LAPORAN PASARAN HARTA WILAYAH TENGAH
2023

CENTRAL REGION PROPERTY MARKET REPORT
2023

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SELAT MELAKA
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PETA INI BUKANLAH KUASA BAGI PENENTUAN SEMPADAN
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NEGERI SEMBILAN
MELAKA
JOHOR
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SINGAPORE
WILAYAH PERSEKUTUAN PUTRAJAYA
SELANGOR

CENTRAL REGION

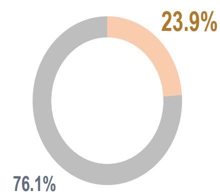
MARKET ACTIVITY

Volume, Value Transactions & Yearly Change (2023 vs 2022)

▲ 1.6% Volume **95,358** transaction Value **RM79.49** billion ▲ 0.8%

Residential	Commercial	Industrial	Agriculture	Development Land & Others
69,117 units -1.3%	16,412 units 21.9%	2,750 units -4.5%	4,343 units 3.5%	2,736 units -15.7%
RM42.12 billion -1.6%	RM19.24 billion 0.4%	RM12.24 billion 15.0%	RM1.61 billion -9.1%	RM4.29 billion -4.3%

Market Share between Regions (Volume)



Construction Activity

	Residential	Shop	Service Apartments	Industrial
Completion	29,464	301	21,988	134
Starts	34,861	967	11,398	158
New Planned Supply	32,434	999	11,715	590

Unsold Starts

	Residential	Shop	Service Apartments	Industrial
Overhang	7,077 units @ RM7.54 billion	406 units @ RM0.48 billion	6,955 units @ RM5.77 billion	45 units @ RM0.11 billion
Unsold Under Construction	12,620	461	15,748	155
Unsold Not Constructed	4,804	16	5,742	0

1.0 GAMBARAN KESELURUHAN PASARAN HARTA TANAH WILAYAH TENGAH

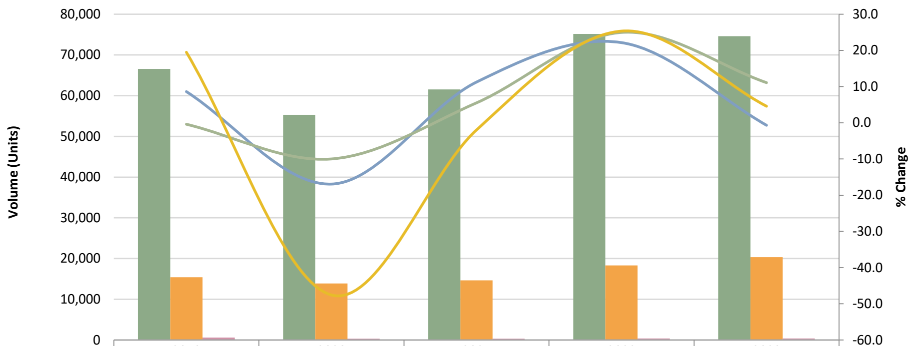
Aktiviti pasaran harta tanah Wilayah Tengah merekodkan sebanyak 95,358 transaksi bernilai RM79.49 bilion, peningkatan sedikit masing-masing 1.6% dan 0.8% dalam bilangan dan nilai berbanding tempoh yang sama tahun lalu. Digabungkan, ketiga-tiga negeri ini membentuk 23.9% dan 40.4% bilangan dan nilai transaksi negara.

1.0 CENTRAL REGION PROPERTY MARKET OVERVIEW

The Central Region property market activity recorded a total of 95,358 transactions worth RM79.49 billion, with marginal growth by 1.6% and 0.8% in volume and value respectively as compared to corresponding period. Combined, these three states formed 23.9% and 40.4% of the national volume and value of transactions.

Chart 1

Overall Property Transactions Volume Trend 2019 – 2023



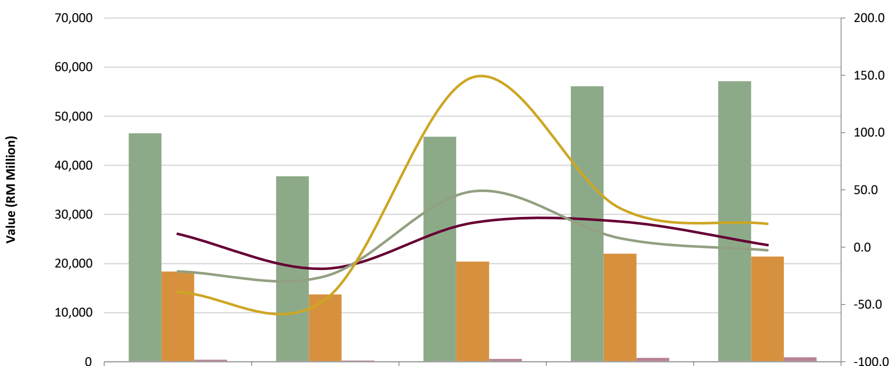
	2019	2020	2021	2022	2023
Selangor	66,548	55,286	61,507	75,135	74,626
Kuala Lumpur	15,427	13,887	14,652	18,312	20,344
Putrajaya	576	302	296	371	388
Selangor	8.6	-16.9	11.3	22.2	-0.7
Kuala Lumpur	-0.4	-10.0	5.5	25.0	11.1
Putrajaya	19.5	-47.6	-2.0	25.3	4.6

Dari segi bilangan transaksi, Kuala Lumpur dan Putrajaya menunjukkan aliran meningkat masing-masing sebanyak 11.1% dan 4.6%. Manakala Selangor menunjukkan sedikit penurunan sebanyak 0.7%.

In terms of transaction volume, Kuala Lumpur and Putrajaya showed an upward trend by 11.1% and 4.6% respectively. While Selangor shown slightly down at 0.7%.

Chart 2

Overall Property Transactions Value Trend 2019 – 2023



	2019	2020	2021	2022	2023
Selangor	46,523.89	37,795.35	45,820.53	56,093.34	57,146.58
Kuala Lumpur	18,370.49	13,719.64	20,404.97	22,003.71	21,415.20
Putrajaya	427.72	232.41	576.99	773.37	931.13
Selangor	11.6	-18.8	21.2	22.4	1.9
Kuala Lumpur	-21.2	-25.3	48.7	7.8	-2.7
Putrajaya	-39.1	-45.7	148.3	34.0	20.4

Dari segi nilai transaksi, Putrajaya dan selangor menunjukkan peningkatan masing-masing sebanyak 20.4% dan 1.9%, manakala Kuala Lumpur menurun sedikit sebanyak 2.7% berbanding tempoh yang sama tahun lalu.

In terms of transaction value, Putrajaya and Selangor shown an increased by 20.4% and 1.9% respectively, while Kuala Lumpur decreased slightly by 2.7% compared to the same period last year.

Chart 3

Overall Property Transactions Volume Breakdown by State 2023

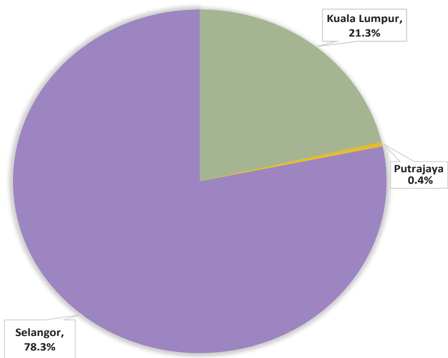
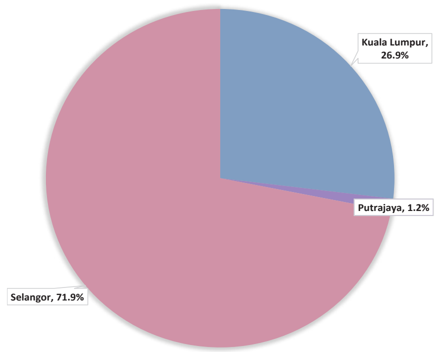


Chart 4

Overall Property Transactions Value Breakdown by State 2023



2

Mengikut negeri, Selangor menguasai keseluruhan transaksi harta tanah dengan 78.3% dalam bilangan (74,626 transaksi) dan 71.9% dalam nilai (RM57.15 bilion) daripada jumlah keseluruhan transaksi Wilayah Tengah.

By state, Selangor dominated the region's overall property transactions with 78.3% in volume (74,626 transactions) and 71.9% in value (RM57.15 billion) of the total transactions Central Region.

Chart 5

Overall Property Transactions Volume Breakdown by Sub-sector 2023

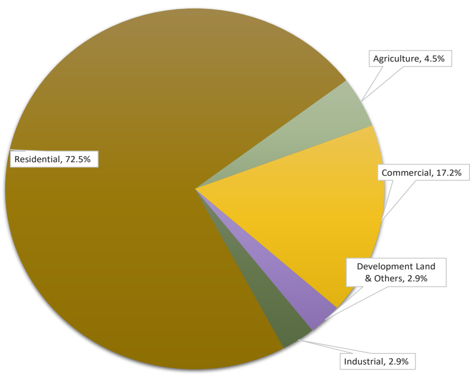
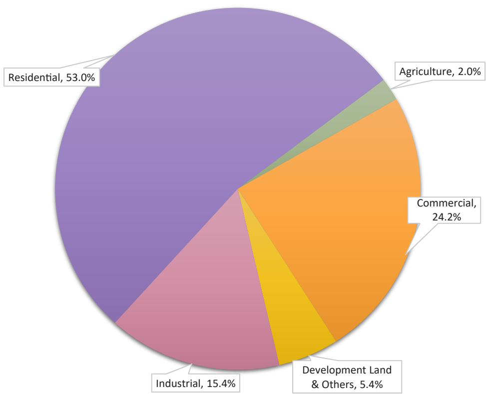


Chart 6

Overall Property Transactions Value Breakdown by Sub-sector 2023



Mengikut subsektor, kediaman terus mendominasi transaksi harta tanah dalam wilayah, menyumbang 72.5% (69,117 transaksi) daripada jumlah keseluruhan. Begitu juga, subsektor kediaman mendominasi nilai transaksi harta tanah keseluruhan wilayah dengan syer 53.0%.

By sub-sector, residential continued to dominate the region's property transactions, contributing 72.5% (69,117 transactions) of the total. Likewise, residential sub-sector dominated the region's overall property transaction value with 53.0% share.

Table 1
Summary of Prominent Sales in 2023

No.	Property	Location	Transaction Year	Consideration (RM)
		PURPOSE-BUILT OFFICE (PBO)		
1	Menara HSBC	No. 6, Leboh Ampang, Kuala Lumpur	2023	55,000,000.00
2	Blok B Plaza Damansara	Bukit Damansara, Kuala Lumpur	2023	73,000,000.00
3	Menara AA	Jalan Tun Razak, Kuala Lumpur	2023	81,000,000.00
4	Menara Tulus	Presint 3, Putrajaya	2023	148,000,000.00
5	Qi Tower	Block C, Jalan Barat, Section 8, Petaling Jaya, Selangor	2023	88,810,000.00
6	Blok A, Wisma Speedy	Taman Ampang Hilir, Ampang, Selangor	2023	10,380,000.00
7	Blok C, Lot 6875	Jalan Kolam Air Lama, Ampang Jaya, Selangor	2023	14,000,000
8	Plaza VADS	Taman Tun Dr Ismail, Kuala Lumpur	2022	137,300,000.00
9	The Weld	Jalan Raja Chulan, Kuala Lumpur	2022	305,000,000.00
10	Cyberview Gardens Villa	Cyberview Gardens, Persiaran Multimedia, Cyberjaya	2022	57,500,000.00
11	Emerio Building Cyberjaya	Lingkaran Teknokrat 3, Cyberjaya	2022	49,000,000.00
12	Blok A dan B, Lot 15686	Jalan Kolam Air Lama, Ampang Jaya, Selangor	2022	21,000,000
13	Data Centre NTT MSC (CBJ 5)	Persiaran APEC, Cyberjaya	2021	319,800,000.00
		SHOPPING COMPLEX		
14	Giant Kemuning Utama	Jalan Kemuning Prima E33/E, Kemuning Utama, Selangor	2023	45,000,000.00
15	Giant Putra Permai	Jalan Putra Permai, Taman Putra Permai, Selangor	2023	50,419,000.00
16	Econsave Puncak Alam	No. 3 , Jalan PPAJ 5, Pusat Perdagangan Alam Jaya, Puncak Alam, Selangor	2023	25,000,000.00
17	Econsave Batang Kali	Lot 23170, Jalan Mahagoni 8, Bandar Utama Batang Kali, Selangor	2023	24,500,000.00
18	Tropicana City Mall	Jalan SS 20/27, Tropicana City Tropics, Selangor	2023	52,000,000.00
19	Kip Mall Kota Warisan	Jalan Warisan Sentral 3, Kip Sentral Kota Warisan, Selangor	2023	80,000,000.00
20	Giant Seksyen 18	Jalan Pinang D, Seksyen 18, Shah Alam, Petaling	2021	12,500,000.00
21	Giant Setapak	Jalan Kilang, Wangsa Maju, Kuala Lumpur	2023	101,000,000.00
		HOTEL		
22	Stripes Hotel	Jalan Kamunting, Chow Kit, Kuala Lumpur	2023	138,000,000.00

2.0 AKTIVITI PASARAN HARTA TANAH

2.1 HARTA TANAH KEDIAMAN

Transaksi

Prestasi pasaran subsektor kediaman Wilayah Tengah sedikit perlahan pada 2023, ditunjukkan oleh pengucupan aktiviti pasaran. Wilayah ini mencatatkan 69,117 transaksi bernilai RM42.12 bilion, masing-masing menurun 1.3% dan 1.6% berbanding 2022.

