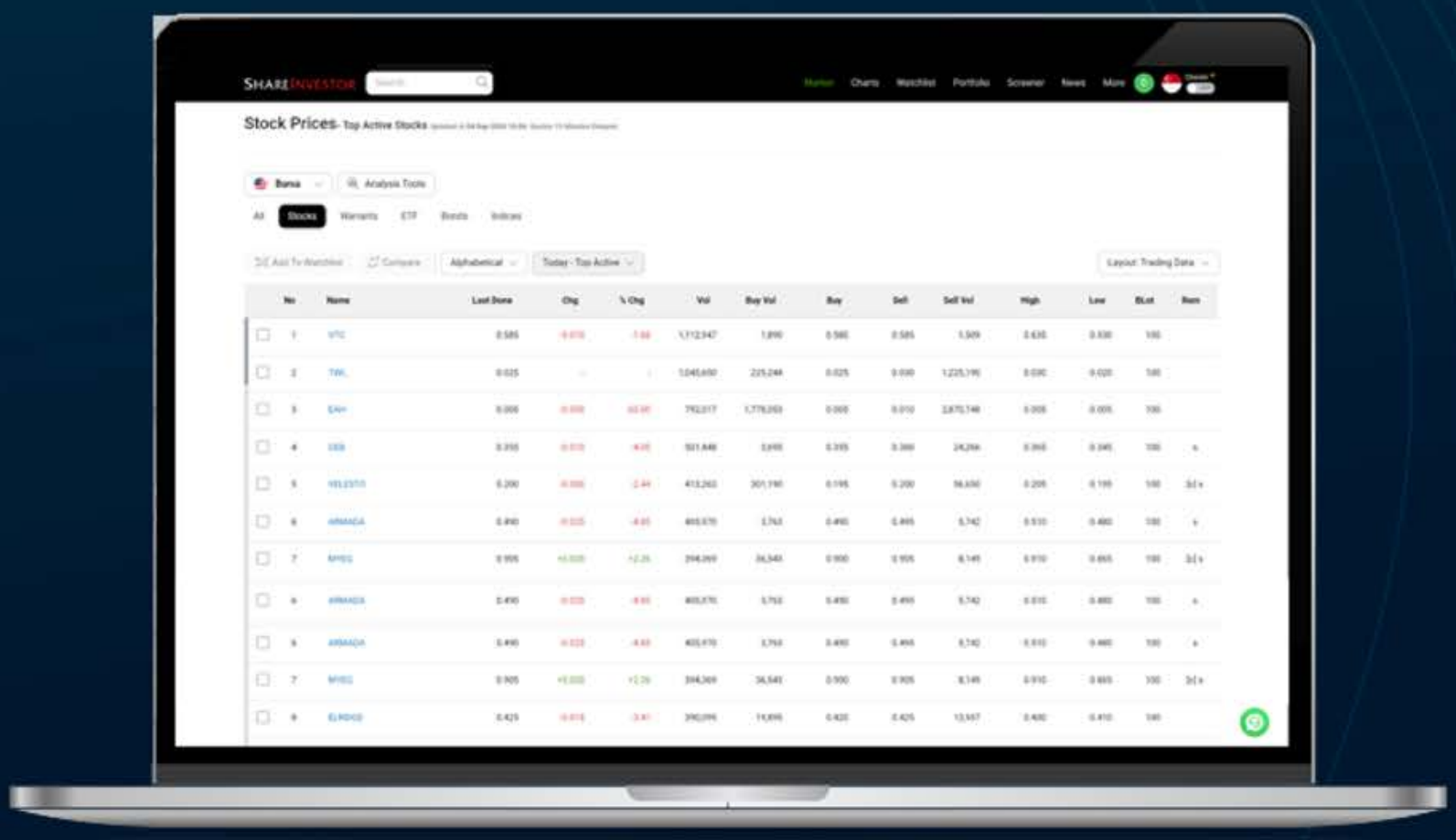

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Fundamental Analysis

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 step-by-step GUIDE

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 Int Hldgs Ltd. (N08.SI)

ANALYSIS

Period		Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-	-
	10 Days	-	-	-
	20 Days	-	-0.005	-1.96 %
Medium Term Return	3 Months	-	-	-
	6 Months	0.009	-	+3.60 %
	1 Year	0.015	+0.035	+25.12 %
Long Term Return	2 Years	0.037	+0.040	+36.67 %
	3 Years	0.055	+0.056	+56.41 %
	5 Years	0.085	+0.090	+121.86 %
Annualised Return	Annualised	-	-	+17.28 %

Stamford Tyres Corporation Ltd (S29.SI)

ANALYSIS

Period		Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-0.020	-8.89 %
	10 Days	-	-	-
	20 Days	-	+0.005	+2.50 %
Medium Term Return	3 Months	-	-0.010	-4.66 %
	6 Months	0.020	-0.001	+9.22 %
	1 Year	0.020	+0.029	+27.04 %
Long Term Return	2 Years	0.035	+0.024	+32.00 %
	3 Years	0.050	+0.025	+41.87 %
	5 Years	0.068	+0.004	+35.82 %
Annualised Return	Annualised	-	-	+6.31 %

Tai Sin Electric Limited (500.SI)

ANALYSIS

Period		Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	+0.010	+2.53 %
	10 Days	-	+0.010	+2.53 %
	20 Days	-	+0.010	+2.53 %
Medium Term Return	3 Months	-	+0.015	+3.85 %
	6 Months	0.016	+0.010	+6.58 %
	1 Year	0.024	+0.010	+8.61 %
Long Term Return	2 Years	0.047	-0.005	+10.24 %
	3 Years	0.071	+0.029	+23.64 %
	5 Years	0.108	+0.075	+56.48 %
Annualised Return	Annualised	-	-	+9.22 %

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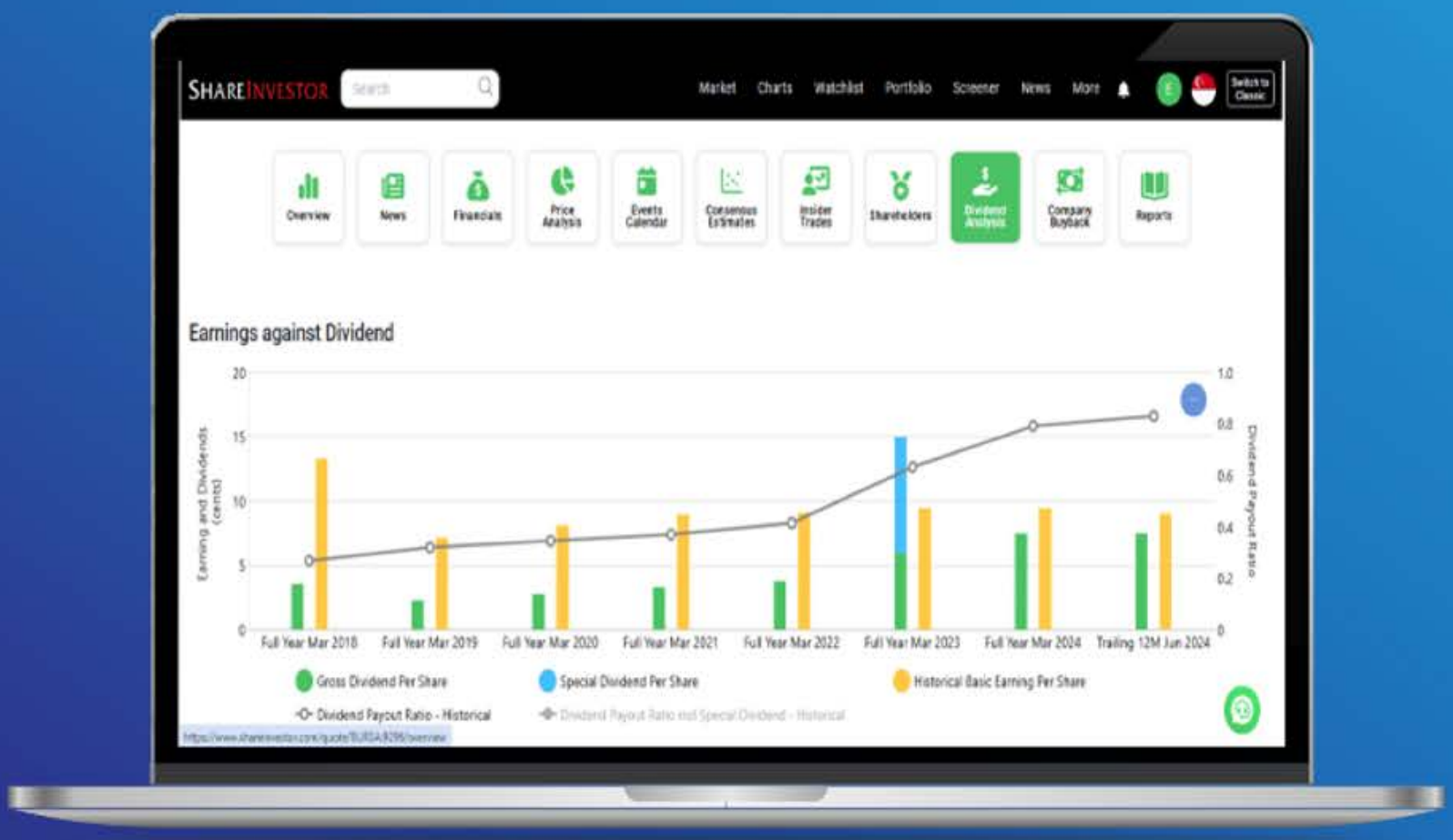

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Fundamental Analysis

Growth Stocks

Price & Total Shareholder Return *(as at yesterday)*

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 step-by-step GUIDE

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

Sim Leisure Group Ltd. (URR.SI)

ANALYSIS

Period		Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-	-
	10 Days	-	+0.040	+5.80 %
	20 Days	-	+0.025	+3.66 %
Medium Term Return	3 Months	-	-0.140	-16.09 %
	6 Months	-	-0.270	-27.00 %
Long Term Return	1 Year	0.000	+0.150	+27.41 %
	2 Years	0.023	+0.490	+178.89 %
	3 Years	0.023	+0.560	+342.94 %
	5 Years	0.032	+0.515	+264.88 %
Annualised Return	Annualised	-	-	+28.83 %

CNMC Goldmine Holdings Limited (5TP.SI)

ANALYSIS

Period		Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	+0.010	+3.23 %
	10 Days	-	+0.045	+16.36 %
	20 Days	-	+0.050	+23.08 %
Medium Term Return	3 Months	-	+0.080	+33.33 %
	6 Months	0.004	+0.085	+37.87 %
Long Term Return	1 Year	0.011	+0.124	+68.88 %
	2 Years	0.015	+0.147	+93.64 %
	3 Years	0.023	+0.120	+71.60 %
	5 Years	0.029	+0.076	+43.03 %
Annualised Return	Annualised	-	-	+7.42 %

Ifast Corporation Ltd. (AIY.SI)

ANALYSIS

Period		Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	+0.310	+4.10 %
	10 Days	-	+0.520	+7.22 %
	20 Days	-	+0.660	+9.15 %
Medium Term Return	3 Months	-	+0.670	+9.31 %
	6 Months	0.015	+0.700	+9.97 %
	1 Year	0.057	+0.050	+1.37 %
Long Term Return	2 Years	0.105	+2.630	+52.19 %
	3 Years	0.153	+1.470	+26.36 %
	5 Years	0.229	+6.850	+694.02 %
Annualised Return	Annualised	-	-	+51.34 %

