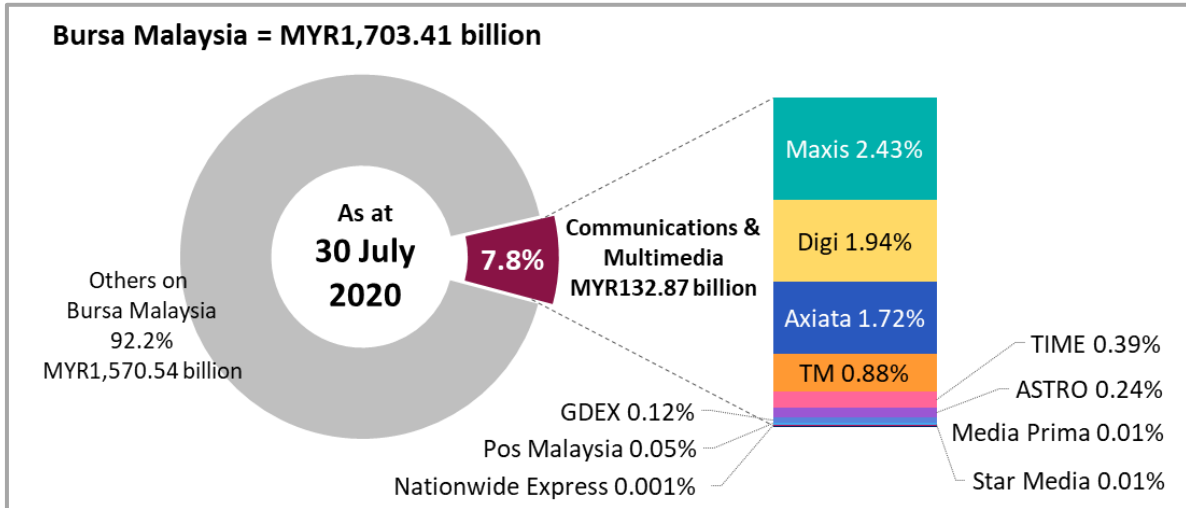


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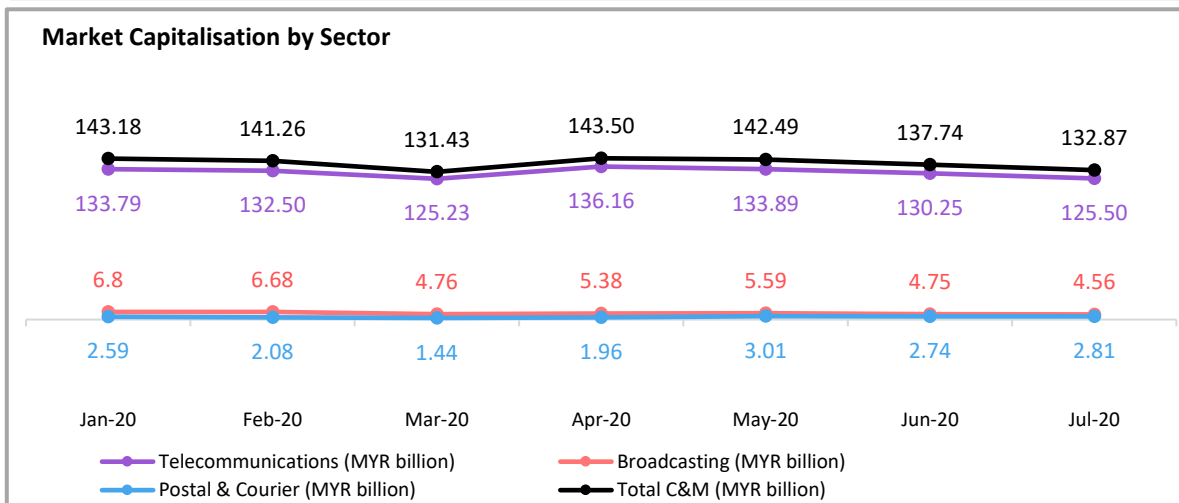
C&M industry represents 7.8% of Bursa Malaysia market capitalisation



Source: Bursa Malaysia (data extracted as at 17 August 2020), Bloomberg, MCMC

- Communications & Multimedia industry posted RM132.87 billion in market capitalisation or 7.8% of total Bursa Malaysia's market capitalisation of RM1,703.41 billion.
- The telecommunications sector is led by Maxis and Digi at 2.43% and 1.94% respectively.