2.0 PROPERTY MARKET ACTIVITY

2.1 RESIDENTIAL PROPERTY

Transaction

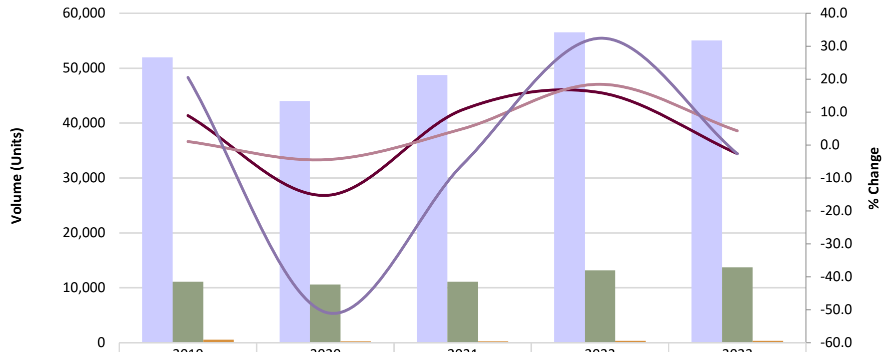
The Central Region residential property market performance softened in 2023, indicated by the contraction in market activities. The region registered 69,117 transactions worth RM42.12 billion, decreased by 1.3% and 1.6% in volume and value respectively as compared to 2022.

Prestasi mengikut negeri adalah bercampur-campur. Putrajaya dan Selangor merekodkan bilangan transaksi yang lebih rendah menurun masing-masing 2.7% dan 2.6%. Manakala Kuala Lumpur mencatatkan peningkatan bilangan transaksi 4.3%.

States performances were mixed. Putrajaya and Selangor recorded lower volume of transactions by 2.7% and 2.6% respectively. Meanwhile Kuala Lumpur recorded increasing of transactions volume by 4.3%.

Chart 7

Residential Property Transactions Volume Trend 2019 – 2023



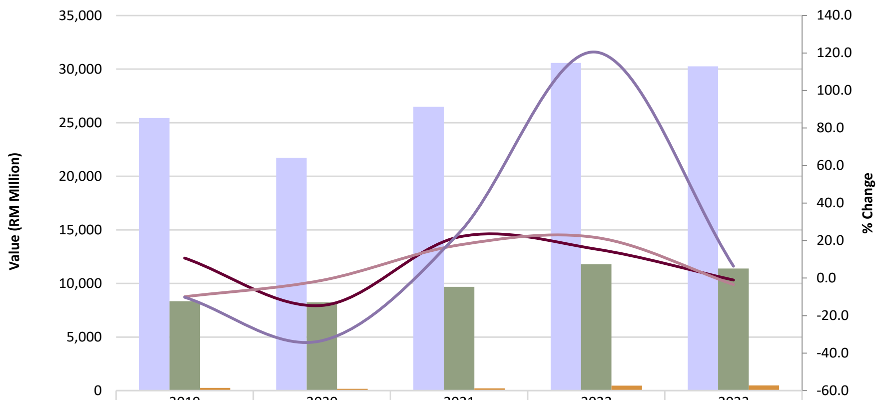
	2019	2020	2021	2022	2023
Selangor	51,981	44,034	48,755	56,514	55,035
Kuala Lumpur	11,100	10,606	11,129	13,182	13,752
Putrajaya	552	272	256	339	330
Selangor	8.9	-15.3	10.7	15.9	-2.6
Kuala Lumpur	1.1	-4.5	4.9	18.4	4.3
Putrajaya	20.5	-50.7	-5.9	32.4	-2.7

Daripada segi nilai transaksi, Kuala Lumpur dan Selangor menunjukkan trend menurun masing-masing 3.4% dan 1.1%, manakala Putrajaya meningkat 6.3%.

In terms of transaction value, Kuala Lumpur and Selangor states showed downward trend 3.4% and 1.1% respectively, while Putrajaya increase by 6.3%.

Chart 8

Residential Property Transactions Value Trend 2019 – 2023



	2019	2020	2021	2022	2023
Selangor	25,432.08	21,722.49	26,490.71	30,578.01	30,255.16
Kuala Lumpur	8,338.76	8,237.78	9,691.72	11,786.10	11,381.42
Putrajaya	248.21	165.34	205.13	452.27	480.94
Selangor	10.7	-14.6	22.0	15.4	-1.1
Kuala Lumpur	-9.9	-1.2	17.6	21.6	-3.4
Putrajaya	-10.2	-33.4	24.1	120.5	6.3

Pelancaran Baharu

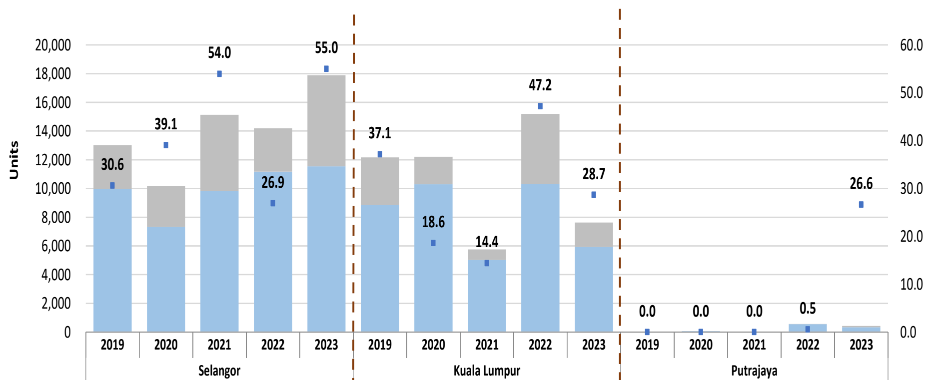
Pasaran utama di Wilayah Tengah menyaksikan prestasi merosot bagi pelancaran baharu di Kuala Lumpur dan Putrajaya. Kuala Lumpur merekodkan 5,927 pelancaran baharu, menurun 42.6% berbanding 2022 (10,324 unit), sementara Putrajaya menurun 38.2% kepada 338 unit (2022: 547 unit). Selangor mencatatkan 11,542 unit pelancaran baharu berbanding 11,176 unit pada 2022, meningkat 3.3%.

New Launches

The Central Region primary market declined for new launches in Kuala Lumpur and Putrajaya. Kuala Lumpur recorded 5,927 new launches, decreased by 42.6% compared to 2022 (10,324 units), meanwhile Putrajaya decreased by 38.2% to 338 units (2022: 547 units). Selangor recorded 11,542 units new launches compared to 11,176 units in 2022, increased by 3.3%.

Chart 9

Residential Newly Launch and Sales Performance



	Selangor 2019	Selangor 2020	Selangor 2021	Selangor 2022	Selangor 2023	Kuala Lumpur 2019	Kuala Lumpur 2020	Kuala Lumpur 2021	Kuala Lumpur 2022	Kuala Lumpur 2023	Putrajaya 2019	Putrajaya 2020	Putrajaya 2021	Putrajaya 2022	Putrajaya 2023
Unit Sold	3,053	2,863	5,302	3,006	6,348	3,293	1,916	725	4,870	1,700	0	0	0	3	90
Unit Launches	9,970	7,330	9,827	11,176	11,542	8,865	10,295	5,029	10,324	5,927	0	64	0	547	338
Sales Performance (%)	30.6	39.1	54.0	26.9	55.0	37.1	18.6	14.4	47.2	28.7	0.0	0.0	0.0	0.5	26.6

Status Pasaran

Situasi unit kediaman siap dibina tidak terjual menyaksikan pergerakan bercampur dalam tempoh kajian. Selangor dan Putrajaya masing-masing mencatatkan 3,405 unit dan 137 unit, berkurang 7.9% dan 40.7% berbanding 2022 (Selangor 3,698 unit; Putrajaya 231 unit). Sementara itu, unit siap dibina tidak terjual di Kuala Lumpur meningkat 3.1% kepada 3,535 unit berbanding 2022 (3,429 unit).

Unit dalam pembinaan belum terjual di Wilayah Tengah menurun 27.0% (12,620 unit) berbanding 2022 (17,280 unit). Sementara itu, unit belum dibina belum terjual juga menurun 9.8% (4,804 unit) berbanding 2022 (5,323 unit).

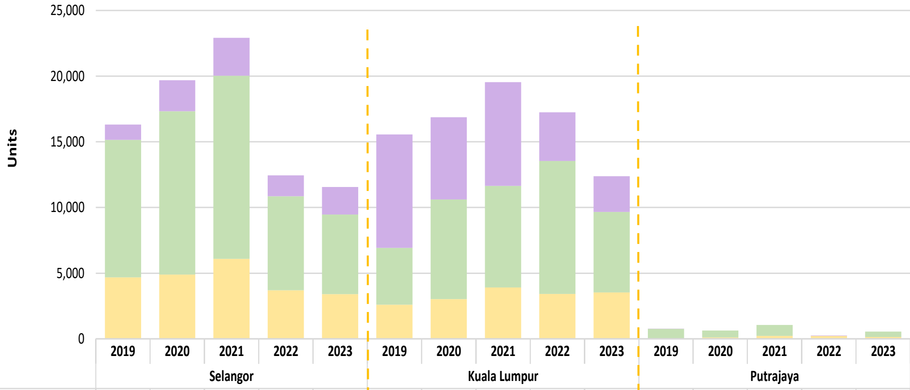
Market Status

The residential overhang situation saw mixed movements in the review period. Selangor and Putrajaya charted 3,405 units and 137 units respectively, reduced by 7.9% and 40.7% compared to 2022 (Selangor 3,698 units; Putrajaya 231 units). Meanwhile, overhang unit in Kuala Lumpur increase 3.1% to 3,535 units compared to 2022 (3,429 units).

The unsold under construction unit in the Central Region reduced by 27.0% (12,620 units) compared to 2022 (17,280 units). Meanwhile the unsold not constructed decreased by 9.8% (4,804 units) compared to 2022 (5,323 units).

Chart 10

Residential Overhang and Unsold Units 2021 – 2023



	Selangor 2019	2020	2021	2022	2023	Kuala Lumpur 2019	2020	2021	2022	2023	Putrajaya 2019	2020	2021	2022	2023
Unsold Not Constructed	1,156	2,360	2,885	1,598	2,090	8,645	6,249	7,906	3,700	2,714	13	0	0	25	0
Unsold Under Construction	10,472	12,449	13,935	7,160	6,068	4,317	7,593	7,737	10,120	6,128	769	522	826	0	424
Overhang	4,687	4,889	6,095	3,698	3,405	2,605	3,023	3,908	3,429	3,535	0	114	230	231	137

Aktiviti Pembinaan

Unit siap dibina di Wilayah Tengah merekodkan penurunan 9.5% pada tahun 2023 (29,464 unit) berbanding 2022 (32,543 unit). Mengikut negeri, Putrajaya dan Selangor meningkat masing-masing 16.8% dan 8.6 % berbanding 2022, manakala Kuala Lumpur menunjukkan penurunan 39.3%.

Unit mula dibina di Selangor dan Kuala Lumpur merekodkan peningkatan sedikit, masing-masing naik 8.8% dan 4.9%. Walaubagaimanapun, penawaran baharu dirancang di Kuala Lumpur dan Selangor masing-masing menunjukkan penurunan 44.6% dan 5.5% berbanding 2022.

Unit mula bina dan penawaran baharu dirancang di Putrajaya kekal tiada pada tahun 2023.