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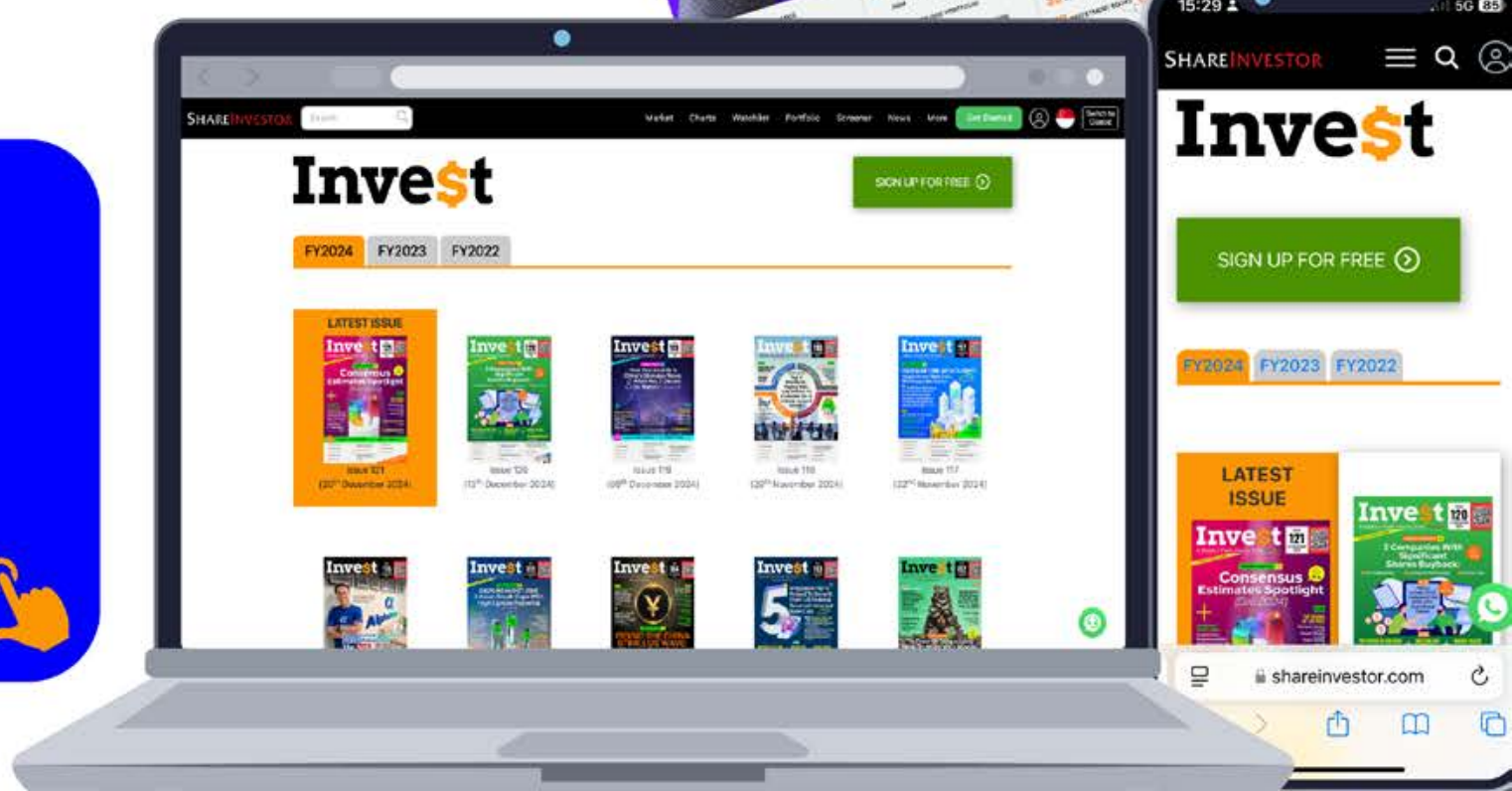

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Fundamental Analysis

Value Stocks

Price & Total Shareholder Return *(as at yesterday)*

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 step-by-step GUIDE

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

Noel Gifts International Ltd (543.SI)

ANALYSIS

Period		Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-0.005	-2.33 %
	10 Days	-	-0.005	-2.33 %
	20 Days	-	-0.005	-2.33 %
Medium Term Return	3 Months	-	-0.040	-16.00 %
	6 Months	0.120	-0.020	+43.48 %
	1 Year	0.120	+0.014	+68.37 %
Long Term Return	2 Years	0.132	+0.056	+122.08 %
	3 Years	0.147	+0.065	+146.21 %
	5 Years	0.162	+0.093	+243.59 %
Annualised Return	Annualised	-	-	+28.00 %

Wee Hur Holdings Ltd. (E3B.SI)

ANALYSIS

Period		Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	+0.030	+6.06 %
	10 Days	-	+0.050	+10.53 %
	20 Days	-	+0.075	+16.67 %
Medium Term Return	3 Months	-	+0.090	+22.09 %
	6 Months	0.002	+0.305	+139.66 %
	1 Year	0.006	+0.300	+172.31 %
Long Term Return	2 Years	0.011	+0.320	+161.46 %
	3 Years	0.016	+0.329	+176.02 %
	5 Years	0.026	+0.315	+163.33 %
Annualised Return	Annualised	-	-	+21.37 %

Casa Holdings Limited (C04.SI)

ANALYSIS

Period		Dividend Received	Capital Appreciation	Total Shareholder Return
Short Term Return	5 Days	-	-0.001	-0.94 %
	10 Days	0.010	-0.000	+3.60 %
	20 Days	0.010	-0.003	+5.48 %
Medium Term Return	3 Months	0.010	-0.003	+5.48 %
	6 Months	0.010	+0.016	+29.21 %
	1 Year	0.010	+0.034	+61.97 %
Long Term Return	2 Years	0.013	+0.019	+37.21 %
	3 Years	0.016	+0.021	+44.06 %
	5 Years	0.026	+0.049	+133.93 %
Annualised Return	Annualised	-	-	+18.53 %

Disclaimer: The information on this page is provided as a service to readers. It does not constitute financial advice and/or any investment recommendations. Past performance is not indicative of future results. We assume no liability for damages resulting from or arising out of the use of such information. It would be best if you did your own research to make your personal investment decisions wisely or consult a licenced investment advisor.

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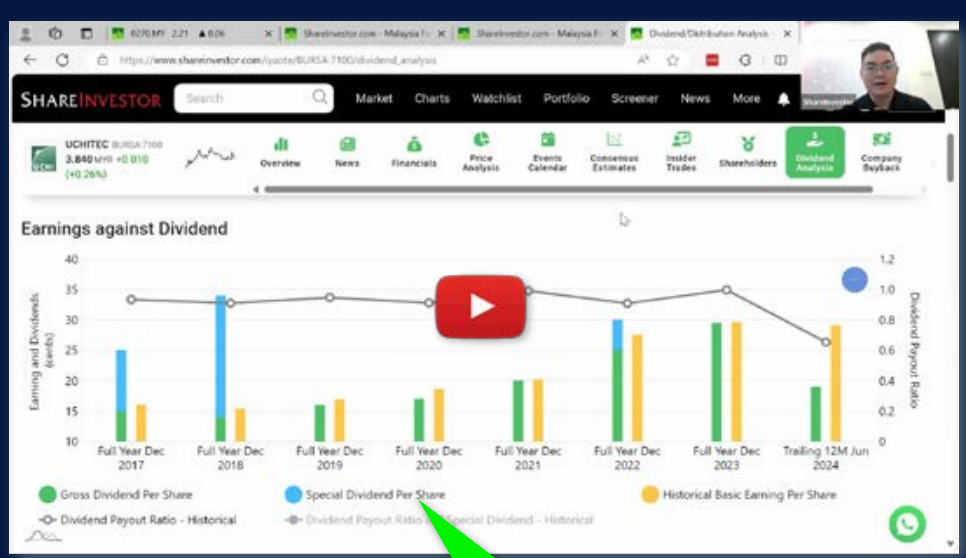

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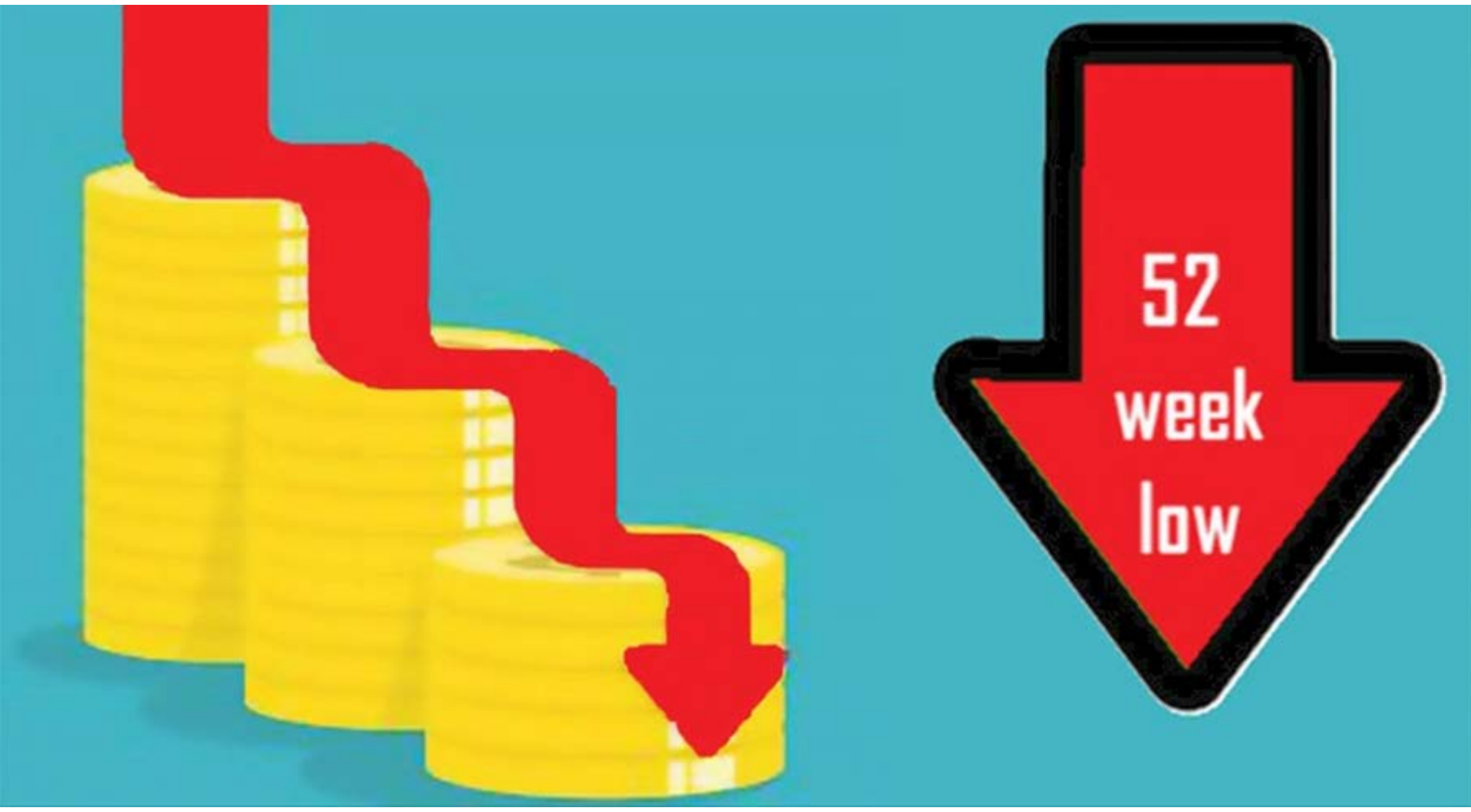
COMPANY SPOTLIGHT

Market Underdogs with 52-Week Low That Deserve a Second Look

Investor-One / Thu, Jan 30, 8:00 PM



In the world of investing, opportunities often lie where the majority fail to look. While many investors flock to stocks at all-time highs, chasing momentum and headlines, a contrarian approach can sometimes yield the best results.