Resilient economic position for Malaysia C&M Industry



Source: Bloomberg, MCMC

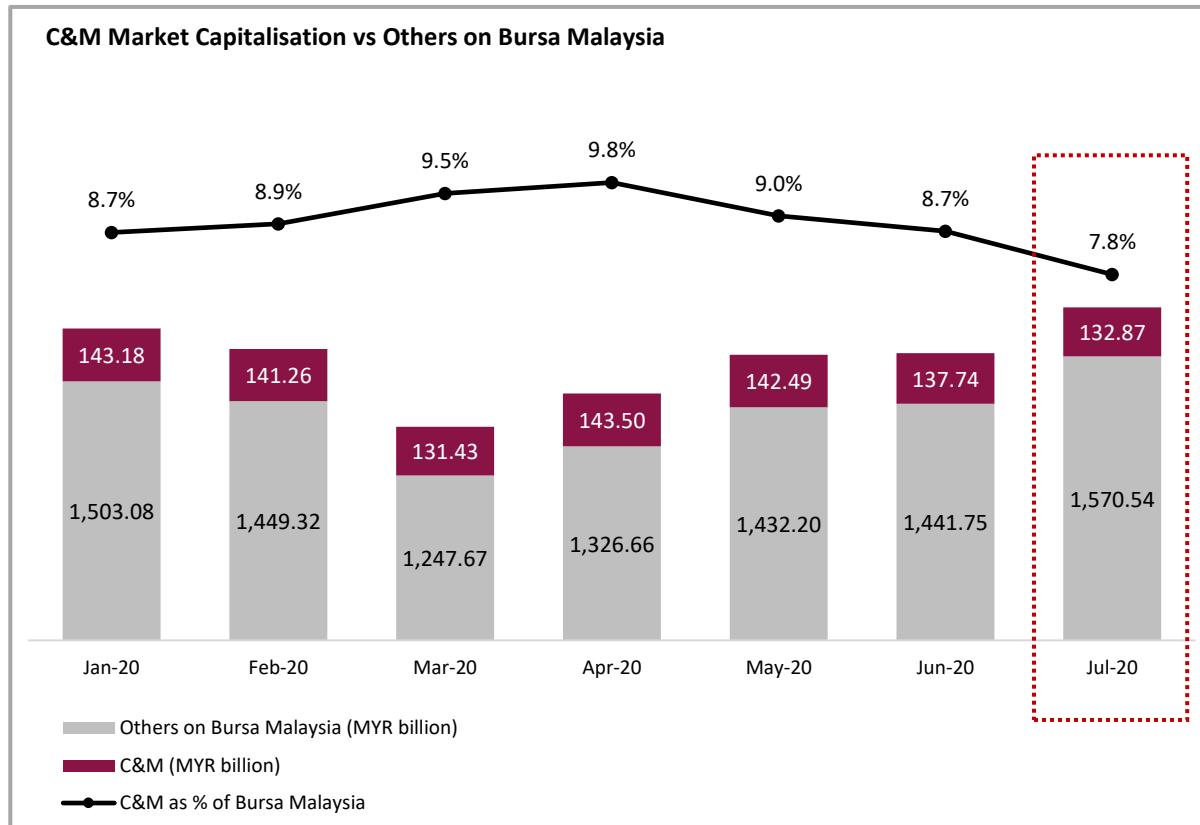
- Market Capitalisation by sectors
 - Telecommunications – RM125.50 billion
 - Broadcasting – RM4.56 billion
 - Postal & Courier – RM2.81 billion
- Postal & Courier sector recorded a healthy growth of 43% in market capitalisation since April 2020.
- Following the new norm of working from home and online shopping, parcel deliveries experienced a surge in demand throughout this period. In Q2 2020, domestic courier service traffic rose approximately by 60%, compared with Q1 2020.

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C&M market capitalisation at RM132.87 billion



Source: Bursa Malaysia (data extracted as at 17 August 2020), Bloomberg, MCMC

- Percentage share of C&M industry on Bursa Malaysia declined to 7.8% in July 2020 (January 2020: 8.7%)
- The C&M market capitalisation has been declining since May 2020. This is due to the impact of COVID-19 which led to overall decrease in economic activity, thus reducing telecommunications service revenue¹. Other factors included investors' sentiment and reduction of dividends.

Note:

1. Service revenue referring to revenue from postpaid and prepaid services, including roaming

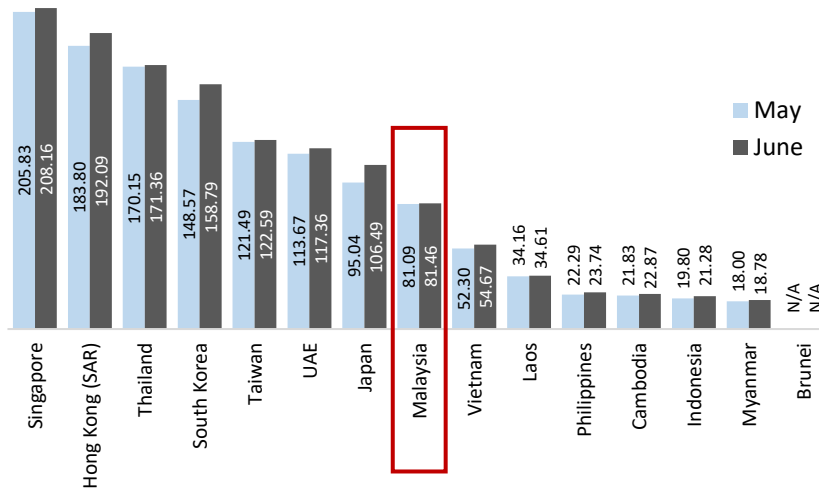


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Malaysia is ranked #3 in ASEAN for fixed-broadband average download speed

Fixed-Broadband Average Download Speed by ASEAN and Selected Countries (Mbps), May - June 2020



Source: Speedtest Global Index

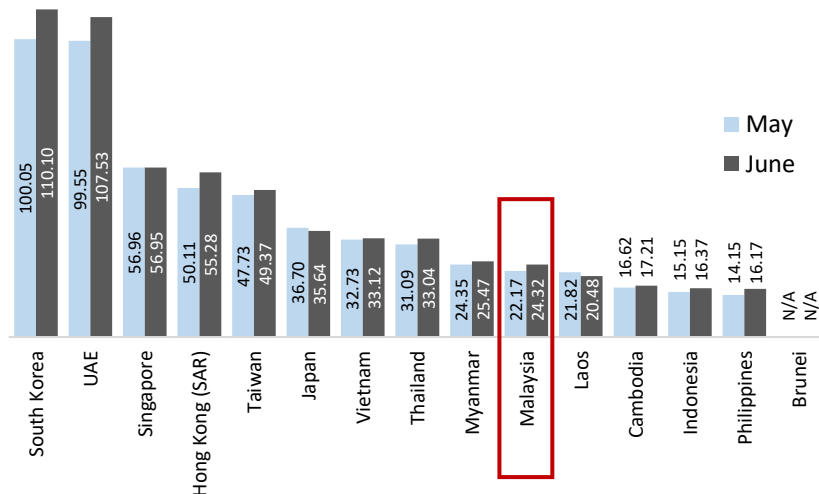
- Malaysia is ranked #40 worldwide (declined from #39 in May 2020)
- Malaysia is ranked #3 in ASEAN (maintained its position since May 2020)

Average Download Speed, June 2020 (Δ change from May)

# World Ranking	Country	Mbps
1 (+0)	Singapore	208.16 (+2.33)
2 (+0)	Hong Kong (SAR)	192.09 (+8.29)
3 (+0)	Thailand	171.36 (+1.21)
7 (+1)	South Korea	158.79 (+10.22)
20 (+0)	Taiwan	122.59 (+1.10)
23 (+0)	UAE	117.36 (+3.69)
30 (+2)	Japan	106.49 (+11.45)
40 (-1)	Malaysia	81.46 (+0.37)
60 (-1)	Vietnam	54.67 (+2.37)
84 (-5)	Laos	34.61 (+0.45)
108 (+3)	Philippines	23.74 (+1.45)
110 (+2)	Cambodia	22.87 (+1.04)
114 (+3)	Indonesia	21.28 (+1.48)
121 (+2)	Myanmar	18.78 (+0.78)
NA ()	Brunei	NA

Malaysia is ranked #5 in ASEAN for mobile-broadband average download speed

Mobile-Broadband Average Download Speed by ASEAN and Selected Countries (Mbps), May - June 2020



Source: Speedtest Global Index

- Malaysia is ranked #82 worldwide (improved 7 position compared to May 2020)
- Malaysia is ranked #5 in ASEAN (maintained its position since May 2020)

Average Download Speed, June 2020 (Δ change from May)

# World Ranking	Country	Mbps
1 (+0)	South Korea	110.10 (+10.05)
2 (+0)	UAE	107.53 (+7.98)
14 (-1)	Singapore	56.95 (-0.01)
17 (+2)	Hong Kong (SAR)	55.28 (+5.17)
27 (+3)	Taiwan	49.37 (+1.64)
50 (-4)	Japan	35.64 (-1.06)
60 (+0)	Vietnam	33.12 (+0.39)
61 (+2)	Thailand	33.04 (+1.95)
77 (+3)	Myanmar	25.47 (+1.12)
82 (+7)	Malaysia	24.32 (+2.15)
96 (-4)	Laos	20.48 (-1.34)
109 (-1)	Cambodia	17.21 (+0.59)
113 (+3)	Indonesia	16.37 (+1.22)
114 (+8)	Philippines	16.17 (+2.02)
NA ()	Brunei	N/A