Construction Activity

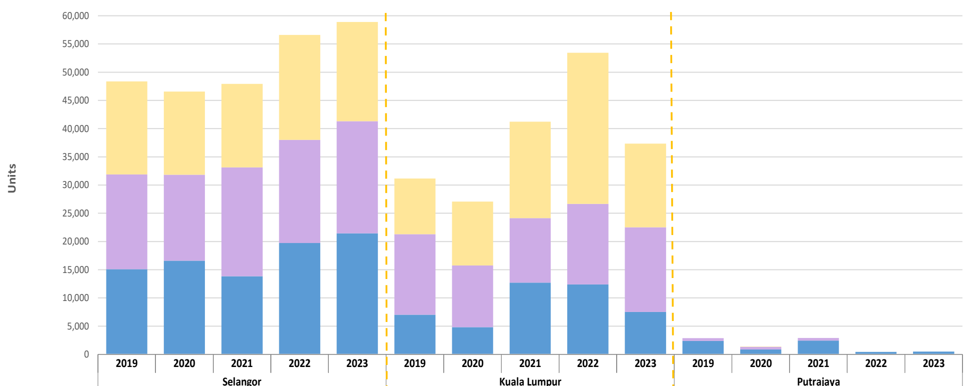
Central Region completion recorded a 9.5% decreased in 2023 (29,464 units) compared to 2022 (32,543 units). By state, Putrajaya and Selangor increased by 16.8% and 8.6% respectively compared to 2022, while, Kuala Lumpur showed a decrease of 39.3%.

Starts in Selangor and Kuala Lumpur recorded a marginal increase, up by 8.8% and 4.9% respectively. However, new planned supply in Kuala Lumpur and Selangor showed a declined by 44.6% and 5.5% respectively against 2022.

Both starts and new planned supply in Putrajaya remained nil in 2023.

Chart 11

Residential Construction Activity Trend 2021 – 2023



	Selangor 2019	2020	2021	2022	2023	Kuala Lumpur 2019	2020	2021	2022	2023	Putrajaya 2019	2020	2021	2022	2023
New Planned Supply	16,480	14,750	14,808	18,622	17,593	9,874	11,321	17,068	26,769	14,841	0	64	0	0	0
Starts	16,810	15,231	19,283	18,253	19,865	14,286	10,941	11,432	14,290	14,996	500	468	463	0	0
Completion	15,087	16,594	13,853	19,741	21,448	7,010	4,807	12,719	12,374	7,516	2,379	858	2,450	428	500

Table 2

Construction Activity of Residential in Central Region 2023

Stage of Development / State	Selangor	Kuala Lumpur	Putrajaya
Existing Supply (units)	1,695,545	544,892	18,396
Incoming Supply (units)	87,946	48,395	2,512
Planned Supply (units)	79,672	58,465	3,252

Harga

Harga harta tanah kediaman dalam tahun 2023 menunjukkan pergerakan bercampur-campur secara keseluruhan. Rumah teres dua tingkat di skim yang mantap seperti Elmina East, USJ 5 dan USJ 2 di Daerah Petaling, Selangor masing-masing menikmati peningkatan 9.7%, 9.6% dan 8.3% dipindahmilik antara RM0.70 juta hingga RM1.18 juta. Bagi jenis harta tanah yang sama di Kuala Lumpur, peningkatan modal dua digit direkodkan di Taman Bukit Maluri (12.2%), Taman Megah Kepong (11.2%), Taman Mastiara dan Bandar Menjalara (11.0%) serta Taman Seputeh (10.7%) yang dipindahmilik antara RM0.80 juta hingga RM1.90 juta.

Di segmen kediaman bertingkat tinggi, prestasi kukuh telah direkodkan. Di Kuala Lumpur, kondominium/ pangsapuri yang terletak berdekatan pusat bandar dan dilengkapi jaringan jalan yang baik menunjukkan peningkatan antaranya Pelangi Indah Condo (14.0%), Pavilion Hiltop Mont Kiara (13.6%), Park Seven (13.4%) dan Suasana Bangsar Condominium (9.7%).

Sementara itu, kondominium/ pangsapuri di beberapa skim di Selangor menyaksikan peningkatan di antara 7.0% hingga 7.8%. Walau bagaimanapun, terdapat beberapa penurunan di skim terpilih bagi rumah teres dan kondominium/pangsapuri dalam wilayah ini.

Price

The residential property price in 2023 showed mixed movements across the board. Double storey terraced houses in established schemes such as Elmina East, USJ 5 and USJ 2 in District of Petaling, Selangor enjoyed an increase of 9.7%, 9.6% and 8.3% respectively which transacted between RM0.70 million and RM1.18 million. The same type of property in Kuala Lumpur increased by double digit in capital were recorded in Taman Bukit Maluri (12.2%), Taman Megah Kepong (11.2%), Taman Mastiara and Bandar Menjalara (11.0%) as well as Taman Seputeh (10.7%) which transacted between RM0.80 million and RM1.90 million.

In the high-rise residential segment, strong performances were recorded. In Kuala Lumpur, condominium/apartment located in prominent areas served with efficient road linkages indicating an increase including Pelangi Indah Condo (14.0%), Pavilion Hiltop Mont Kiara (13.6%), Park Seven (13.4%) and Suasana Bangsar Condominium (9.7%).

Meanwhile, condominium/ apartment a few schemes in Selangor witnessed an increase between 7.0% and 7.8%. However, there were some declines recorded in selected schemes for terraced houses and condominium/apartment in the region.

Indeks Harga Rumah

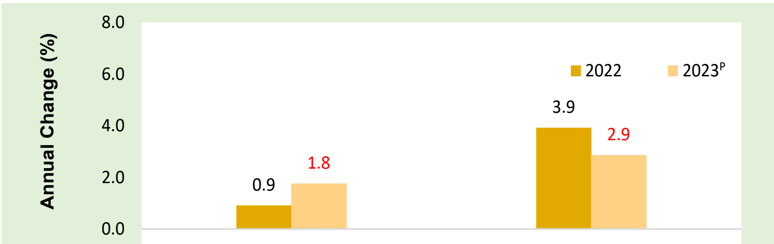
Indeks Harga Rumah bagi Kuala Lumpur dan Selangor masing-masing berada pada 196.1 mata dan 220.7 mata. Harga purata semua rumah di Selangor adalah RM535,131 pada 2023P, meningkat daripada RM520,244 pada 2022, manakala Kuala Lumpur berada pada RM778,485 meningkat daripada RM764,937 pada tahun 2022.

House Price Index

All House Index for Kuala Lumpur and Selangor stood at 196.1 points and 220.7 points respectively. The average all house price for in Selangor stood at RM535,131 in 2023P, increased from RM520,244 in 2022, while Kuala Lumpur stood at RM778,485 increased from RM764,937 in 2022.

Chart 12

All House Price Index Annual Changes



YEAR		KUALA LUMPUR	SELANGOR
2022	**Index Point**	192.7	214.5
	Average House Price	RM764,937	RM520,244
2023P	**Index Point**	196.1	220.7
	Average House Price	RM778,485	RM535,131

Sewa

Pasaran sewa kediaman di Wilayah Tengah pada umumnya stabil. Kadar pulangan purata untuk rumah teres dua tingkat di Wilayah Tengah diperolehi antara 1.2% hingga 9.4%. Di Selangor, teres dua tingkat di Taman Anggun, Bukit Rahman Putra, dan Saujana Utama masing-masing meningkat 7.8%, 7.7% dan 6.9% dengan sewa mencecah RM1,500 - RM2,000 sebulan, RM1,300 - RM1,650 sebulan dan RM1,000 - RM1,500 sebulan. Sementara itu bagi kondominium/pangsapuri, kadar pulangan purata di seluruh wilayah berada dalam lingkungan 1.2% hingga 8.9%.

Rental

The residential rental market in the Central Region was generally stable. Average rental yield for double storey terraced houses in the Central Region obtained between 1.2% and 9.4%. In Selangor, double storey terraced houses in Taman Anggun, Bukit Rahman Putra, and Saujana Utama increased by 7.8%, 7.7% and 6.9%, fetching a rental of RM1,500 -RM2,000 per month, RM1,300 - RM1,650 per month and RM1,000 - RM1,500 per month. Meanwhile condominium/apartment, average rental yield for across the region was in the range of 1.2% to 8.9%.

2.2 HARTA TANAH KOMERSIAL

Transaksi

Harta tanah komersial di Wilayah Tengah merekodkan 16,412 transaksi bernilai RM19.24 bilion, meningkat sebanyak 21.9% dalam bilangan dan 0.4% dalam nilai berbanding 2022. Lebih banyak aktiviti pasaran direkodkan apabila jumlah transaksi di Putrajaya, Kuala Lumpur dan Selangor masing-masing meningkat 58.1%, 30.9% dan 16.8%.

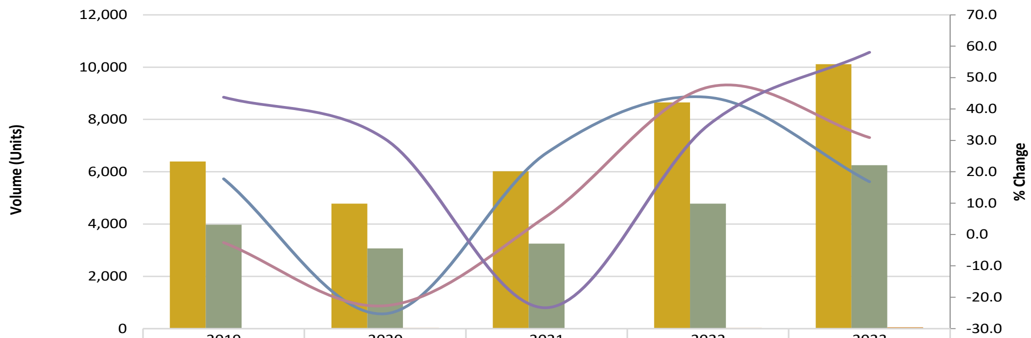
2.2 COMMERCIAL PROPERTY

Transaction

The commercial property in the Central Region recorded 16,412 transactions worth RM19.24 billion, increased by 21.9% in volume and 0.4% in value against 2022. More market activity was recorded as the transaction volume in Putrajaya, Kuala Lumpur and Selangor increased by 58.1%, 30.9% and 16.8% respectively.

Chart 13

Commercial Property Transactions Volume Trend 2019 – 2023



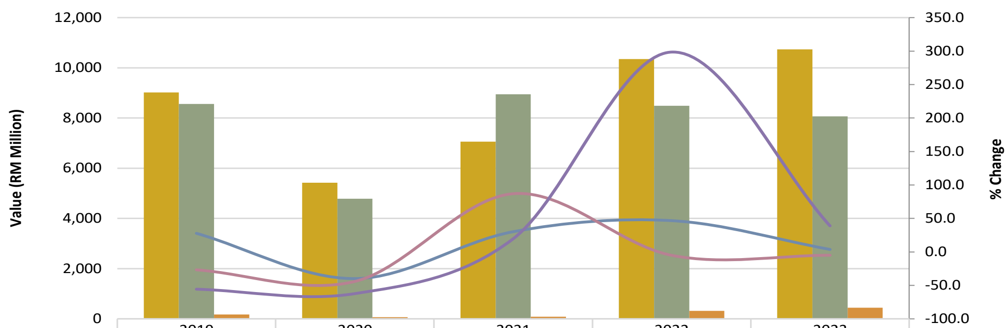
	2019	2020	2021	2022	2023
Selangor (bar)	6,394	4,779	6,021	8,654	10,110
Kuala Lumpur (bar)	3,974	3,072	3,251	4,777	6,253
Putrajaya (bar)	23	30	23	31	49
Selangor (line)	17.7	-25.3	26.0	43.7	16.8
Kuala Lumpur (line)	-2.6	-22.7	5.8	46.9	30.9
Putrajaya (line)	43.8	30.4	-23.3	34.8	58.1

Daripada segi nilai, Putrajaya dan Selangor menunjukkan peningkatan nilai masing-masing 38.9% dan 3.7% manakala Kuala Lumpur menurun 5.0% berbanding tahun 2022.

In terms of value, Putrajaya and Selangor has showed an increase of 38.9% and 3.7% respectively, while Kuala Lumpur decreased by 5.0% as compared 2022.

Chart 14

Commercial Property Transactions Value Trend 2019 – 2023



	2019	2020	2021	2022	2023
Selangor (bar)	9,014.26	5,419.69	7,055.61	10,349.13	10,731.53
Kuala Lumpur (bar)	8,561.98	4,785.20	8,945.06	8,487.79	8,064.76
Putrajaya (bar)	178.01	67.07	80.25	319.80	444.33
Selangor (line)	27.7	-39.9	30.2	46.7	3.7
Kuala Lumpur (line)	-26.8	-44.1	86.9	-5.1	-5.0
Putrajaya (line)	-55.7	-62.3	19.7	298.5	38.9

a. Kedai

Transaksi

Subsektor kedai merekodkan 3,872 transaksi bernilai RM6.15 bilion pada 2023, mencakupi 23.6% dalam bilangan dan 32.0% dalam nilai transaksi harta tanah komersial dalam wilayah ini.