One compelling area to explore is stocks trading at their 52-week lows. These so-called market underdogs may appear unloved or overlooked, but they often hold significant potential for a rebound.

By combining the power of stock screeners with fundamental analysis, we've identified three such hidden gems which not only trade at their yearly lows but also meet strict valuation criteria, offering intriguing opportunities for patient investors.

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continued... *[Market Underdogs with 52-Week Low That Deserve a Second Look]*

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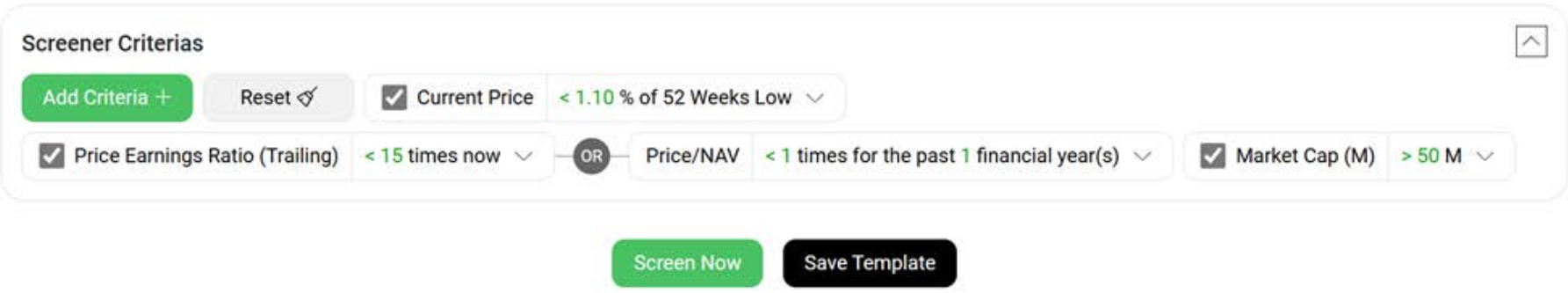
Screening for 52 week low stocks

A stock screener is an invaluable tool for filtering opportunities in the market.



Source: *Shareinvestor Pro*

Using an investor tool like Shareinvestor Pro and setting parameters such as a 52-week low, a market capitalization threshold, and valuation metrics like a price-to-earnings (P/E) ratio below 15x or price-to-book (P/B) ratio below 1x, investors can zero in on companies with potential for value-driven returns.

A low P/E suggests that a stock is undervalued compared to its earnings, while a P/B below 1x indicates it may be trading below its net asset value. This method ensures that we identify not just any stock at a low price, but those with sound fundamentals and tangible growth prospects.

With these filters in place, AEM Holdings, Delfi, and SBS Transit emerged as standout candidates, warranting a closer look.

AEM Holdings

AEM Holdings is a prominent player in semiconductor testing solutions, serving some of the biggest names in the technology sector.

continued on next page...

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continued... *[Market Underdogs with 52-Week Low That Deserve a Second Look]*

The company has established itself as a critical supplier to global semiconductor giants, leveraging its innovative testing technologies to stay ahead in a highly competitive industry.

Despite its robust client base, the stock has hit a 52-week low due to cyclical headwinds in the semiconductor industry. While it does not have any P/E ratio at the moment due to losses, it is interesting to see that it currently trades at a Price/Nav of 0.83x – unheard of given it's a technology stock.

The downturn in chip demand has weighed heavily on investor sentiment, driving the stock lower over the past year. However, these challenges appear to be temporary, as semiconductor demand is expected to rebound with advancements in AI, 5G, and IoT applications.

AEM's forward-thinking investments in next-generation testing technologies position it well for the eventual upturn in the semiconductor cycle. For those willing to weather the cyclical storm, AEM's long-term growth prospects could offer substantial rewards.

Delfi

Delfi, a household name in the chocolate and confectionery market, has also found itself on the 52-week lows list.

The company's stock has struggled due to rising input costs and supply chain disruptions, which have hurt profitability and dampened investor confidence.

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continued... *[Market Underdogs with 52-Week Low That Deserve a Second Look]*

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However, Delfi continues to innovate and expand its product portfolio to capture market share in key Southeast Asian regions. Its strong brand equity ensures customer loyalty, and its diversified revenue streams provide some insulation against economic fluctuations.

Trading at a P/E ratio of only 8.6x at the time of writing, Delfi offers a rare opportunity to own a well-established consumer staple at a discount.

As raw material costs stabilize and supply chain challenges ease, the company could see a rebound in profitability. Delfi's focus on operational efficiency and market expansion supports the case for long-term growth, making it an intriguing prospect for value investors.

SBS Transit

SBS Transit, a key player in Singapore's public transportation sector, rounds out this list.

The company has been a staple in ensuring seamless mobility for millions, but its stock has hit a 52-week low amid concerns over post-pandemic ridership recovery and rising operational costs.

Despite these challenges, SBS Transit has continued to modernize

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continued... *[Market Underdogs with 52-Week Low That Deserve a Second Look]*

its fleet and improve operational efficiency, ensuring it remains a leader in the transportation industry.

The company also benefits from government support and public-private partnerships, providing a stable foundation for its operations.

A modest 11.1x P/E ratio and a decent 4.5% trailing dividend yield, makes the stock appealing. The company's consistent dividend payouts further enhance its appeal, especially for conservative investors seeking stability.

With the normalization of the economy and a steady increase in ridership, SBS Transit could regain its footing, offering both stability and potential upside for investors.

Conclusion

Stocks trading at 52-week lows can often be dismissed as underperformers, but a deeper analysis reveals that some hold significant potential.

By using stock screeners and applying strict valuation filters like P/E and P/B ratios, investors can identify companies that are not just cheap but undervalued.

These market underdogs may require patience and a long-term view, but for those willing to go against the crowd, the rewards can be substantial. In the world of investing, sometimes the best opportunities lie not in the spotlight but in the overlooked corners of the market.

Disclaimer: *This article is for informational purposes only and not intended as investment advice.*

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 Catalist.

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

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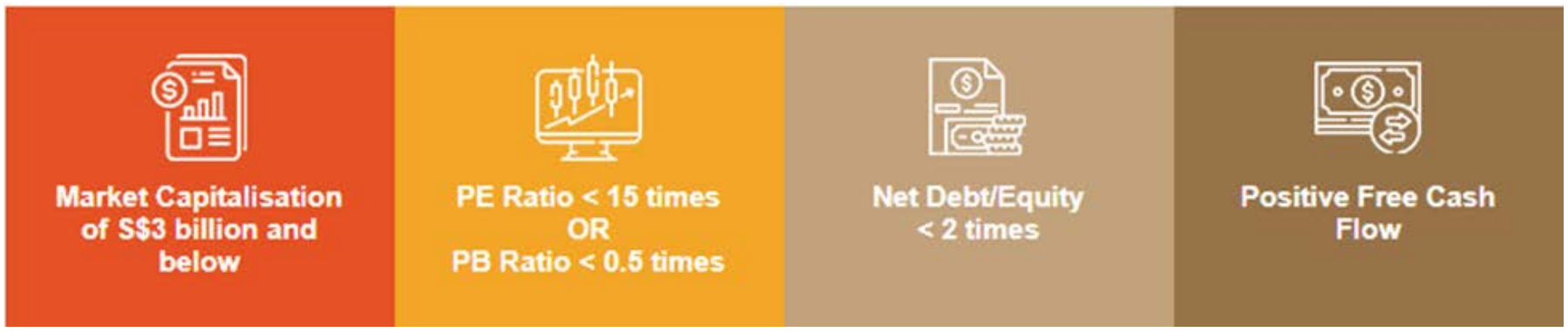
Discover Growing Companies

Monthly Portfolio Update: Jan 2025

Investor-One / Tue, Feb 11, 8:00 PM

Good day investors!

We are pleased to report on the performance for our Investor-One model portfolio.



For a quick background, our model portfolio is created with a long-term focus on value stocks based on our metrics as shown above - strong balance sheet, positive free cash flow, cheap valuations and a focus on growing small and mid-cap companies within Singapore Exchange Catalist and Main Board.

Check out the portfolio over here: **https://www.investor-one.com/portfolio#/**

Since the portfolio's inception of 15 Feb 2022, it has achieved a total return of 35.4% at the time of writing. This is particularly noteworthy when compared to the FTSE ST Small Cap Index, which has experienced a decline of -24.3% (excluding dividends) during the same period.

The portfolio has also delivered returns to investors through $12,641 in distributed dividends. We are currently holding $19,450

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in uninvested cash, which allows us to strategically position the portfolio for future opportunities.

Now, let's delve into some of the new developments for 3 selected stocks from our portfolio: Hock Lian Seng, Nordic and United Hampshire REIT USD.

Hock Lian Seng

Hock Lian Seng Holdings Limited is a Singapore-based integrated group with a diversified portfolio spanning civil engineering, property development, and property investment. The Group leverages decades of expertise to deliver high-quality infrastructure and real estate solutions across the region.

With a commitment to operational excellence and prudent financial management, Hock Lian Seng has built a reputation as a trusted partner in both construction and property markets.

Recent Developments

For the first half of 2024, Hock Lian Seng reported consolidated revenue of S$99.8 million—a 6% decrease compared to the same period last year.

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This decline was largely driven by the substantial completion of its CAG joint venture project in the Civil Engineering segment. Despite lower revenue, the Group achieved a significant turnaround in profitability. Gross profit surged by 214%, rising from S$6.8 million in 1H2023 to S$21.3 million in 1H2024.

This improvement was underpinned by the timely finalisation of subcontractor accounts in the Civil Engineering segment and strong market performance in property sales, particularly at the Shine@ Tuas South project which contributed an extra S$7.5 million in gross profit.

The operational enhancements were further reflected in the bottom line, with profit before tax more than doubling from S$11.0 million to S$24.0 million, and net profit escalating by nearly 129% to S$20.4 million.

These results underscore the Group's effective cost management, strategic project execution, and its ability to navigate market dynamics favourably.

Valuation + Dividends

The Group's strengthened performance has translated into an improved balance sheet, with net asset value per ordinary share rising from 50.6 cents at year-end 2023 to 53.2 cents as at 30 June 2024.

Demonstrating its commitment to rewarding shareholders, Hock Lian Seng declared a final dividend of 1.5 cents per ordinary share for the preceding financial year, up 50% from 1.0 cent previously.

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This steady dividend policy, coupled with solid operational results, positions Hock Lian Seng well for sustained long-term growth and continues to offer an attractive proposition for investors.

Nordic Group

Nordic Group Limited is a Singapore-headquartered global engineering solutions provider with a diversified portfolio spanning project services and maintenance operations.