Selangor terus memacu subsektor kedai dengan 3,121 transaksi bernilai RM4.34 bilion, masing-masing menyumbang 80.6% dan 70.5% daripada bilangan dan nilai transaksi kedai. Kuala Lumpur menguasai 19.0% syer bilangan transaksi dan 28.9% nilai transaksi kedai, diikuti Putrajaya menyumbang sedikit syer 0.4% dan dan 0.6% bagi nilai transaksi kedai

Status Pasaran

Keadaan unit kedai siap dibina tidak terjual bertambah baik di Wilayah Tengah apabila bilangan menurun di kesemua negeri. Kuala Lumpur merekodkan 23 unit, menurun 72.0% (2022: 82 unit), Putrajaya (9 unit) menurun 47.1% (2022: 17 unit) dan Selangor (374 unit) menurun 7.4% (2022: 404 unit). Dari segi nilai, Kuala Lumpur, Putrajaya dan Selangor masing-masing menurun 83.9% (2022: RM50.02 juta), 43.4% (2022: RM60.65 juta) dan 7.9% (2022: RM476.68 juta).

Unit dalam pembinaan belum terjual juga menurun seiring. Selangor berkurang 9.6% berbanding 2022 (510 unit), manakala Kuala Lumpur dan Putrajaya tidak dibebani dengan mana-mana unit dalam pembinaan belum terjual dan belum dibina belum terjual. Sebaliknya, Selangor merekodkan 16 unit belum dibina belum terjual pada tahun 2023.

a. Shop

Transaction

Shop sub-sector recorded 3,872 transactions worth RM6.15 billion in 2023, accounting for 23.6% in volume and 32.0% in value of commercial property transactions in the region.

Selangor continued to drive the sub-sector with 3,121 transaction worth RM4.34 billion, accounting for 80.6% and 70.5% respectively of the shop transactions volume and value. Kuala Lumpur took up 19.0% market share in transactions volume and 28.9% in transactions value, followed by Putrajaya contribute a slight share of 0.4% and 0.6% in transactions volume and value.

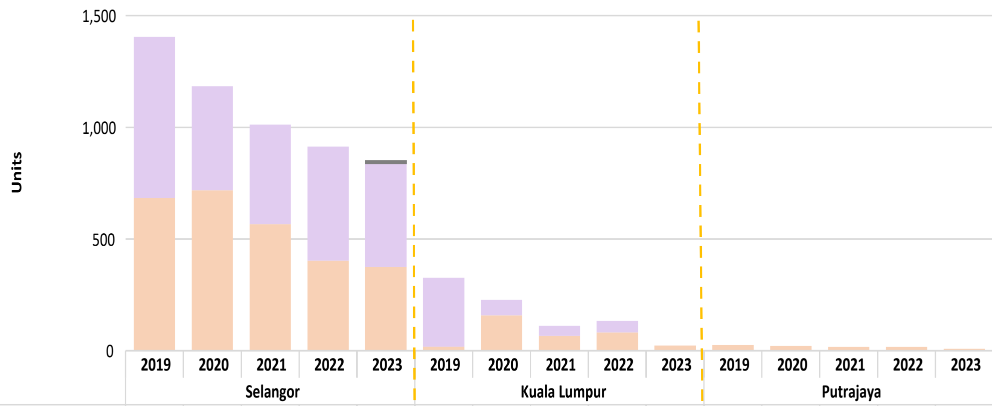
Market Status

The shop overhang situation in Central Region improved as the numbers declined in all states. Kuala Lumpur recorded 23 units, decreased by 72.0% (2022: 82 units), Putrajaya (9 units) decreased by 47.1% (2022: 17 units) and Selangor (374 units) decreased by 7.4% (2022: 404 units). In terms of value, Kuala Lumpur, Putrajaya and Selangor decreased by 83.9% (2022: RM50.02 million), 43.4% (2022: RM60.65 million) and 7.9% (2022: RM476.68 million) respectively.

Unsold under construction units also declined in tandem. Selangor decreased by 9.6% compared to 2022 (510 units), while Kuala Lumpur and Putrajaya unencumbered with any unsold under construction and unsold not constructed. On the other hand, Selangor recorded 16 unsold not constructed units in 2023.

Chart 15

Shop Overhang and Unsold Units 2019 – 2023



	Selangor					Kuala Lumpur					Putrajaya				
	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023
Unsold Not Constructed	0	0	0	0	16	0	0	0	0	0	0	0	0	0	0
Unsold Under Construction	721	466	446	510	461	309	70	45	51	0	0	0	0	0	0
Overhang	684	718	566	404	374	18	158	66	82	23	25	21	17	17	9

Aktiviti Pembinaan

Secara amnya, aktiviti pembinaan di Wilayah Tengah mengalami peningkatan berbanding tahun sebelumnya. Unit siap dibina di Selangor (301 unit) menurun 48.8% (2022: 588 unit) sementara itu, Kuala Lumpur dan Putrajaya kekal tiada pada 2023.

Mula dibina di Selangor merekodkan 932 unit diikuti Kuala Lumpur 35 unit dan Putrajaya kekal tiada pada 2023.

Sebaliknya, penawaran baharu dirancang di Selangor menunjukkan peningkatan melebihi dua kali ganda kepada 988 unit berbanding dengan 2022 (490 unit). Sebaliknya, Kuala Lumpur merekodkan penurunan dalam penawaran baharu dirancang sebanyak 95.7% (11 unit), manakala Putrajaya kekal tiada pada 2023.

Construction Activity

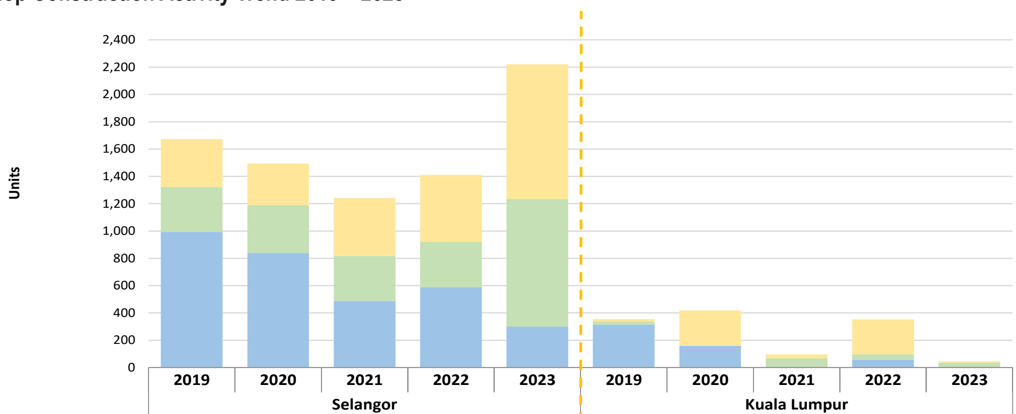
Generally, construction activities in Central Region took an upward trend against the preceding year (2022). Completion in Selangor (301 units) decreased by 48.8% (2022: 588 units) while Kuala Lumpur and Putrajaya remained nil in 2023.

Starts in Selangor recorded 932 units followed by Kuala Lumpur 35 units and Putrajaya remained nil in 2023.

On the other hand, new planned supply in Selangor showed an increase of more than double to 988 units compared to 2022 (490 units). Contrarily, Kuala Lumpur recorded a decrease in new planned supply of 95.7% (11 units), while Putrajaya remained nil in 2023.

Chart 16

Shop Construction Activity Trend 2019 – 2023



	Selangor					Kuala Lumpur				
	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023
New Planned Supply	350	305	425	490	988	18	260	29	254	11
Starts	330	350	330	333	932	24	0	68	41	35
Completion	993	839	487	588	301	313	158	0	57	0

Table 3

Construction Activity of Shop in Central Region 2023

Stage of Development / State	Selangor	Kuala Lumpur	Putrajaya
Existing Supply (units)	113,923	32,613	538
Incoming Supply (units)	6,178	1,107	0
Planned Supply (units)	3,341	1,609	0

Harga

Harga kedai menunjukkan pergerakan bercampur-campur dengan kenaikan dan penurunan dicatatkan di beberapa kawasan. Harga kedai dua tingkat di Lucky Garden (Jalan Bangsar) merekodkan peringkatan 13.1%, dipindahmilik antara RM4.95 juta hingga RM5 juta. Manakala kedai tiga tingkat di Kuala Lumpur merekodkan penurunan antara 2.2% hingga 9.5%.

Di Selangor, Daerah Petaling menyaksikan kenaikan harga bagi kedai dua tingkat di beberapa skim iaitu Seksyen 28 Shah Alam, Bandar Puchong Utama, Taman Putra Permai dan SS 2 Petaling Jaya masing-masing sebanyak 11.5%, 9.3%, 7.4% dan 5.7% dengan lingkungan harga RM1.21 juta hingga setinggi RM2.43 juta. Begitu juga, kedai tiga tingkat di Prima Sri Gombak mencatatkan kenaikan 9.7%, yang dipindahmilik antara RM2.85 juta hingga RM3.60 juta.

Sewa

Sewa tingkat bawah kedai umumnya stabil dengan beberapa kenaikan di kawasan komersial terpilih. Di kawasan pusat bandar Kuala Lumpur, sewa tertinggi direkodkan di Jalan Tuanku Abdul Rahman dan diikuti kawasan Changkat Bukit Bintang dengan kadar sewa sebulan masing-masing RM17,000 hingga RM34,000 sebulan dan RM22,000 hingga RM30,200 sebulan. Di Selangor, sewa tingkat bawah kedai di Daerah Petaling direkodkan antara RM2,300 hingga RM8,000 sebulan, manakala sewa di Taman Melawati meningkat 8.8% dengan kadar sewa RM4,800 hingga RM7,500 sebulan.

b. Pangsapuri Khidmat/ SOHO

Transaksi

Pangsapuri khidmat/ SOHO di Wilayah Tengah merekodkan 8,221 transaksi bernilai RM5.70 bilion, membentuk 50.1% daripada jumlah transaksi dan 29.6% daripada jumlah nilai harta tanah komersial dalam wilayah ini.

Prestasi pasaran wilayah merekodkan peningkatan 41.4% dalam bilangan (2022: 5,812 transaksi) dan 43.5% dalam nilai (2022: RM3,970.84 juta). Selangor menyumbang bilangan tertinggi kepada jumlah keseluruhan wilayah dengan 49.2% (4,043 transaksi) syer pasaran.

Price

Prices of shops showed mixed movement with increases and decreases charted in several areas. In Kuala Lumpur, three storey shops in Lucky Garden (Jalan Bangsar) recorded an increase of 13.1%, transacted between RM4.95 million and RM5 million. While three-storey shops in Kuala Lumpur recorded a decrease between 2.2% and 9.5%.

In Selangor, Petaling District witnessed a price increase for two storey shops in several scheme namely Seksyen 28 Shah Alam, Bandar Puchong Utama, Taman Putra Permai and SS 2 Petaling Jaya by 11.5%, 9.3%, 7.4% and 5.7% respectively with price range from RM1.21 million to as high as RM2.43 million. Similarly, three storey shops in Prima Sri Gombak recorded an increase of 9.7%, which transacted between RM2.85 and RM3.60 million.

Rental

Rental of ground floor shops were generally stable with several increases in selected commercial areas. In central town area of Kuala Lumpur, highest rental was recorded in Jalan Tuanku Abdul Rahman followed by the Changkat Bukit Bintang area with a monthly rental rate of RM17,000 to RM34,000 per month and RM22,000 to RM30,200 per month respectively. In Selangor, rental of ground floors shop in District of Petaling recorded ranging from RM2,300 to RM8,000 per month, while in Taman Melawati increased by 8.8% with rental rate at RM4,800 to RM7,500 per month.

b. Serviced Apartment/ SOHO

Transaction

Serviced apartment/ SOHO in the Central Region recorded 8,221 transactions worth RM5.70 billion, formed 50.1% in volume and 29.6% in value of commercial property transactions in the region.

Region's market performance recorded an increase of 41.4% in volume (2022: 5,812 transactions) and 43.5% in value (2022: RM3,970.84 million). Selangor contributed higher market volume to the region total with 49.2% (4,043 transactions) market share.

Status Pasaran

Keadaan unit pangsapuri khidmat/ SOHO siap dibina tidak terjual, dalam pembinaan belum terjual dan unit belum dibina belum terjual bertambah baik di Wilayah Tengah. Selangor dan Kuala Lumpur merekodkan siap dibina tidak terjual yang lebih rendah masing-masing pada 35.6% (2,494 unit) dan 18.9% (5,515 unit). Sebaliknya, Putrajaya merekodkan 84 unit siap dibina tidak terjual pada tahun 2023.

Begitu juga, unit dalam pembinaan belum terjual dan belum dibina belum terjual di Wilayah Tengah juga menurun masing-masing 30.9% kepada 19,507 unit (2022: 28,218 unit) dan 34.1% kepada 5,803 unit (2022: 8,801 unit).

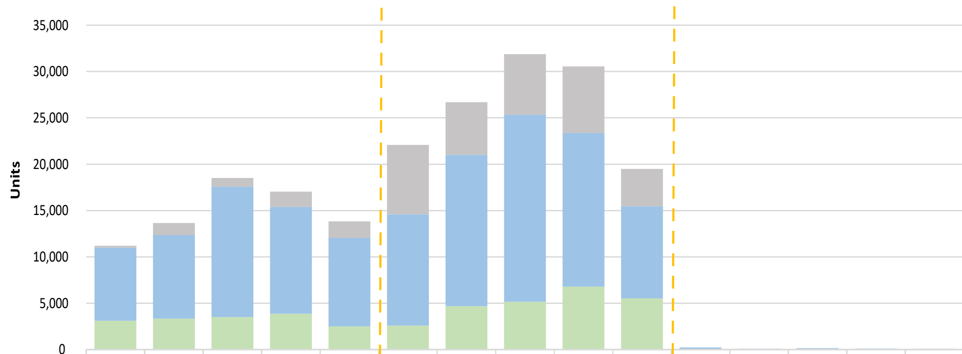
Market Status

The serviced apartment/ SOHO overhang, unsold under construction and unsold not constructed situation improved in Central Region. Selangor and Kuala Lumpur recorded lower overhang at 35.6% (2,494 units) and 18.9% (5,515 units) respectively. Contrarily, Putrajaya recorded 84 overhang units in 2023.

Similarly, unsold under construction and unsold not constructed in Central Region also decreased by 30.9% to 19,507 units (2022: 28,218 units) and 34.1% to 5,803 units (2022: 8,801 units) respectively.

Chart 17

Serviced Apartment/ SOHO Overhang and Unsold Units 2019 – 2023



	Selangor 2019	2020	2021	2022	2023	Kuala Lumpur 2019	2020	2021	2022	2023	Putrajaya 2019	2020	2021	2022	2023
Unsold Not Constructed	202	1,299	935	1,637	1,799	7,457	5,700	6,522	7,164	4,004	0	0	0	0	0
Unsold Under Construction	7,867	9,015	14,099	11,523	9,546	12,035	16,324	20,193	16,585	9,961	201	92	163	110	0
Overhang	3,118	3,348	3,489	3,870	2,494	2,578	4,677	5,152	6,800	5,515	34	0	0	0	84

Aktiviti Pembinaan

Secara umumnya, aktiviti pembinaan di Wilayah Tengah kekal rendah berbanding 2022. Dalam tempoh kajian menyaksikan unit siap dibina menurun 13.5% (23,417 unit) berbanding 2022 (27,078 unit). Kuala Lumpur mendahului dengan 14,295 unit, diikuti Selangor (8,664 unit) dan Putrajaya (458 unit)

Selangor merekodkan peningkatan ketara dalam mula dibina dan penawaran baharu dirancang sebanyak 36.7% dan 60.9%. Manakala Kuala Lumpur mencatatkan penurunan masing-masing sebanyak 7.6% dan 20.0%. Tiada unit mula dibina dan penawaran baharu dirancang direkodkan di Putrajaya dalam tempoh kajian.

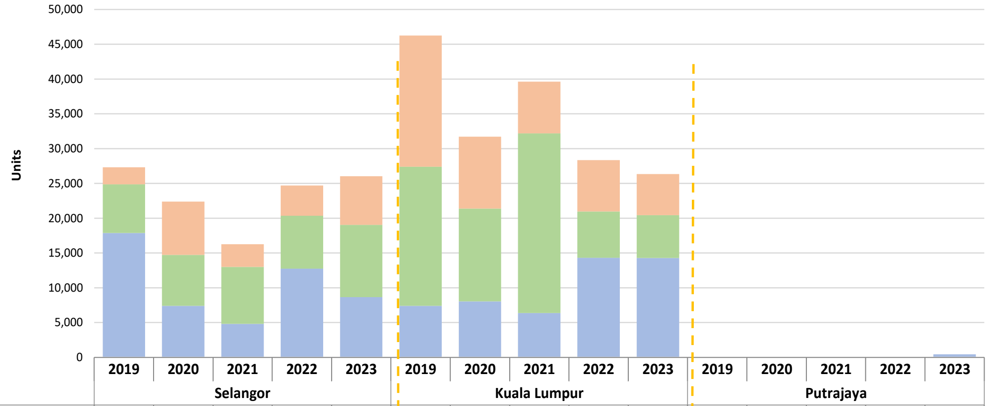
Construction Activity

Generally, construction activities in Central Region remained on a low tone compared to 2022. The review period witnessed completion units decreased by 13.5% to 23,417 units as compared to 2022 (27,078 units). Kuala Lumpur lead with 14,295 units, followed by Selangor (8,664 units) and Putrajaya (458 units).

Selangor recorded significant increases in starts and new planned supply by 36.7% and 60.9%. While Kuala Lumpur recorded the reverse, declined by 7.6% and 20.0% respectively. There were no start and new planned supply recorded in Putrajaya during the review period.

Chart 18

Serviced Apartment / SOHO Construction Activity Trend 2019 – 2023



	Selangor					Kuala Lumpur					Putrajaya				
	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023
New Planned Supply	2,448	7,637	3,281	4,348	6,994	18,853	10,351	7,439	7,387	5,912	0	0	0	0	0
Starts	6,969	7,334	8,167	7,590	10,375	19,996	13,340	25,808	6,641	6,137	0	0	0	0	0
Completion	17,893	7,410	4,830	12,761	8,664	7,399	8,043	6,388	14,317	14,295	0	0	0	0	458

Table 4

Construction Activity of Serviced Apartment/ SOHO in Central Region 2023

Stage of Development / State	Selangor	Kuala Lumpur	Putrajaya
Existing Supply (units)	155,029	125,082	1,204
Incoming Supply (units)	76,438	60,059	323
Planned Supply (units)	25,898	54,761	940

Harga

Harga pangsapuri khidmat dan SOHO di Wilayah Tengah menyaksikan pergerakan bercampur-campur secara keseluruhan. Pangsapuri khidmat seperti Amaya Maluri, Parklane OUG Service Apartment dan Pinnacle Sri Petaling di Kuala Lumpur masing-masing meningkat 11.9%, 10.9% dan 9.5%.

Begitu juga di Selangor, jenis harta tanah yang sama di Greenfield Residence (PJS 8), PJ Midtown dan Residensi Setia Impian di Selangor masing-masing meningkat 9.5%, 8.0% dan 7.7%.

Sewa

Pasaran sewa pangsapuri khidmat pada umumnya stabil. Kenaikan sewa dilihat di Dataran Emerald @ Emerald Avenue di Gombak (9.3% hingga 9.7%), Urban 360 di Gombak (9.3%), Residensi Xtreme Meridian (9.1%), Impiria Residensi di Klang (8.3%), Arcoris Mont Kiara di Kuala Lumpur (9.3%) dan Solaris Dutamas (7.1%); masing-masing dengan sewa bulanan mencecah antara RM1,100 - RM2,000, RM1,400 - RM2,000, RM2,200 - RM2,700, RM1,500 - RM2,800,

Price

Prices of serviced apartments and SOHO in Central Region saw mixed movement across the board. In Kuala Lumpur, serviced apartments namely Amaya Maluri, Parklane OUG Service Apartment and Pinnacle Sri Petaling increased by 11.9%, 10.9% and 9.5% respectively.

Similarly, in Selangor, similar property type in Greenfield Residence (PJS 8), PJ Midtown and Residensi Setia Impian also witnessed a marginal increase by 9.5%, 8.0% and 7.7% respectively.

Rental

The serviced apartment's rental market was generally stable. Increment in rental saw at Dataran Emerald @ Emerald Avenue in Gombak (9.3% to 9.7%), Urban 360 in Gombak (9.3%), Residensi Xtreme Meridian (9.1%), Impiria Residensi in Klang (8.3%), Arcoris Mont Kiara in Kuala Lumpur (9.3%) and Solaris Dutamas (7.1%), fetching monthly rental of RM1,100 - RM2,000, RM1,400 - RM2,000, RM2,200 - RM2,700, RM1,500 - RM2,800, RM3,200 - RM4,600 and RM2,800 - RM4,000

RM3,200 - RM4,600 dan RM2,800 - RM4,000 sebulan. Sementara itu unit SOHO Marc Residences, di Kuala Lumpur mencatatkan kadar sewa tertinggi RM4,000-RM4,200 sebulan.

c. Kompleks Perniagaan

Transaksi

Dalam tempoh kajian, lapan transaksi direkodkan di Selangor iaitu Giant Kemuning Utama, Giant Putra Permai, Giant Setapak, Giant Seksyen 18 Shah Alam, Econsave Puncak Alam, Econsave Batang Kali, Tropicana City Mall dan Kippmall Kota Warisan. Semua perjanjian jualbeli ini ditandatangan dan disempurnakan dalam tempoh kajian kecuali Giant Seksyen 18 Shah Alam ditandatangan pada 2021, tetapi disempurnakan dalam tahun 2023.

Penghunian dan Ketersediaan Ruang

Prestasi subsektor ruang niaga di Wilayah Tengah kekal stabil dengan kadar penghunian keseluruhan yang lebih tinggi dalam tempoh kajian. Kuala Lumpur dan Selangor mencatatkan kadar penghunian yang lebih tinggi masing-masing pada 83.8% dan 79.7% berbanding 2022 (Kuala Lumpur: 82.7%, Selangor: 77.5%). Putrajaya mencatatkan kadar penghunian yang lebih rendah pada 79.2% berbanding 2022 (82.4%).

per month, respectively. Meanwhile SOHO units Marc Residences, in Kuala Lumpur recorded highest rental rate at RM4,000-RM4,200 per month.

c. Shopping Complex

Transaction

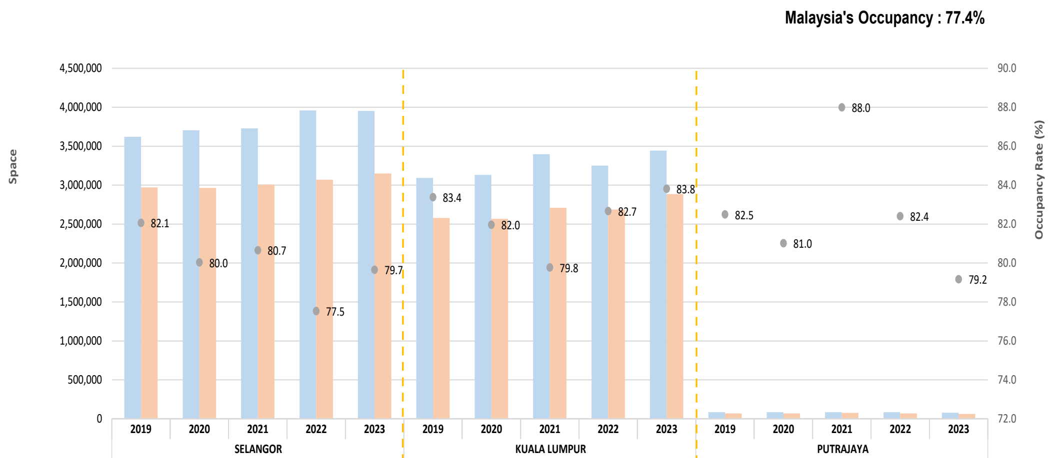
The review period recorded eight transactions in Selangor namely Giant Kemuning Utama, Giant Putra Permai, Giant Setapak, Giant Seksyen 18 Shah Alam, Econsave Puncak Alam, Econsave Batang Kali, Tropicana City Mall and Kip Mall Kota Warisan. All these sale and purchase agreements were signed and concluded in the review period except Giant Seksyen 18 Shah Alam were signed in 2021 but concluded in 2023.