The Group serves a wide range of industries, including marine, offshore oil and gas, petrochemical, and infrastructure, delivering integrated engineering solutions that combine technological innovation with operational excellence.

With a strategic presence across Singapore, China, and Malaysia, Nordic Group has built a robust reputation for reliability and value-added service in challenging market environments.

Recent Developments

In its 1H2024 financial report, Nordic Group reported revenue of S$76.2 million, a 15% decline compared to the previous year - primarily due to the completion of several large-scale project services contracts.

However, the Group's maintenance services segment recorded a 19% year-on-year growth, which helped to partially offset the overall revenue dip. On a bright note, when compared sequentially to the six months ended 31 December 2023, revenue and gross profit improved by 7% and 23% respectively, highlighting the positive impact of successful order book replenishment initiatives.

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The Group's net profit after tax for 1H2024 stood at S$8.5 million, a 16% decrease on a year-on-year basis. That said, this figure marked a robust 45% sequential improvement from 2H2023 as well.

A key factor behind this performance was the replenishment of its outstanding order book, which reached S$240.1 million as of 30 June 2024. This replenishment was driven by a 76% increase in project services orders and a 5% rise in maintenance services orders, thereby providing a strong foundation for future revenue stability.

Further reinforcing this positive momentum, the 3Q2024 business update indicated that, for the nine months ended 30 September 2024, the Group achieved revenue of S$120.9 million and a net profit of S$12.7 million.

The update underscored continued improvements in operational efficiency and profitability, despite a challenging macroeconomic backdrop characterized by higher interest rates, geopolitical tensions, and inflationary pressures.

Valuation + Dividends

In recognition of its commitment to enhancing shareholder value, Nordic Group declared an interim dividend of 0.8526 Singapore cents per ordinary share for 1H2024, translating to a dividend payout ratio of 40% and a 4.1% dividend yield trailing 12 months.

The strong order book coupled with sequential profitability improvements signals a promising outlook for the Group.

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As Nordic Group continues to expand its recurring revenue through strategic acquisition of maintenance contracts and diversified service offerings, the current valuation and stable 40% dividend policy further reinforce its attractive long-term growth prospects for investors.

United Hampshire REIT USD

United Hampshire US REIT is a Singapore-listed real estate investment trust with a focused strategy of investing in a diversified portfolio of stabilised, income-producing properties in the United States.

The REIT's assets primarily comprise grocery-anchored and necessity-based retail properties as well as modern, climate-controlled self-storage facilities—predominantly located along the U.S. East Coast.

With a carrying value of approximately US$738.7 million and a total net lettable area of around 3.6 million square feet, United Hampshire US REIT is dedicated to maintaining high tenant quality and operational resilience through proactive portfolio management and long-term leasing strategies.

Recent Developments

For the third quarter of 2024, United Hampshire US REIT demonstrated resilient operational performance.

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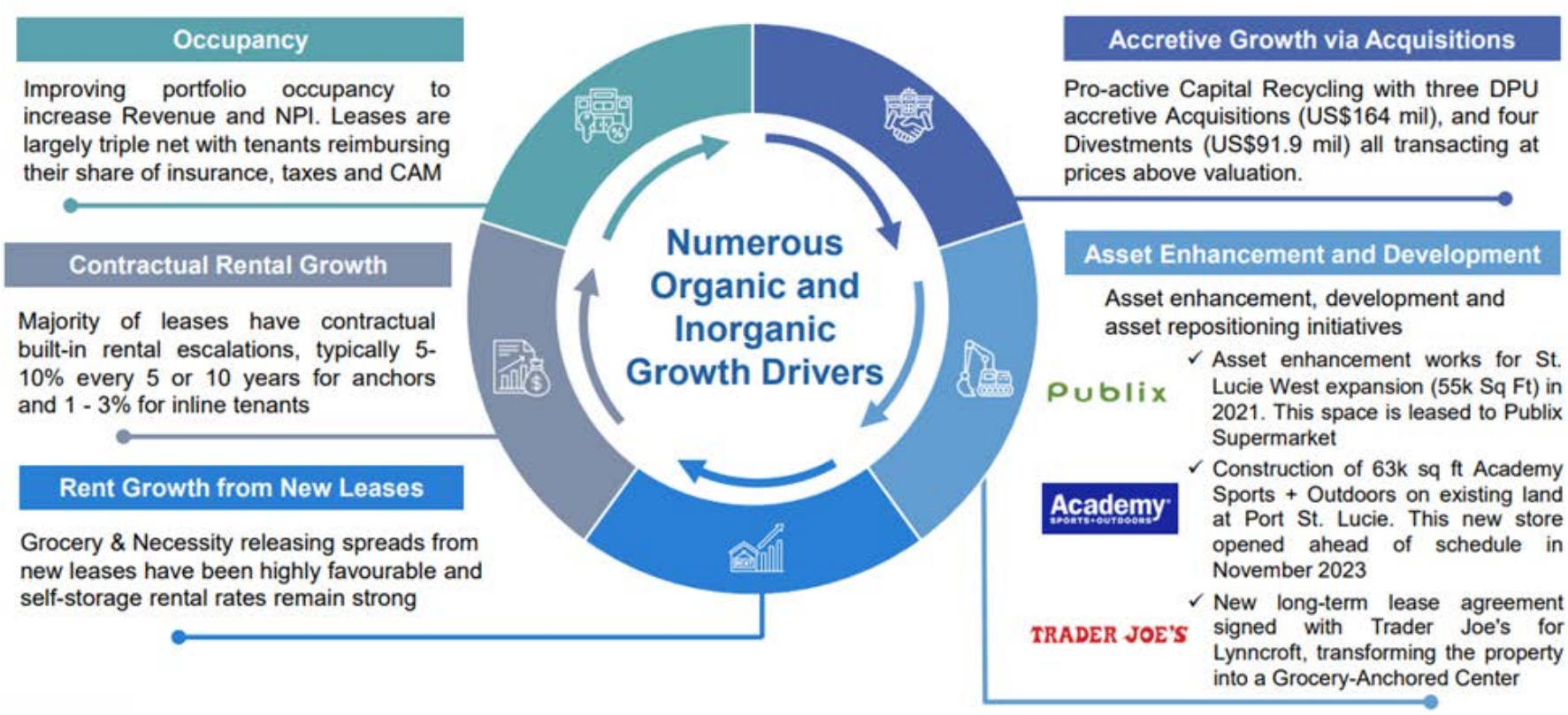

Key highlights include:

- Occupancy and Lease Profile: The Grocery & Necessity portfolio recorded a high committed occupancy rate of 97.6% as of 30 September 2024, with a significant increase in weighted average lease expiry (WALE) from 7.7 to 7.9 years - reflecting strong leasing momentum and a 92% tenant retention rate since its IPO.

Self-Storage properties also maintained robust occupancy levels, with rates of 94.8% and 92.5% reported at Carteret and Millburn, respectively.

- Revenue and Income Performance: Over the nine months ended 30 September 2024, gross revenue edged up by 0.6% year-on-year to US$54.7 million, supported by new lease agreements, rental escalations from existing contracts, and additional income generated from the newly opened Academy Sports store at St. Lucie West.

Although net property income (NPI) declined by 3.4% year-on-year to US$37.4 million due to the divestment of select properties and ongoing tenant transitions, the underlying operational fundamentals remain robust.

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- Capital Management and Strategic Leases: Following the successful refinancing of the Arundel Plaza loan earlier in 2024, the REIT has no refinancing requirements until November 2026, and its interest rate swap contracts extend until December 2026.

A strategic milestone was the execution of a 20-year lease with Food Bazaar Supermarket in Piscataway, New Jersey, which not only underscores the REIT's strong market positioning but also further enhances its WALE and income visibility.

Valuation + Dividends

United Hampshire US REIT's disciplined asset management and strong leasing fundamentals have reinforced its valuation and underpinned its commitment to delivering sustainable income for unitholders.

The REIT's aggregate leverage ratio of 39.9%, coupled with proactive capital management, positions it well to weather market volatility.

As the REIT continues to benefit from favourable U.S. economic conditions and strong consumer spending, its strategic initiatives are expected to bolster future distributions, further enhancing shareholder value.

Conclusion

Investor-One Portfolio's impressive returns underscores the strength of its strategic asset allocation and staying the course for huge returns.

While past returns do not guarantee future success, the portfolio's

continued on next page...

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latest achievements serves as a promising indicator for both current and prospective investors.

Stay tuned for further updates as we continue to monitor and report on the key developments that could shape the future trajectory of I-One Portfolio.

Disclaimer: *This article is for informational purposes only and not intended as investment advice.*

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Investor-One Portfolio

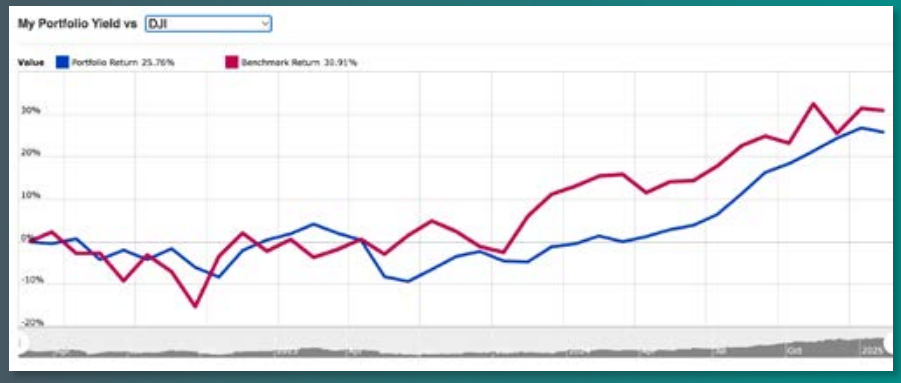
(As at yesterday)

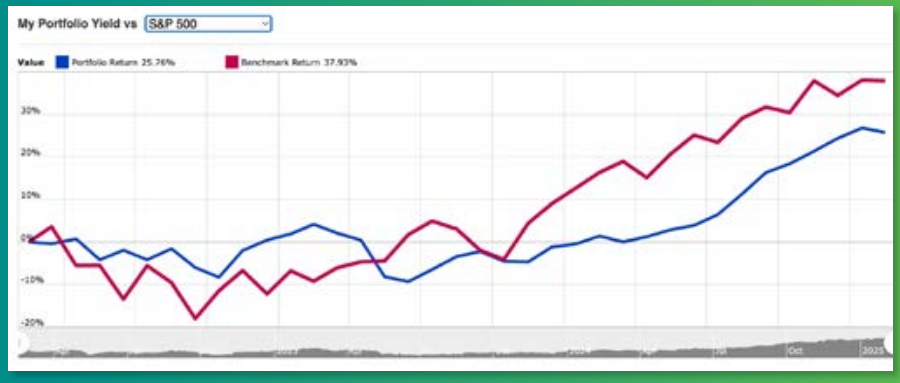
Curated by Investor-One team, this portfolio features growing small and mid cap companies within Singapore Exchange Catalist and Main Board.