Occupancy and Space Availability

The performance of retail sub-sector in the Central Region remained stable with higher overall occupancy rate in the review period. Kuala Lumpur and Selangor recorded higher occupancy rate at 83.8% and 79.7% respectively compared to 2022 ((Kuala Lumpur: 82.7%, Selangor: 77.5%). Putrajaya recorded lower occupancy rate at 79.2% compared to 2022 (82.4%).

Chart 19

Supply and Occupancy of Shopping Complex 2019 – 2023



	SELANGOR 2019	2020	2021	2022	2023	KUALA LUMPUR 2019	2020	2021	2022	2023	PUTRAJAYA 2019	2020	2021	2022	2023
Space (s.m.)	3,620,521	3,704,593	3,729,665	3,959,058	3,953,291	3,093,317	3,131,431	3,397,193	3,250,139	3,443,345	86,017	86,017	86,017	86,017	79,744
Space Occupied (s.m.)	2,971,139	2,964,756	3,008,199	3,069,598	3,148,989	2,579,070	2,566,619	2,709,996	2,686,727	2,885,989	70,958	69,688	75,684	70,884	63,131
Occupancy Rate (%)	82.1	80.0	80.7	77.5	79.7	83.4	82.0	79.8	82.7	83.8	82.5	81.0	88.0	82.4	79.2

Table 5

Pertinent Movements in Shopping Complex

No.	Shopping Complex	Estimated Space (s.m.)	Tenant
1.	NU Sentral	12,889	Move Out
2.	IOI Mall Puchong	15,941	Move In
3.	Sancturay Mall	1,378	Move In
4.	SACC Mall	1,492	Move In
		6,554	Move Out
5.	Central I-City	8,268	Move In
6.	Aeon Mall Shah Alam	14,407	Move In
		2,468	Move Out
7	Plaza Alam Sentral	1,282	Move Out
8	Komplek PKNS	14,081	Move Out
9	Komplek Ole-Ole	1,218	Move Out

Aktiviti Pembinaan

Tiga bangunan baru siap dibina direkodkan dalam tempoh kajian. Kuala Lumpur merekodkan The Exchange TRX Mall, Pavilion Damansara Heights (Fasa 1) dan Chow Kit Trade Centre siap dibina dan menawarkan ruang niaga ke pasaran. Perincian seperti di bawah:

Construction Activity

Three new completion was recorded in the review period. Kuala Lumpur recorded the completion of The Exchange TRX Mall, Pavilion Damansara Heights (Phase 1) and Chow Kit Trade Centre offering retail space into the market. The details are as below:

Table 6

Completion of Shopping Complex in Central Region 2023

State	Name of Building	Location	Property Type	Net Lettable Area (sq. metre)
WP WPKL	Chow Kit Trade Centre	Jalan Abdul Rahman Idris	Arked	3,219
WP WPKL	Pavilion Damansara Heights (Fasa 1)	Jalan Damansara	Shopping Centre	52,903
WP WPKL	The Exchange TRX Mall	Persiaran TRX	Shopping Centre	125,415

Table 7

Construction Activity of Shopping Complex in Central Region 2023

State / Stage of Development	Selangor	Kuala Lumpur	Putrajaya
Existing Supply	155 complexes (3,953,291 s.m)	113 complexes (3,443,345 s.m)	3 complexes (79,744 s.m)
Incoming Supply	5 complexes (331,202 s.m)	7 complexes (253,781 s.m)	2 complexes (29,277 s.m)
Planned Supply	0	3 complexes (196,691 s.m)	0

Sewa

Secara umumnya, sewa ruang niaga adalah stabil bagi kebanyakan kompleks perniagaan. Suria KLCC di Kuala Lumpur mengekalkan keunggulannya, dengan julat sewa tertinggi dari RM377 s.m.p hingga RM2,227 s.m.p sebulan. Di Kawasan Utama Pusat Bandar, pertumbuhan

Rental

Generally, rental of retail space was stable for most shopping complexes. Suria KLCC in Kuala Lumpur sustained its prominence, fetching the highest rental range from RM377 p.s.m to as high as RM2,227 p.s.m. per month. In Central Town Prime Area, positive rental sewa yang positif direkodkan di Suria KLCC, Kompleks Wilayah, Plaza Low Yat dan Avenue K.

Sementara itu, di Selangor menyaksikan pertumbuhan sewa yang positif antaranya di Starling Mall, Klang Parade dan Shaw Centrepoint Complex kerana penyewaan baru dan pembaharuan sewa.

d. Pejabat Binaan Khas

Transaksi

Dalam tempoh kajian, 13 transaksi direkodkan di Wilayah Tengah iaitu Menara HSBC, Blok B Plaza Damansara, Menara AA, Plaza VADS dan The Weld di Kuala Lumpur serta Menara Tulus di Putrajaya. Sementara itu di Selangor, Cyberview Garden Villa, Data Centre NTT MSC (CBJ 5), Emerio Building (Cyberjaya), Blok A (Wisma Speedy), Blok C (Lot 6875), Blok A dan B (Lot 15686) dan Qi Tower telah dipindahmilik. Perjanjian jualbeli kebanyakannya ditandatangani dan disempurnakan pada 2023 kecuali beberapa bangunan telah ditandatangan pada tahun sebelumnya tetapi disempurnakan dalam tempoh kajian.

Penghunian dan Ketersediaan Ruang

Prestasi pejabat binaan khas di Wilayah Tengah kekal stabil. Putrajaya dan Selangor tetap teguh dengan kadar penghunian meningkat sedikit, masing-masing kepada 92.0% dan 72.6% berbanding 2022 (Putrajaya: 91.5% dan Selangor: 68.9%). Walau bagaimanapun, Kuala Lumpur mencatatkan kadar penghunian lebih rendah pada 72.1% berbanding 2022 (73.7%).

growth was recorded at Suria KLCC, Kompleks Wilayah, Plaza Low Yat and Avenue K.

Meanwhile, Selangor witnessed positive rental growth in Starling Mall, Klang Parade and Shaw Centrepoint Complex due to new tenancy and rental renewals.

d. Purpose-built Office

Transaction

The review period recorded 13 transactions in Central Region namely Menara HSBC, Blok B Plaza Damansara, Menara AA, Plaza VADS and The Weld in Kuala Lumpur as well as Menara Tulus in Putrajaya. Meanwhile in Selangor Cyberview Garden Villa, Data Centre NTT MSC (CBJ 5), Emerio Building (Cyberjaya), Blok A (Wisma Speedy), Blok C (Lot 6875), Blok A and B (Lot 15686) and Qi Tower were transacted. The sale and purchase agreement mostly signed and concluded in 2023 except a few buildings were signed in previous years but concluded in the review period.

Occupancy and Space Availability

The performance of purpose-built office in the Central Region remained stable. Putrajaya and Selangor remained firm as the occupancy rate slightly increased to 92.0% and 72.6% respectively compared to 2022 (Putrajaya: 91.5% and Selangor: 68.9%). However, Kuala Lumpur recorded lower occupancy rate at 72.1% compared to 2022 (73.7%).

Chart 20

Supply and Occupancy of Purpose-built Office 2019 – 2023

	SELANGOR					KUALA LUMPUR					PUTRAJAYA				
	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023	2019	2020	2021	2022	2023
Space (s.m.)	4,020,955	4,177,519	4,282,121	4,547,884	4,659,431	9,146,277	9,275,474	9,817,650	9,813,927	10,236,990	2,274,574	2,525,253	2,540,853	2,540,853	2,540,853
Space Occupied (s.m.)	2,881,302	2,890,317	2,945,335	3,134,983	3,383,345	7,161,566	7,193,446	7,199,049	7,237,348	7,382,703	2,024,023	2,275,114	2,301,282	2,325,662	2,337,762
Occupancy Rate (%)	71.7	69.2	68.8	68.9	72.6	78.3	77.6	73.3	73.7	72.1	89.0	90.1	90.6	91.5	92.0

Table 8

Pertinent Movements in Purpose-built Office 2023

No.	Purpose-built Office	Estimated Space (s.m.)	Tenant Movement
1	Menara 1 Sentrum	3,031	Move In
2	Wisma Bumi Raya	13,315	Move Out
3	Menara Citibank	10,865	Move In
4	The Intermark (Integra Tower)	2,354	Move In
5	The Intermark (Integra Tower)	2,207	Move Out
6	Mercu 3	1,279	Move In
7	Menara Manulife	1,907	Move In
8	Etiqa Twins	1,337	Move Out
9	South Centrepoint Midvalley	1,154	Move In
10	Menara AA	1,301	Move Out
11	Sunway Putra Tower	2,165	Move Out
12	Menara Yayasan Selangor	4,677	Move In
		2,162	Move out
13	Quill 9	1,418	Move out
14	Mines 2	3,825	Move In
15	CP Tower	2,063	Move Out

Aktiviti Pembinaan

Enam bangunan baru siap dibina direkodkan dalam tempoh kajian di Wilayah Tengah dan semuanya di Kuala Lumpur. Perincian seperti di bawah:

Construction Activity

Six new completion was recorded in the review period in Central Region and all in Kuala Lumpur. The details are as below:

Table 9

Completion of Purpose-built Office in Central Region 2023

State	Name of Building	Location	Property Type	Net Lettable Area (sq. metre)
WP WPKL	Corporate Tower @ Sunway Velocity 2	Jalan Peel/ Jalan Cheras	Private Building	29,185
WP WPKL	The Met Corporate Towers	Jalan Dutamas 2	Private Building	58,372
WP WPKL	Aspire Tower @ KL Eco City	Jalan Hj Abdullah Hukum	Private Building	38,850
WP WPKL	KL 118 (Menara Warisan Merdeka)	Jalan Pudu	Private Building	150,962
WP WPKL	Ibu Pejabat Majlis Agama Islam Wilayah Persekutuan (MAIWP)	Jalan Raja Muda Abd Aziz	Government Building	18,957
WP WPKL	Pavilion Damansara Heights Corporate Towers	Jalan Damansara	Private Building	43,478

Table 10

Construction Activity of Purpose-built Office in Central Region 2023

Stage of Development / State	Selangor	Kuala Lumpur	Putrajaya
Existing Supply	276 buildings (4,659,431 s.m.)	465 buildings (10,236,990 s.m.)	47 buildings (2,540,853 s.m.)
Incoming Supply	3 buildings (60,243 s.m.)	12 buildings (716,580 s.m.)	3 buildings (59,940 s.m.)
Planned Supply	0	19 buildings (761,621 s.m.)	3 buildings (39,875 s.m.)

Sewa

Secara amnya, sewa ruang pejabat stabil bagi kebanyakan bangunan pejabat. Di kawasan segitiga emas, Plaza OSK (Jalan Ampang), Menara Maxis dan Wisma Genting mencatat pertumbuhan sewa masing-masing pada 6.6%, 5.8% dan 5.2% dengan kadar sewa masing-masing daripada RM57.48 s.m.p hingga RM76.96 s.m.p, RM91.60 s.m.p hingga RM138.96 s.m.p dan RM131.32 s.m.p.

Di Selangor, kebanyakan kadar sewa ruang pejabat tetap stabil dengan pertumbuhan sewa yang positif di Damansara Uptown, Menara Mustapha Kamal (PJ Trade Tower A), Mercu Maybank, Wisma Consplant, Kompleks MAIS Klang dan NTS Klang. Kadar sewa ruang pejabat tertinggi direkodkan di Damansara Uptown dengan kadar sewa daripada RM40.90 s.m.p hingga RM138.89 s.m.p.

e. Harta Tanah Riadah

Dalam tempoh kajian, satu transaksi direkodkan iaitu Stripes Hotel di Jalan Kamunting, Chow Kit, Kuala Lumpur.

Aktiviti pembinaan baharu di Wilayah Tengah menyaksikan empat hotel siap dibina dalam tempoh kajian. Mercure Hotel dan Imperial Lexis di Kuala Lumpur masing-masing menawarkan 235 bilik dan 439 bilik. Sementara itu, Avia Plus dan Holiday Inn Sepang di Selangor masing-masing menawarkan 111 bilik dan 253 bilik.

Sehingga 2023, terdapat 468 hotel (73,911 bilik) penawaran sedia ada dengan 17 lagi hotel (4,160 bilik) dalam penawaran akan datang dan lapan hotel (1,453 bilik) dalam penawaran yang dirancang.

2.3 HARTA TANAH INDUSTRI

Transaksi

Subsektor industri menyumbang 2.9% daripada keseluruhan aktiviti pasaran di Wilayah Tengah. Prestasi pasaran wilayah ini merekodkan penurunan dalam bilangan 4.5% kepada 2,750 transaksi (2022: 2,881 transaksi) dan nilai meningkat 15.0% kepada RM12.24 billion (2022: RM10.65 bilion).