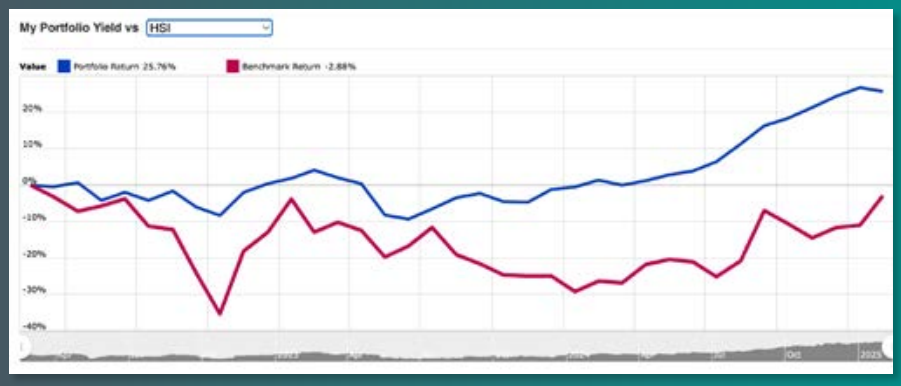
The criteria for the companies are selected based on the following metrics, with further evaluation on qualitative factors like management team and growth prospects:

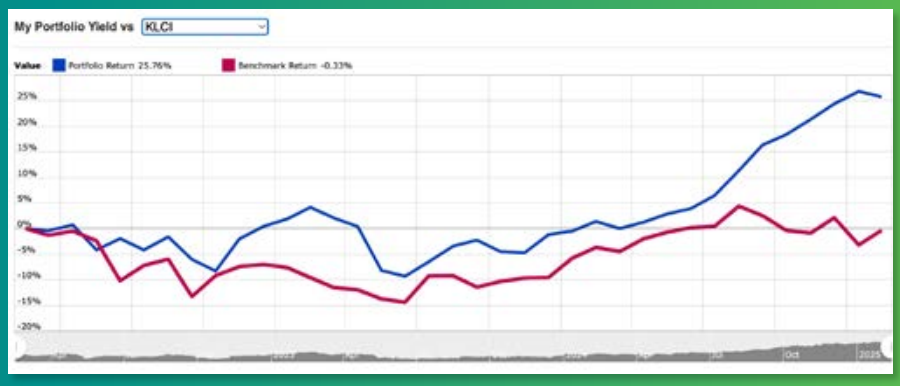
35.2% Total Return

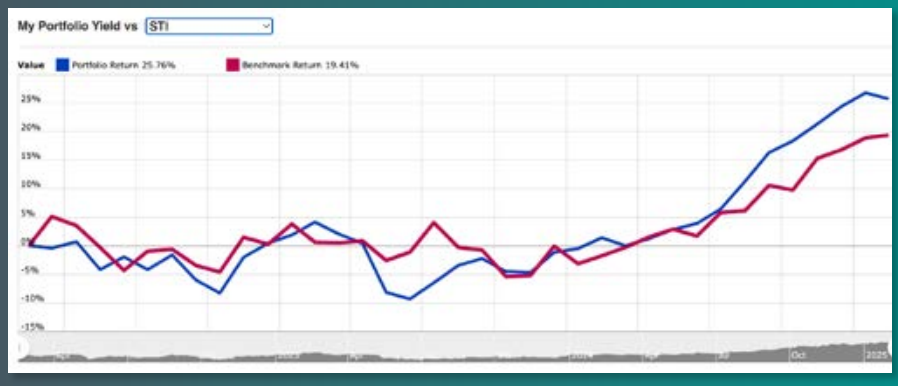
ROI(%)	YTD(%)	Value	P/L	Dividend	P/L + Dividend	Cash	Currency
35.15	1.51	115,712	22,521	12,627	35,148	19,436	SGD

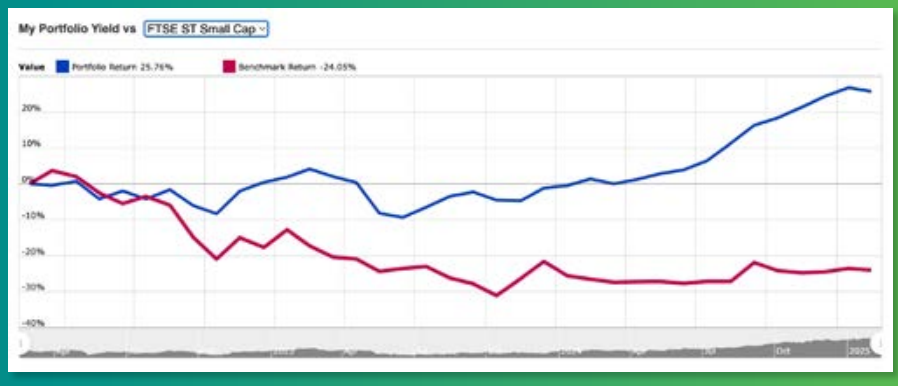












Note: *The Portfolio Return indicated in the chart does not include dividend income, as opposed to Total Return that is inclusive of Dividend Income.*

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Discover Growing Companies

Summary

Open Positions

Unrealized P/L ↑ 26,224

Name	Weightage	Entry	Last	Chg	Share	P/L	Div	P/L + Div	Cost	Value
Centurion	43.76%	0.4	1.01	-0.01 (-0.98%)	50000	30,500 (152.50%)	1,500	32,000	20,000	50,500
Geo Energy Res	7.56%	0.31	0.27	-0.005 (-1.82%)	32300	-1,292 (-12.90%)	2,132	840	10,013	8,721
Hock Lian Seng	7.10%	0.29	0.41	-0.005 (-1.20%)	20000	2,400 (41.38%)	750	3,150	5,800	8,200
Hyphens Pharma	12.13%	0.3	0.28	-	50000	-1,000 (-6.67%)	3,120	2,120	15,000	14,000
JEP Hldgs	7.00%	0.31	0.25	-	32300	-1,938 (-19.35%)	-	-1,938	10,013	8,075
Kimly	2.73%	0.4	0.315	-0.005 (-1.56%)	10000	-850 (-21.25%)	536	-314	4,000	3,150
Nordic	2.86%	0.395	0.33	-	10000	-650 (-16.46%)	527	-123	3,950	3,300
+ UtdHampshReitUSD	16.87%	0.681	0.48	-	30000	-946 (-4.63%)	1,688	742	20,415	19,469

Summary

Closed Positions

Realized Profit ↓ -4,000

Name	Avg Buy	Avg Sell	Shares	Comm	P/L	P/L + Div	Proceeds
HG Metal	0.375	0.34	10000	-	-350	50	3,400
HRnetGroup	0.77	0.715	20000	-	-1,100	674	14,300
InnoTek	0.735	0.48	10000	-	-2,550	-2,350	4,800

Transaction

Action	Stock	Price	Shares	Exchange Rate	Comm	Amount	Date	Notes
Sell	HRnetGroup	0.715	20000	N/A	0.00	14,300	2 Jan 2024	-
Buy	Centurion	0.400	50000	N/A	0.00	20,000	2 Jan 2024	-
Buy	UtdHampshReitUSD	0.500	30000	1.36	0.00	15,000	2 Jan 2024	-
Buy	JEP Hldgs	0.310	32300	N/A	0.00	10,013	4 Jul 2023	-
Buy	Geo Energy Res	0.310	32300	N/A	0.00	10,013	13 Mar 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	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	-

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Dividend

YTD	TRAILING 12 MONTHS	2024	2023
SGD 100.00	SGD 4649.92	SGD 4661.92	SGD 5405.90

Stock	Ex-Date	Payable Date	Amt	Amt(SGD)	Total
Kimly	03 Feb 2025	14 Feb 2025	SGD 0.0100	0.0100	100
Geo Energy Res	15 Dec 2024	08 Jan 2025	SGD 0.0020	0.0020	64.60
Centurion	05 Sep 2024	30 Sep 2024	SGD 0.0150	0.0150	750
Geo Energy Res	20 Aug 2024	29 Aug 2024	SGD 0.0020	0.0020	64.60
UtdHampshReitUSD	20 Aug 2024	27 Sep 2024	SGD 0.0133	0.0180	541.04
UtdHampshReitUSD	20 Aug 2024	27 Sep 2024	SGD 0.0068	0.0092	276.62
Nordic	19 Aug 2024	04 Sep 2024	SGD 0.0085	0.0085	85.30
Kimly	26 Jun 2024	15 Jul 2024	SGD 0.0100	0.0100	100
Geo Energy Res	22 May 2024	31 May 2024	SGD 0.0020	0.0020	64.60
Centurion	08 May 2024	31 May 2024	SGD 0.0150	0.0150	750
Geo Energy Res	08 May 2024	17 May 2024	SGD 0.0060	0.0060	193.80
Nordic	07 May 2024	17 May 2024	SGD 0.0059	0.0059	58.80
Hyphens Pharma	07 May 2024	24 May 2024	SGD 0.0086	0.0086	430
Hock Lian Seng	05 May 2024	17 May 2024	SGD 0.0150	0.0150	300
UtdHampshReitUSD	28 Feb 2024	28 Mar 2024	SGD 0.0132	0.0179	536.98
UtdHampshReitUSD	28 Feb 2024	28 Mar 2024	SGD 0.0082	0.0111	333.58
Kimly	29 Jan 2024	09 Feb 2024	SGD 0.0112	0.0112	112
Geo Energy Res	20 Nov 2023	29 Nov 2023	SGD 0.0040	0.0040	129.20
HRnetGroup	30 Aug 2023	11 Sep 2023	SGD 0.0187	0.0187	374
Geo Energy Res	28 Aug 2023	06 Sep 2023	SGD 0.0050	0.0050	161.50
Nordic	17 Aug 2023	04 Sep 2023	SGD 0.0100	0.0100	100.10
Hyphens Pharma	16 Aug 2023	31 Aug 2023	SGD 0.0360	0.0360	1800
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
Nordic	07 May 2023	17 May 2023	SGD 0.0091	0.0091	90.60
Hock Lian Seng	07 May 2023	19 May 2023	SGD 0.0100	0.0100	200
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
HRnetGroup	08 May 2022	18 May 2022	SGD 0.0300	0.0300	600
Hock Lian Seng	08 May 2022	20 May 2022	SGD 0.0125	0.0125	250
HG Metal	05 May 2022	20 May 2022	SGD 0.0400	0.0400	400
Nordic	05 May 2022	17 May 2022	SGD 0.0061	0.0061	60.80
Nordic	05 May 2022	17 May 2022	SGD 0.0015	0.0015	15.20

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

Disclaimer:

1. The Investor-One portfolio is aggregated for educational and illustration purposes only. It is curated based on fixed financial parameters as indicated above. The investor-one team select their stocks solely base on the these fixed parameters. The featured companies are for information only and does not constitute investment advice.
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3. Current Price, current value and gain/loss (%) under current portfolio are based on 10 minutes delayed data.
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COMPANY SPOTLIGHT

Temasek Holdings' Hidden Treasures: Stocks You Need to Know About

Investor-One / Sat, Feb 1, 8:00 PM

In the world of investing, few strategies are as compelling as following the trail of significant shareholders.

These key players, often institutional investors or government-linked entities, hold substantial stakes in companies and wield considerable influence over their strategic direction.

In Singapore, Temasek Holdings, a globally recognized investment powerhouse, exemplifies the critical role of significant shareholders in shaping corporate growth.