Rental

Generally, rentals of office space were stable for most office buildings. In the golden triangle area, Plaza OSK (Jalan Ampang), Menara Maxis and Wisma Genting recorded rental growth at 6.6%, 5.8% and 5.2% respectively with rental from RM57.48 p.s.m. to RM76.96 p.s.m, RM91.60 p.s.m. to RM138.96 p.s.m. and RM131.32 p.s.m.

In Selangor, most office space rental rates remained stable with positive rental growth in Damansara Uptown, Menara Mustapha Kamal (PJ Trade Tower A), Mercu Maybank, Wisma Consplant, Kompleks MAIS Klang and NTS Klang. The highest rental rate for office space was recorded in Damansara Uptown with rental from RM40.90 p.s.m. to RM138.89 p.s.m.

e. Leisure Property

The review period recorded the transaction of Stripes Hotel in Jalan Kamunting, Chow Kit, Kuala Lumpur.

New construction activity in the central region showed four new completions in the review period. Mercure Hotel and Imperial Lexis in Kuala Lumpur offering 235 rooms and 439 rooms respectively. Meanwhile Avia Plus and Holiday Inn Sepang in Selangor offering 111 rooms and 253 rooms respectively.

As at 2023, there were 468 hotels (73,911 rooms) in the existing supply with another 17 hotels (4,160 rooms) in the incoming supply and eight hotels (1,453 rooms) in the planned supply.

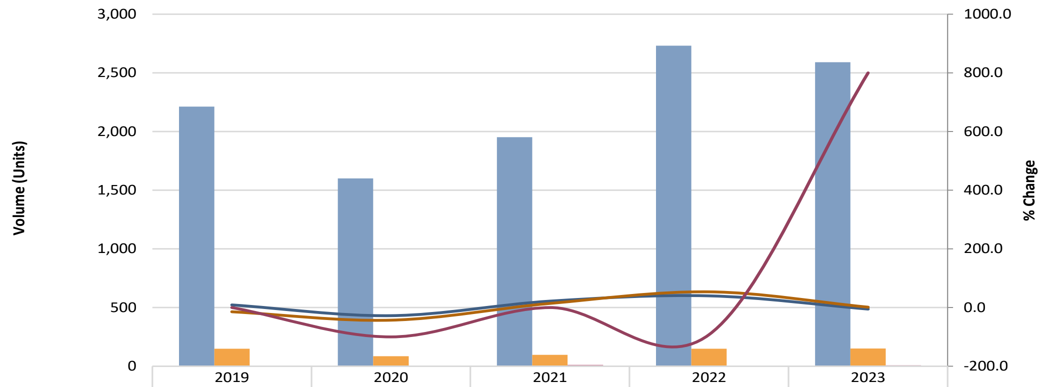
2.3 INDUSTRIAL PROPERTY

Transaction

The industrial sub-sector contributed a marginal portion of 2.9% to the overall market activity in the Central Region. The region's market performance recorded a decrease of 4.5% in volume to 2,750 transaction (2022: 2,881 transactions) and a 15.0% increase in value to RM12.24 billion (2022: RM10.65 billion).

Chart 21

Industrial Property Transactions Volume Trend 2019 – 2023



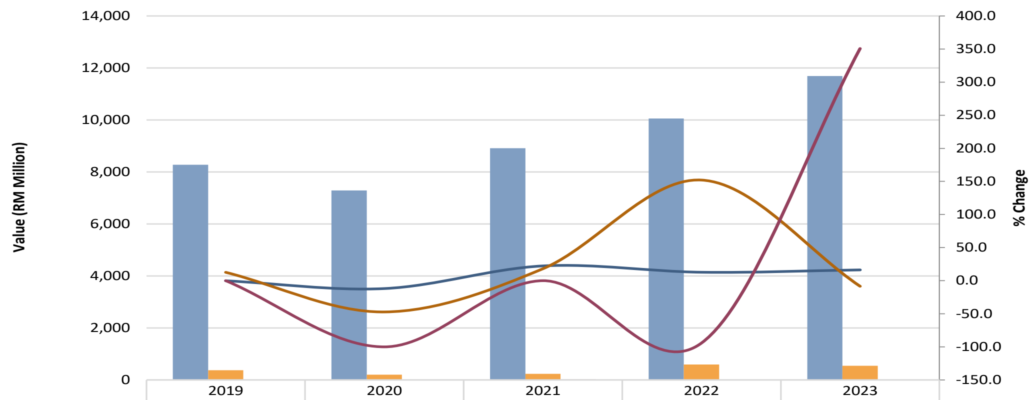
	2019	2020	2021	2022	2023
Selangor	2,212	1,601	1,952	2,731	2,590
Kuala Lumpur	149	85	97	149	151
Putrajaya	1	0	13	1	9
Selangor	9.0	-27.6	21.9	39.9	-5.2
Kuala Lumpur	-14.4	-43.0	14.1	53.6	1.3
Putrajaya	0.0	-100.0	0.0	-92.3	800.0

Daripada segi nilai transaksi, Putrajaya dan Selangor masing-masing meningkat lebih tiga kali ganda dan 16.3%, manakala Kuala Lumpur menurun 8.5%.

In terms of transaction value, Putrajaya and Selangor increase by more than three-fold and 16.3% respectively, while Kuala Lumpur decreased by 8.5%.

Chart 22

Industrial Property Transactions Value Trend 2019 – 2023



	2019	2020	2021	2022	2023
Selangor	8,276.47	7,291.00	8,917.24	10,052.82	11,690.24
Kuala Lumpur	377.62	199.21	235.16	592.70	542.60
Putrajaya	1.50	0.00	22.50	1.30	5.86
Selangor	-0.2	-11.9	22.3	12.7	16.3
Kuala Lumpur	12.6	-47.2	18.0	152.0	-8.5
Putrajaya	0.0	-100.0	0.0	-94.2	350.4

Status Pasaran

Market Status

Wilayah Tengah mengekalkan unit harta tanah siap dibina tidak terjual seperti 2022. Selangor merekodkan 45 unit, manakala Kuala Lumpur dan Putrajaya kekal sifar.

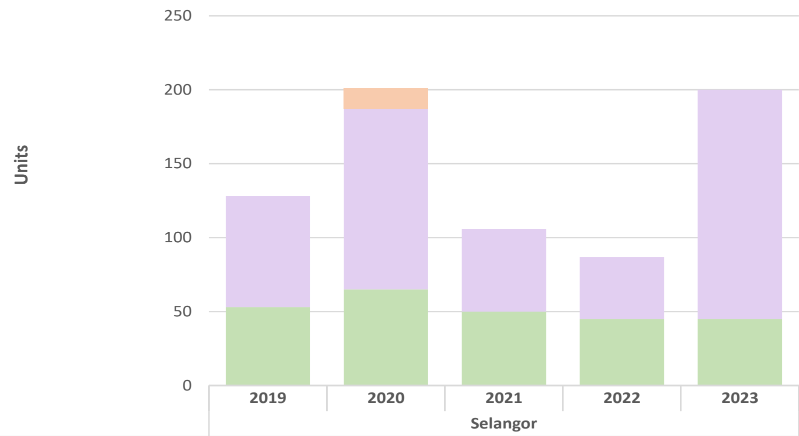
Central Region sustained overhang units as 2022. Selangor recorded 45 units, while Kuala Lumpur and Putrajaya remained as nil.

Begitu juga, unit dalam pembinaan belum terjual di Wilayah Tengah, Selangor meningkat melebihi dua kali ganda kepada 155 unit (2022: 42 unit), manakala Kuala Lumpur dan Putrajaya kekal sifar. Walaubagaimana pun tidak ada unit belum dibina belum terjual di wilayah tengah pada 2023.

Similarly, unsold under construction in Central Region, Selangor increased more than two fold to 155 units (2022: 42 units), meanwhile Kuala Lumpur and Putrajaya remained as nil. However, there is no unsold not constructed units in central region in 2023.

Chart 23

Industrial Overhang and Unsold Units 2019 – 2023



	2019	2020	2021	2022	2023
Unsold Not Constructed	0	14	0	0	0
Unsold Under Construction	75	122	56	42	155
Overhang	53	65	50	45	45

Aktiviti Pembinaan

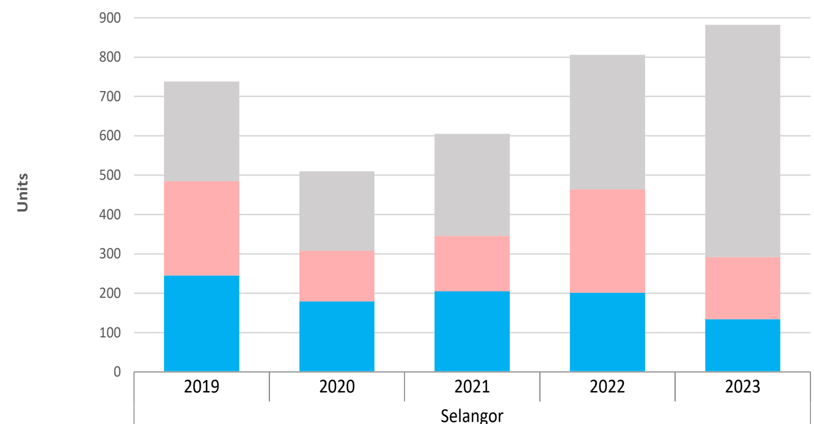
Unit siap dibina, mula dibina dan penawaran baharu dirancang di Selangor adalah sederhana. Unit siap dibina dan unit mula dibina menurun masing-masing 33.3% dan 39.9%, manakala penawaran baharu dirancang meningkat 72.5%. Tiada aktiviti pembinaan direkodkan di Kuala Lumpur dan Putrajaya.

Construction Activity

Completion, starts and new planned supply in Selangor were moderate. Completion and start decrease by 33.3% and 39.9% respectively, while new planned supply increase by 72.5%. There was no new construction activity recorded in Kuala Lumpur and Putrajaya.

Chart 24

Industrial Construction Activity Trend 2019 – 2023



	2019	2020	2021	2022	2023
New Planned Supply	253	202	259	342	590
Starts	240	129	141	263	158
Completion	245	179	205	201	134

Table 11

Construction Activity of Industrial in Central Region

Stage of Development / State	Selangor	Kuala Lumpur	Putrajaya
Existing Supply (units)	42,008	5,138	48
Incoming Supply (units)	1,518	0	0
Planned Supply (units)	2,125	37	0

3.0 PROPERTY HIGHTLIGHTS

3.1 Infrastructure Development

No.	Infrastructure Projects	Descriptions	Current Development Status
1.	Light Rail Transit (LRT3)	• Total Length - 37.0 km • Link Bandar Utama with Johan Setia in Klang • Travel Time: 60 minutes. • No. of stations: 20 • Expected to be completed by 2024.	Under Construction: 87%
2.	East Coast Rail Link (ECRL)	• This east and west coast rail network connecting Kota Bharu, Kelantan to Port Klang, Selangor. • The new ECRL alignment for Section C commences from Mentakab, Gombak, Serendah, Puncak Alam, Kapar to Port Klang. • The distance from Mentakab to Port Klang is 204 km. • The project expected to be completed by Dec 2026	Stage of completion: 56% (Overall construction) and 13.24% for Selangor
3.	Lebuhraya Pantai Barat (LPB) / West Coast Expressway (WCE)	• The West Coast Expressway or better known as the WCE built in the West Coast, Peninsular Malaysia connects two states, namely Perak and Selangor. The highway starts from Taiping, Perak and ends in Banting, Selangor. • The construction of WCE involves the Selangor State line of 93.8 kilometers, while the Perak State line of 139.2 kilometers. • The construction is divided into 11 packages, of which seven packages are in Selangor while the others are in Perak. • In Selangor, the first six packages are completed and open to traffic. While for Package 7, namely Assam Jawa Elevated Interchange to Tanjung Karang Elevated Interchange is currently under construction. It is divided into Package 7A (19.5 kilometers) and Package 7B (10.0 kilometers). • Package 7 expected to be completed by 2025..	Under Construction: Package 7A: 100% Package 7B: 20% Expected to be completed on March 2025
4.	East Klang Valley Expressway (EKVE)	• A 36-kilometer route connecting Sg Long from SILK Highway in the south and Ukay Perdana in the north. The highway comprises 4 routes (2 routes per way), 5 (five) "interchanges" and 5 (five) tolls. The construction of this highway is aimed at smoothing the flow of traffic on the MRR II route. • The project expected to be completed by 2024.	Under Construction: 91%