For retail investors, understanding these relationships offers a

continued on next page...

continued... [Temasek Holdings' Hidden Treasures: Stocks You Need to Know About]

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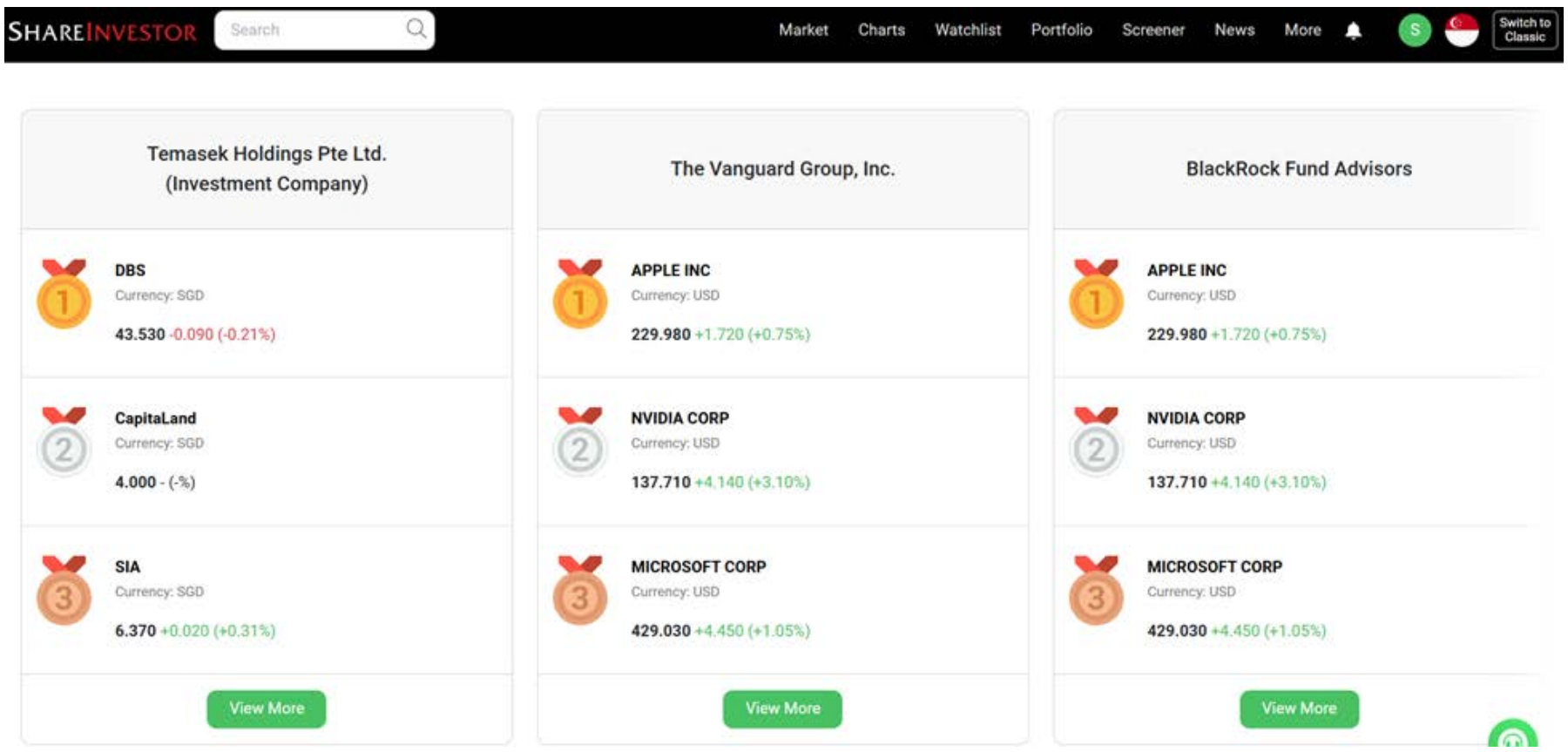
unique window into identifying promising stocks and sectors. But, let's first take a quick look on how the ShareInvestor tool can uncover these opportunities.

Significant Shareholders feature

Significant shareholders are more than just investors; they are catalysts for growth and stability. By examining their stakes and strategies, we can discern patterns that may guide our investment decisions.

With the ShareInvestor tool, a wealth of insights is available, allowing users to analyze shareholding structures, corporate profiles, and market performance.



Source: *Shareinvestor Pro*

For instance, when you login to Shareinvestor Pro and head to the "Significant Shareholders feature", you can spot Temasek's top 3 prized companies which I will cover below.

continued on next page...

continued... *[Temasek Holdings' Hidden Treasures: Stocks You Need to Know About]*

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DBS Group Holdings: Banking on Stability and Innovation

DBS Group Holdings is one of Singapore's most prominent financial institutions and a jewel in Temasek Holdings' portfolio.

As a significant shareholder, Temasek's confidence underscores DBS's reputation as a stable and innovative banking leader. DBS's digital transformation initiatives, including its award-winning mobile banking platforms, have redefined customer experiences and set new industry benchmarks.

Recently, DBS has expanded its green financing initiatives, aligning with global sustainability trends. The bank's robust financial performance, driven by strong net interest income and non-interest revenue growth, positions it as a reliable choice for investors.

Growth prospects remain solid, with DBS exploring opportunities in regional markets like India and Indonesia. Its significant shareholder base, including Temasek, ensures consistent governance and strategic alignment, making it a cornerstone for any portfolio.

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continued... *[Temasek Holdings' Hidden Treasures: Stocks You Need to Know About]*

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CapitaLand Investment: Redefining Real Estate Investment

CapitaLand Investment Limited (CLI) is another company where Temasek Holdings holds a significant stake, reflecting its confidence in Singapore's real estate and asset management sectors.

CLI's unique focus on sustainability and digitalization has propelled it into the ranks of Asia's leading real estate investment managers.

In recent years, CLI has undertaken bold initiatives, including divesting non-core assets and recycling capital into growth markets. Its emphasis on green-certified properties and integration of technology to enhance tenant experiences has earned it accolades.

The company's long-term growth prospects are tied to its ability to capture value from urbanization trends in key Asian markets. Temasek's involvement provides a layer of credibility, ensuring that CLI remains at the forefront of industry evolution.

Singapore Airlines: Soaring High with Strategic Backing

Singapore Airlines (SIA), synonymous with premium air travel, is a prime example of how significant shareholders like Temasek can steer a company through challenging times.

continued on next page...

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continued... *[Temasek Holdings' Hidden Treasures: Stocks You Need to Know About]*

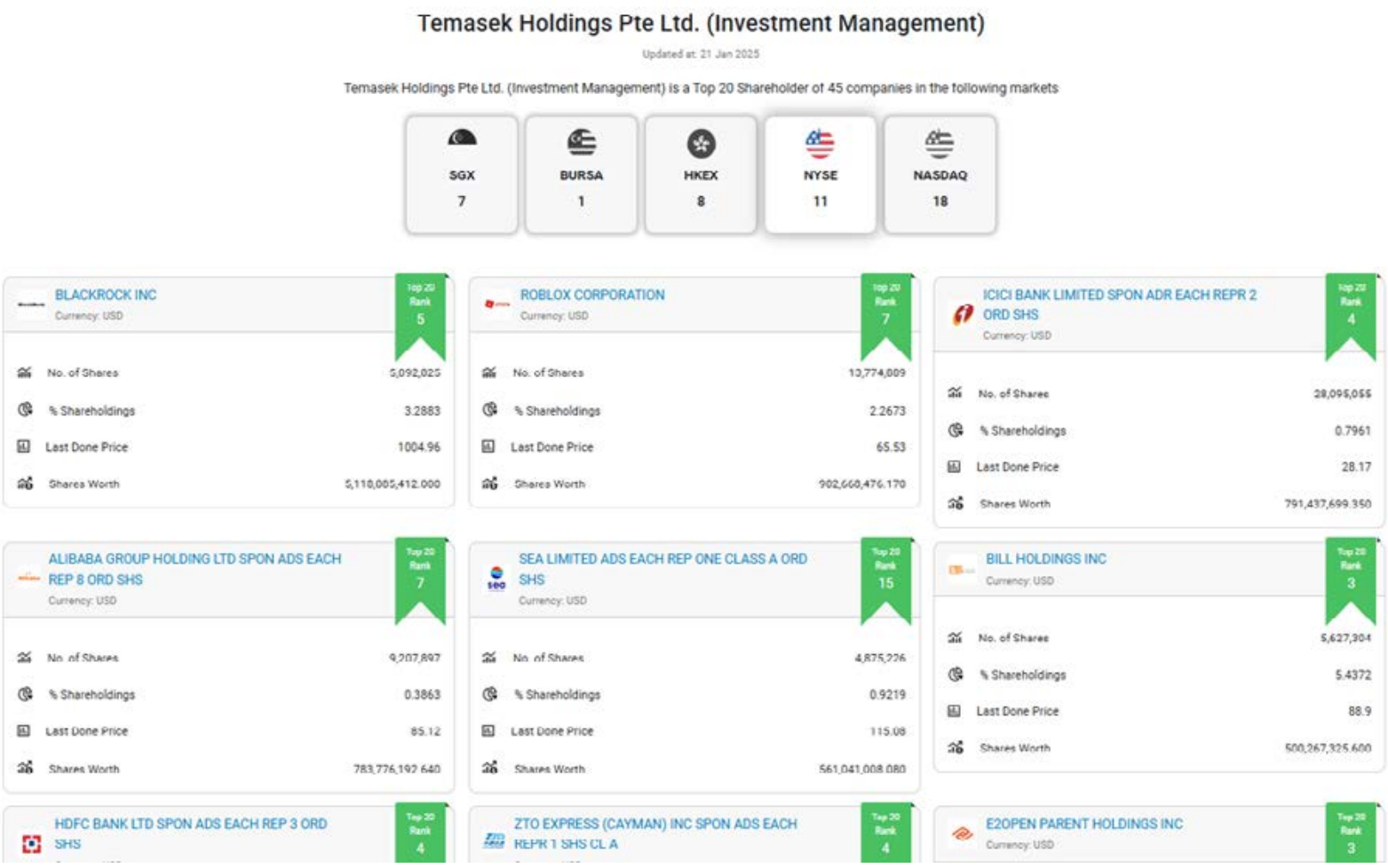
Despite the turbulence caused by the pandemic, SIA has emerged resilient, thanks to a combination of strategic equity injections and operational agility.

The airline has doubled down on its premium positioning by introducing innovative cabin products and expanding its network. Additionally, its foray into sustainable aviation fuel (SAF) aligns with global efforts to decarbonize the aviation sector.

With Temasek as its anchor shareholder, SIA enjoys a robust foundation, ensuring it remains competitive in a rapidly evolving industry. The airline's growth potential lies in capitalizing on the resurgence of air travel and further diversifying its revenue streams.

Temasek's Global Portfolio

Temasek Holdings' influence extends beyond its stake in local companies. Despite being a state-owned investment firm, it plays a strategic role in identifying thriving sectors and companies across the globe – which are also critical to Singapore's long-term economic interests.



Source: *Shareinvestor Pro*

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For instance, when you login to Shareinvestor and search for "Temasek Holdings (Investment Management)", you will see that Temasek is invested in other renowned stocks like BlackRock, Roblox, SEA Limited and even the 'obscure' Indian bank – HDFC Bank.

Utilizing ShareInvestor Pro enables retail investors to uncover numerous intriguing stock opportunities that they might otherwise overlook. Since these stocks come with extensive research, you're also benefiting from the investment knowledge of Temasek's investment team – killing 2 birds with 1 stone!

Conclusion

Significant shareholders are the unsung heroes of the investment world, shaping the trajectory of companies and industries.

By leveraging tools like ShareInvestor, retail investors can tap into the expertise of heavyweight asset management funds like Temasek Holdings, Pershing Square Capital, Berkshire Hathaway and more to identify promising opportunities.

Disclaimer: *This article is for informational purposes only and not intended as investment advice.*

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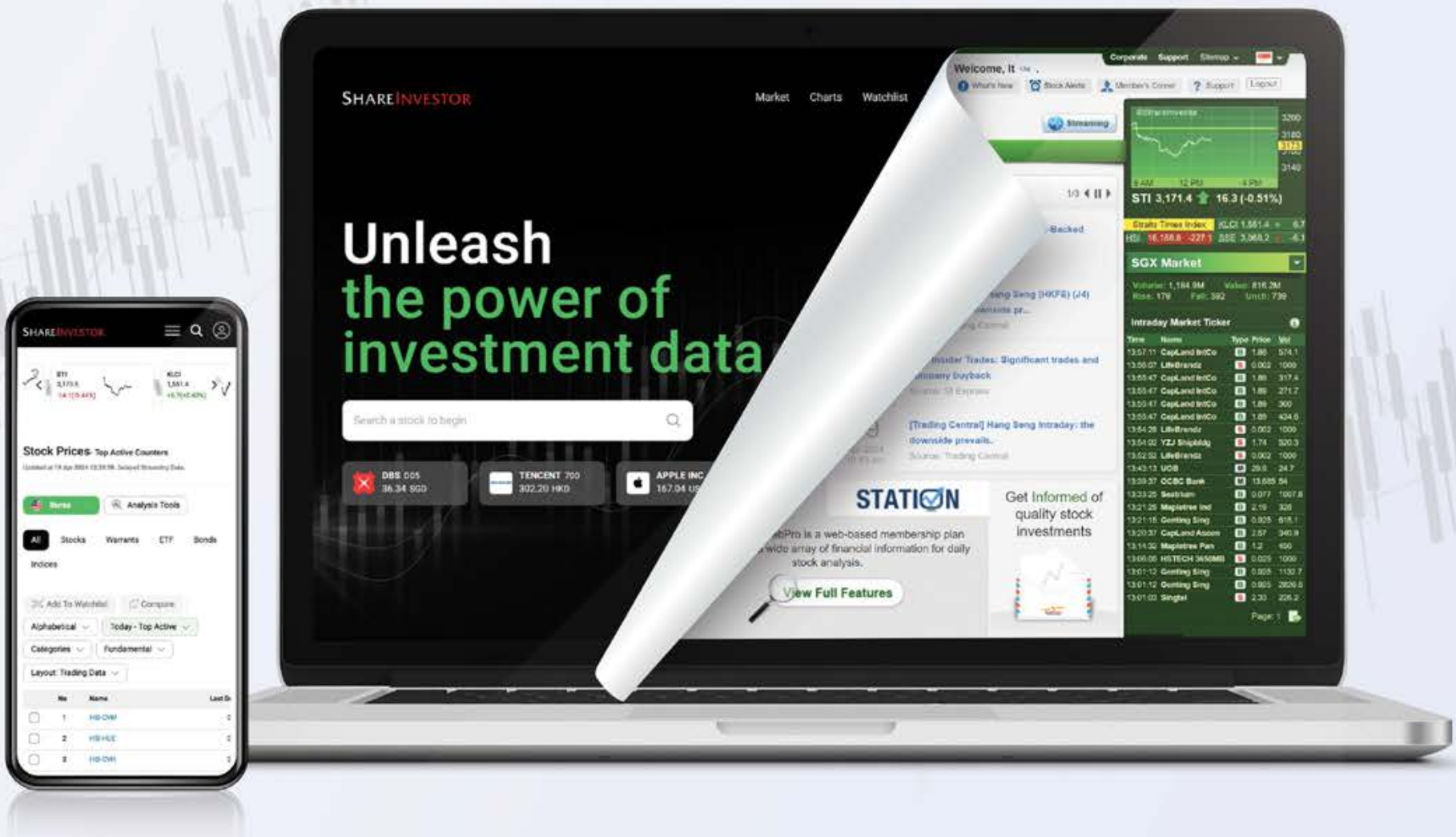
The New ShareInvestor Website



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COMPANY SPOTLIGHT

Analyst Alert: Recommendation And Consensus On Lendlease Reit, Singtel, Sembcorp Ind, Genting Sing

Investor-One / Thu, Feb 6, 8:00 PM

MAYBANK KIM ENG: Lendlease Global Comm REIT

Current Price: S$0.54 *(as of 4 February 2025)*
Target Price: S$0.65
Recommendation: BUY
Up/downside: +20%

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continued... *[Analyst Alert: Recommendation And Consensus On Lendlease Reit, Singtel, Sembcorp Ind, Genting Sing]*

Consensus Recommendation	Mean Target Price (SGD)	Consensus Rating	Number of Ratings
Overweight	0.698	1.25	6
		Upside	Upside (%)
		+0.168	+31.76

Lendlease Global Commercial REIT 1H DPU fell 14.3% YoY to SGD 1.8c due to higher finance costs and an enlarged unit base. Revenue remained stable, with near-full mall occupancy and strong rental reversions (+10.7% YTD). Portfolio occupancy rose to 92.3%, led by Sky Complex recovery. Gearing steady at 40.8%, with refinancing plans underway. We lower forecasts on slower reversions and higher debt costs but maintain BUY for its 6.2% yield and potential tourism-driven upside.

CGS CIMB: SingTel

Current Price: ***S$3.22 (as of 4 February 2025)***
Target Price: **S$3.70**
Recommendation: **ADD**
Up/downside: **+14.9%**

Consensus Recommendation	Mean Target Price (SGD)	Consensus Rating	Number of Ratings
Buy	3.716	1.16	16
		Upside	Upside (%)
		+0.506	+15.78

Singtel may raise its FY25F EBIT growth guidance to mid-to-high teens as cost cuts drive margin expansion. 3QFY25F core net profit likely hit S$660m (+12% QoQ, +18% YoY), supported by Optus and associate gains. Optus' margin rose ~180bps YoY, benefiting from price hikes and cost controls. Dividend yield (5.9%-6.5% in FY26F/27F) is backed by strong FCF and a S$12bn asset monetisation pipeline. We maintain ADD, seeing 12% core EPS CAGR and re-rating potential from EBIT growth and buybacks.

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continued... *[Analyst Alert: Recommendation And Consensus On Lendlease Reit, Singtel, Sembcorp Ind, Genting Sing]*

MAYBANK KIM ENG: Sembcorp Industries

Current Price: S$5.50 *(as of 4 February 2025)*
Target Price: S$6.20
Recommendation: BUY
Up/downside: +13.0%

Consensus Recommendation	Mean Target Price (SGD)	Consensus Rating	Number of Ratings
Buy	6.838	1.12	8
		Upside	Upside (%)
		+1.427	+26.39

SCI may miss its FY25 target of 70% net profit from Sustainable Solutions and will no longer use this metric for FY28. Strong gas sales and China's renewables imbalance have shifted the profit mix, with Sustainable Solutions' share dropping from 45% in FY21 to 31% in 1H24. Despite this, SCI maintains its 25GW renewable capacity target by FY28. Investors will focus on capital allocation (SGD 14bn capex plan) and renewables valuation in the FY24 results (27 Feb). We maintain BUY, as contracted gas sales provide earnings visibility.

CGS CIMB: Genting Singapore

Current Price: S$0.755 *(as of 3 February 2025)*
Target Price: S$1.05
Recommendation: ADD
Up/downside: +39.2%

Consensus Recommendation	Mean Target Price (SGD)	Consensus Rating	Number of Ratings
Overweight	0.998	1.39	14
		Upside	Upside (%)
		+0.258	+34.80

GENS is expected to post a 4Q24 adjusted EBITDA of S$197.4m (-13.1% YoY) due to a lower win rate and reduced room inventory from renovations. Singapore's tourism recovery lags, with Nov 2024 arrivals at 80.5% of 2019 levels, suggesting reliance on events rather

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continued... *[Analyst Alert: Recommendation And Consensus On Lendlease Reit, Singtel, Sembcorp Ind, Genting Sing]*

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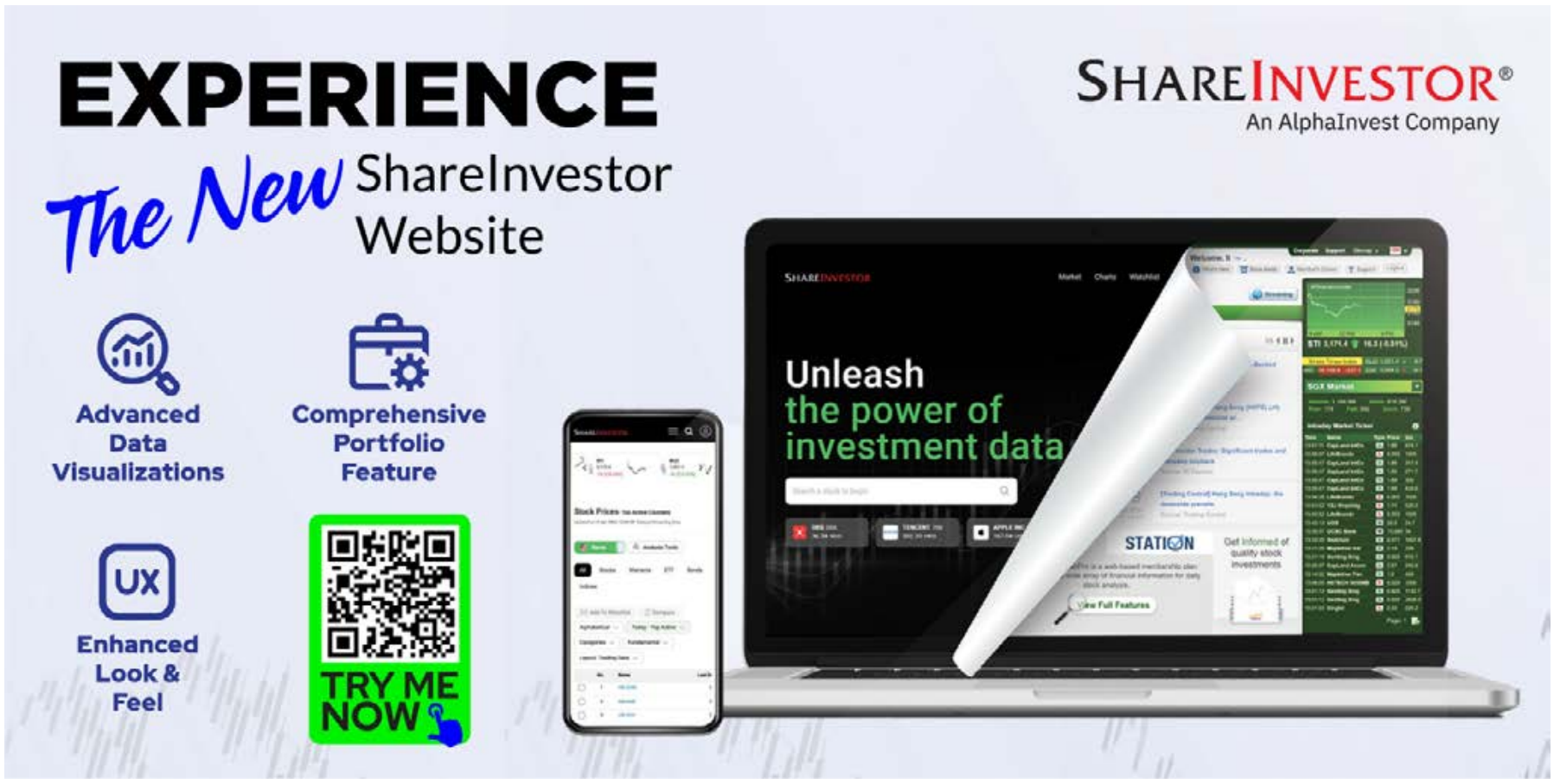
than attractions. While Marina Bay Sands benefits from expanding room inventory, GENS faces near-term challenges but should see 2H25F earnings growth from Minion Land, the revamped Hard Rock Hotel, and the Singapore Oceanarium. Trading at a 5-year-low EV/EBITDA of 5.6x, GENS offers a 5.5% yield. Re-rating catalysts: stronger win rates, tourism recovery. Risks: project delays, higher bad debts.

Disclaimer: *This article is for informational purposes only and not intended as investment advice.*



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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]
11 Feb 2025 (12 Feb 2025)	Accrelist Ltd	TERENCE TEA YEOK KIAN [Dir/CEO]	S/U	50		50		0.040	82,191	4,359	86,550	27.070
10 Feb 2025 (12 Feb 2025)	Top Glove	KUMPULAN WANG PERSARAAN (DIPERBADANKAN [SSH]	S/U		-224	-224		0.370	524,519	105,059	629,578	7.852
11 Feb 2025 (12 Feb 2025)	iWOW Tech	Soo Kee Wee [Dir/CEO]	S/U		26	26		0.193	4,722	118,139	122,861	46.690
11 Feb 2025 (12 Feb 2025)	iWOW Tech	Kau Wee Lee [SSH]	S/U	26		26		0.193	118,139	4,722	122,861	46.690
06 Feb 2025 (12 Feb 2025)	IHH	EMPLOYEES PROVIDENT FUND BOARD [SSH]	S/U	-2,365		-2,365		2.200	901,181		901,181	10.224
10 Feb 2025 (12 Feb 2025)	XMH	Tan Tin Yeow [Dir/CEO]	S/U	60		60		0.710	70,174		70,174	64.000
07 Feb 2025 (12 Feb 2025)	XMH	Tan Tin Yeow [Dir/CEO]	S/U	27		27		0.710	70,114		70,114	63.950
10 Feb 2025 (12 Feb 2025)	Prudential USD	Avnish Kalra [Dir/CEO]	S/U			0.059	GBP 6.726	8.200				
10 Feb 2025 (12 Feb 2025)	Prudential USD	Catherine Chia [Dir/CEO]	S/U			0.059	GBP 6.726	8.200				
10 Feb 2025 (12 Feb 2025)	Prudential USD	Bill Maldonado [Dir/CEO]	S/U			0.058	GBP 6.726	8.200				
10 Feb 2025 (12 Feb 2025)	Prudential USD	Solmaz Altin [Dir/CEO]	S/U			0.061	GBP 6.726	8.200				
10 Feb 2025 (12 Feb 2025)	Prudential USD	Ben Bulmer [Dir/CEO]	S/U			0.059	GBP 6.726	8.200				
10 Feb 2025 (12 Feb 2025)	Prudential USD	Kenneth Rappold [Dir/CEO]	S/U			0.061	GBP 6.726	8.200				
10 Feb 2025 (12 Feb 2025)	Prudential USD	Dennis Tan [Dir/CEO]	S/U			0.061	GBP 6.726	8.200				
10 Feb 2025 (11 Feb 2025)	Addvalue Tech^	Wang Yu Huei [SSH]	S/U	-15,000	-2,075	-17,075		0.010	145,400	1,000	146,400	4.511
11 Feb 2025 (11 Feb 2025)	GuocoLand	Cheng Hsing Yao [Dir/CEO]	R/O/W	260		260	1.000	1.450				
11 Feb 2025 (11 Feb 2025)	MarcoPolo Marine	Sean Lee Yun Feng [Dir/CEO]	S/U	1,000		1,000	0.054	0.054	13,597	166,634	180,231	4.800
07 Feb 2025 (11 Feb 2025)	DigiCore Reit USD	Cohen & Steers, Inc. [SSH]	S/U		747	747		0.530		117,343	117,343	9.040
10 Feb 2025 (11 Feb 2025)	Accrelist Ltd	TERENCE TEA YEOK KIAN [Dir/CEO]	S/U	100		100		0.039	82,141	4,359	86,500	27.060
07 Feb 2025 (11 Feb 2025)	ParkwayLife Reit	Cohen & Steers Capital Management, Inc. [SSH]	S/U		-629	-629		3.980		32,175	32,175	4.930
07 Feb 2025 (11 Feb 2025)	SGX	BlackRock, Inc. [SSH]	S/U		762	762		13.990		53,619	53,619	5.010
10 Feb 2025 (10 Feb 2025)	AcroMeta	Guo Jinyao Keith [Dir/CEO]	S/U	1,388		1,388		0.036	6,388		6,388	1.880
07 Feb 2025 (10 Feb 2025)	Suntec Reit	TANG YIGANG @ GORDON TANG [SSH]	S/U		95,161	95,161		1.170	234,932	162,503	397,435	13.550
07 Feb 2025 (10 Feb 2025)	Suntec Reit	Chen Huaidan @ Celine Tang [SSH]	S/U		95,161	95,161		1.170	237,827	162,503	400,330	13.650
07 Feb 2025 (10 Feb 2025)	iWOW Tech	Soo Kee Wee [Dir/CEO]	S/U		10	10		0.191	4,722	118,113	122,835	46.680
07 Feb 2025 (10 Feb 2025)	iWOW Tech	Kau Wee Lee [SSH]	S/U	10		10		0.191	118,113	4,722	122,835	46.680
07 Feb 2025 (10 Feb 2025)	Suntec Reit	AELIOS PTE. LTD. ("AELIOS") [SSH]	S/U	95,161		95,161		1.170	162,503		162,503	5.540
05 Feb 2025 (10 Feb 2025)	IHH	EMPLOYEES PROVIDENT FUND BOARD [SSH]	S/U	-1,807		-1,807		2.190	903,546		903,546	10.251
07 Feb 2025 (10 Feb 2025)	EliteUKREIT GBP	Liaw Liang Huat Joshua [Dir/CEO]	R/O/W	271		271		0.300				
07 Feb 2025 (07 Feb 2025)	AcroMeta	Toh Ker How Lawrence [Dir/CEO]	S/U	1,730		1,730		0.036	14,330		14,330	4.220

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IR Announcements

CapitaLand Ascott Trust: Enhances Returns With Acquisition Of 2 Hotels In Japan For JPY21 Billion.

CapitaLand Ascott Trust has acquired two freehold limited-service hotels in Japan for a total of JPY21 billion (S$178.5 million). The two hotels are ibis Styles Tokyo Ginza located in the country's capital and Chisun Budget Kanazawa Ekimae situated in Kanazawa, one of the top tourist destinations amongst domestic travellers in Japan. The acquisition is priced at an 8.3% discount to independent valuation.

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CapitaLand Investment: Expands Global Data Centre Portfolio With Development Of Its First Data Centre In Japan.

CapitaLand Investment Limited has acquired a freehold land parcel in Osaka to develop its first data centre in Japan which will entail a total investment of more than US$700 million (S$944.3 million). 50 megawatts of power capacity have also been secured for the project. The acquisition is a testament to CLI's strong global multi-asset class network and deal-sourcing capability. With this latest acquisition, CLI has added 23 data centres to its global portfolio since 2021. CapitaLand Group has 27 data centres across Asia and Europe with about 800 MW of power and around S$6 billion of assets under management on a completed basis.

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Sabana Industrial REIT: Completes Solar Panel Installations At Majority Of Its Multi-Tenanted Properties In Partnership With Keppel EaaS.

All nine of the REIT's properties are capable of being powered fully or partially by renewable energy. Ongoing review of further sustainability solutions and initiatives for the REIT's portfolio. The REIT is poised to become one of Singapore's first carbon neutral industrial REITs by 2040.

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CICT: Achieves Positive 2H 2024 Performance With Distributable Income Up 6.4% Year-On-Year To S$385.7 Million.

CapitaLand Integrated Commercial Trust announced a distributable income growth of 6.4% year-on-year to S$385.7 million for the six months ended 31 December 2024, compared to S$362.5 million in 2H 2023. This positive momentum is mainly driven by the acquisition of a 50.0% interest in ION Orchard, better performance of its existing operating properties as well as prudent management of operating and interest costs, partly offset by the divestment of 21 Collyer Quay.

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OUE Healthcare: Announces Strategic Partnership With Renowned Zhongda Hospital Southeast University.

OUE Healthcare Limited 's joint venture hospital with the China Merchants Group, Changshu China Merchants - Lippo Obstetrics & Gynaecology Hospital in Changshu, Jiangsu Province, China, signed a strategic partnership agreement with Zhongda Hospital Southeast University, a renowned public Grade 3A General Hospital in Nanjing, Jiangsu Province, China.

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IR Announcements

Parkway Life REIT: Delivers 17 Years Of Uninterrupted Growth In Recurring DPU.

Full Year Growth in Distribution Per Unit of 1.0%, reaching 14.92 cents for FY 2024. Excluding the impact of equity funding raising, DPU for 2024 would have been 2.3% higher than last year. Remains committed to Singapore while diversifying out of Japan into a 3rd key market. Strategic foray into the European region with an acquisition of 11 nursing homes properties in France at approximately 3.7% below valuation. Successful maiden EFR via private placement of approximately S$180.0 million to fully finance the France acquisition. Healthy Gearing Ratio of 34.8%, with no long-term debt refinancing needs until September 2026.

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CLCT: Posts FY2024 Net Property Income Of RMB1,219.1 Million, Supported By Stronger Retail Performance.

Retail portfolio, CLCT's largest asset class, was boosted by a 13.7% increase in net property income of three malls post-AEI. Maintained business parks occupancy above or in line with market performance, while stabilising logistics parks portfolio despite a challenging environment. Achieved 100% occupancy for Shanghai Fengxian Logistics Park with new master-lease tenant secured in December 2024.

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CapitaLand Ascendas REIT: Distributable Income For FY2024 Increases By 2.2% Year-On-Year To S$668.8 Million.

FY 2024 Distribution per Unit rose by 0.3% year-on-year to 15.205 Singapore cents. This was supported by the full-year contribution from properties acquired and completed in FY 2023 and the portfolio's robust operational performance. Portfolio occupancy was healthy at 92.8% and leases renewed in FY 2024 achieved a high positive average rental reversion of 11.6%. The Singapore-anchored portfolio underpinned a stable valuation of S$16.8 billion.

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ISOTeam: Secures S$36.4 Million In New Projects, Maintains Robust Order Book Of S$188.7 Million.

ISOTeam Ltd. has secured 25 new contracts worth a total of S$36.4 million. These latest project wins have strengthened the Group's order book to S$188.7 million to date, reinforcing its continued growth momentum and strong market position.

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Perennial: Unveiling Aurea, Modern Living Inspired By Iconic Heritage.

188 exclusive homes ranging from two- to six-bedrooms, including two luxurious duplex and triplex penthouses from the Sky Villa Collection. Preview begins 22 February 2025 with the official launch on 8 March 2025. Aurea's design pays tribute to The Golden Mile's architectural legacy while elevating modern living with lush tropical features and panoramic views. Pricing starts from $1.92 million or $2,750 psf.

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