No.	Infrastructure Projects	Descriptions	Current Development Status
5.	Sg Rasau Water Supply Scheme	• In respond to issue with the quality of raw water, the Selangor State Government is implementing the Sg Rasau Water Scheme Project. This is considered to be the biggest Off-River Storage Facility (ORS) project in the country. • Details of project: ○ Stage 1 is expected to produce clean water supply to Pulau Indah, Port Klang Free Zone (PKFZ), Pulau Ketam, Taman Bukit Lipat Kajang, Seksyen 16, Bukit Rajah Industrial - North Port, Bukit Tinggi & Botanik, Bandar Puteri & Putera 2, Taman Sri Andalas, Taman Sentosa, Bayu Perdana, Bandar Klang, Teluk Gedung, Persiaran Raja Muda Musa, Sobena Jaya, Pandamaran, Jalan Tengku Badar and up to Sijangkang (Kuala Langat). ○ Stage 2 is expected to produce clean water supply to Klang and Petaling regions.	Under Construction Expected to be completed: State 1: 2024 Stage 2: 2028
6.	Integrated Development Region in South Selangor (IDRISS)	• IDRISS is a strategic economic development effort in southern Selangor that includes various aspects including education, housing, investment, and transportation covering an area of 40,000 acres in the District of Sepang and Kuala Langat. • Proposed development projects include the industrial, logistics services, warehousing, ports, business, housing, tourism and education sectors include Selangor Business Capital, Selangor International Aeropark, Sepang Gold Coast Global Village, Unisel Global Campus, NCT Smart Industrial Park, Pelabuhan Pulau Carey, and Zon Ekonomi Khas Pulau Carey.	• Site clearing • Land conversion process.
7.	The Putrajaya Line (MRT 2)	• Previously known as Sungai Buloh - Serdang-Putrajaya Line. • The alignment will have a length of 56.2 km, consisting of 42.7 km of elevated tracks and 13.5 km running through underground tunnels. • The project was completed and fully open on 16 March 2023.	100% Completed
8.	MRT Circle Line (MRT 3)	• Total Length: 50.8 km • No of Stations: 33 (26 elevated and 7 underground) • The circle line is from Bukit Kiara to PPUM • Link densely populated areas such as Mont Kiara, Segambut, KL Metropolis, Titiwangsa, Setapak, Setiawangsa, Ampang, Salak South, Pandan Indah, Pantai Dalam, Cheras and University Malaya.	Land acquisition process is expected to start in stages from 2024.
9.	Setiawangsa – Pantai Expressway (SPE), KL	• Length: 29.8 Kilometres (Four Sections) • Previously Known as Duta - Ulu Kelang Expressway Phase 3 “Duke Phase 3”. • Seven Interchanges and Toll Plazas. • Dual-Two Carriageway with Four Lanes (Two Lanes on Either Direction). • Start From MRR (Where Interchange with Jalan Genting Klang/ Jalan Kolam Air) And Transverse Across University Tunku Abdul Rahman, Wangsa Maju, Setiawangsa, Ampang, Tun Razak Exchange, Bandar Malaysia, Kerinchi and Connected to Sprint Highway. • The project was completed and fully open on 3 November 2023	100% Completed

No.	Infrastructure Projects	Descriptions	Current Development Status
10.	TRX Underground Tunnel	• Length: 5 Kilometres • The tunnel, which links TRX to a network of 12 major roads and highways including Jalan Sultan Ismail, Maju Expressway (MEX), Setiawangsa-Pantai Expressway (SPE), Jalan Tun Razak and the Smart Tunnel. • Consists of two levels dedicated for vehicles and an additional level exclusively for utility services. • The road network system is supported by the Tun Razak Exchange MRT station, which provides an interchange for both the Kajang and Putrajaya MRT lines. • The project was completed and fully open on 29 November 2023	100% Completed

3.2 Mega Project

No.	Commercial Projects	Descriptions	Current Status
1.	Menara KWSP @ KWASA Damansara	• Location: Plot C8, KWASA Damansara, No. 1 Persiaran Kwasa Utama, Seksyen U4, 40150 Shah Alam, Selangor • Land area: 12.06 hectares • Purpose Built Office (PBO) with Green Building status (Platinum Rated), Intelligent and Smart Building status and Wellness Index status. • The detail of development is as below: ○ 2 blocks of 12-storey office tower with a gross floor area 59,602 sq including 2 storey car park basements provided 1,222 parking bay. • 100% occupied by KWSP	100% Completed with CCC dated 30/05/2022 Opening Ceremony by the Prime Minister on 08/05/2023
2	Central Park Damansara, Damansara Perdana	• Location: Jalan PJU 8/8, Damansara Perdana • Total land area: 10.687 acres (4.3249 hectares) • The detail of development is as below: ○ D'Clover Residences @ Central Park Damansara - land area: 3.27 acres - 1 block of 46 storey building with 593 unit services residence. - Selling price starting at RM918,500.00 to RM1,130,360.00 - Estimated completion year: 2027 ○ D'Terra Residences @ Central Park Damansara - land area: 3.747 acres - 1 block of 49 storey building with 767 units services residence. - Selling price starting at RM749,870.00 to RM979,330.00 - Expected to be completed by January 2027 ○ D'Teserra Residences @ Central Park Damansara - land area: 3.67 acres - 1 block of 49 storey building with 671 units services residence. - Selling price starting at RM899,140.00 to RM1,122,660.00 - Expected to be completed by January 2027	**Phase 1** Under construction 15% Expected completion by January 2027 **Phase 2** Under construction 20% **Phase 3** Under construction 20%

No.	Commercial Projects	Descriptions	Current Status
		○ D'Vine Residences @ Central Park Damansara - Land area: 2.54 acres - 1 block of 46 storey building with 1,450 units Affordable Service Apartment - Selling price at RM270,000.00 - Expected to be completed by September 2026	**Phase 5** Under construction 30%
3.	Suria Garden @ Puchong	• Location: Jalan Puchong Utama 2, Taman Puchong Utama, Puchong, Selangor • Land area: 5.69 acres • Consists of 3 towers of multi-storey service apartments with a total of 972 units. • The detail total units per block are as below : ○ Tower 1 - 444 units of 28 storey service apartment, ○ Tower 2 - 374 units of 27 storey service apartment, ○ Tower 3 - 146 units of 14 storey affordable service apartment (RSKU) and 8 units service apartment. • Built up area : ○ Type A - 81.38 sqm ○ Type B - 85.18 sqm ○ RSKU - 51.65 sqm • Selling price starts from RM516,800.00 to RM657,556.00 and RSKU at RM270,000.00. • Estimated completion: May 2027	Under construction 45% **Phase 1** Expected completion by May 2027
4.	Gravit8, Klang	• Gravit8 is a mixed development project involving apartments, corporate offices, a shopping mall and a hotel which is estimated to cover approximately 15 acres of freehold land in Kota Bayu Emas, South Klang. • The development phase includes: ○ **First Phase:** - 22 office shop units with the size of 4,909 to 18,190 square feet. ○ **Second Phase** - Two tower buildings called Nordica and Andria where both have 4 types of layout design. - A total of 374 units of serviced apartments are in the construction which has started on 1 October 2020. The price of these serviced apartments is between RM510,883.00 and RM787,606.00 with the size of 952 to 1,206 square feet. - There are also 42 affordable housing units with an area of 551 square feet which will be sold at a price of RM270,000.00 per unit. - The expected date of completion and obtaining the certificate of completion and compliance or Certificate of Completion and Compliance (CCC) is in February 2025. ○ **Third Phase** - Development such as offices, boutique hotels, grocery stores, shopping mall.	**Phase 1**: Completed **Phase 2:** Phase 2A Completed **Phase 2B** Completed **Phase 2C** The Tresor Stage of completion 74% **Phase 3:** Future Project
5.	Bandar Bukit Raja, Klang	• The scheme located in Bandar Bukit Raja which offers easy access to major highways such as West Coast Expressway, NKVE, Shahpadu Highway and Federal Highway. • located in a strategic location close to BBR Townpark, Columbia Asia Hospital, AEON Bukit Raja, Terminal Bus Klang Central, schools, commercial centre (Taipan BBR) and other facilities.	

No.	Commercial Projects	Descriptions	Current Status
		• Developer: Sime Darby USJ Development Sdn Bhd • Details of development: **i. Bandar Bukit Raja 2 Fasa R1A (Nadira)** ▪ Nadira is divided into two phases namely Phase R1A-1 and Phase R1A-2. ▪ The development consists of 242 units of two-storey terrace houses - Phase R1A-1 – 119 units, - Phase R1A-2 – 123 units, ▪ The launch of Bandar Bukit Raja Phase 2 R1A (Nadira) is in May 2022 with an area of each unit of 177 square meter - 207 square meter. The launched price starts from RM783,888 – RM1,067,888. ▪ Expected to be completed by 2024 **ii. Bandar Bukit Raja Fasa R11B2 (Lyra)** ▪ Lyra development consists of 156 units of 2-storey terrace houses. ▪ The launched of Bandar Bukit Raja Phase R11B2 (Lyra) is on 2 June 2022 with an area of 161 square meter - 213 square meter for each unit. ▪ Expected to be completed by 2024	Stage of completion: 50% Stage of completion: 100% with CCC dated 23 Oct 2023
6.	Astrum Jelatek/ Ampang	• Location: Jalan Ampang/Jalan Jelatek • Land area: 2.5212 hectares • Developer: Green Stone Development Sdn Bhd • Composition of development: 6 towers comprise of 5,228 units of Rumah SelangorKu with price at RM230,000 per unit. • Floor area: 26.02 square meters (280 square feet) (Studio type). • The project expected to be completed by Oct 2026	Under construction 20%
7.	Traders Park @ Cheras Selatan 2	• Location: Hulu Langat, Bandar Cheras. • Land area: 2.2267 hectares. • Developer: SCP Balakong Sdn Bhd • Consists of 3 blocks of 27-storey service apartments with a total of 899 units. The detail total units per block are as below: ○ Blok A – 297 units, ○ Blok B – 297 units, ○ Blok C – 305 units. • Size unit: 51.28 – 79.80 square meters. • Price Launch: RM314,000 and above • The project expected to be completed in 2025	Under construction 65%
8.	Mutiara Hills, Semenyih	• The total project area covers 485.60 hectares which consists of mixed development which is divided into 3 development sectors consisting of residential, Rumah Selangorku residential program as well as businesses and business hubs. • Pearl Hills is also equipped with the development of recreation areas, school complexes, synagogues, halls and petrol stations. • Details of development : **i. Residential** a) Involves 5 phases in stages b) Double storey terrace houses: 814 units c) Rumah Selangorku: 810 units **ii. Business** a) Shop/office 2 & 3 Floors: 33 units **iii. Petrol Station**	Phase 1A: Under Construction 95%

No.	Commercial Projects	Descriptions	Current Status
9.	Residensi Begonia Selangorku @ Eco Majestic	• Location: This Project is part of the development in the existing project scheme at Eco Majestic. This project is located near the Kajang - Seremban Highway which connects the Lekas Highway to Jalan Semenyih. • There are several planned urban schemes around the subject lot including Setia Ecohill, Setia Ecohill 2 and Tasik Kesuma Town. • Land area: 3.440 hectares • Developer: Trans Loyal Sdn Bhd. • The Begonia Residency Development consists of 3 blocks of 30 storey with the total unit is 933 units. Details of development: ○ Block A – 317 units ○ Block B – 308 units ○ Block C – 308 units • This project is also providing the facilities such as a playground, prayer hall, gymnasium, management office, swimming pool & 24-hour security. • The floor plan area is 1,045 square feet with a launch price of RM250,000.	Under Construction: 25% completed Expected to be completed in 2026
10.	Residensi Oleander Selangorku @ Eco Majestic	• Location: Selangorku Oleander Residency @ Eco Majestic is part of the development in the existing project scheme at Eco Majestic. This project is located near the Kajang - Seremban Highway which connects the Lekas Highway to Jalan Semenyih. • There are several Planned Urban Schemes around the subject lot including Setia Ecohill, Setia Ecohill 2 & Tasik Kesuma Town. • Land area: 48,563.50 meter squares • Developer: Trans Loyal Sdn Bhd • The Oleander Residency Development consists of 4 blocks of 30 storey with the total unit is 1,200 units. Details of development: • Block A & B – 600 units • Block C & D – 600 units • This project also provides facilities such as a playground, prayer hall, gymnasium, management office, swimming pool & 24-hour security. • The floor plan area is 1,045 square feet with a launch price of RM 250,000.	Under Construction: 25% completed Expected to be completed in 2026
11.	Serenia City	• This project consists of 3 new phases that is Serenia Amalia, Serenia Aiora and Serenia Ariya. • Location: Jalan Pintas Dengkil - Putrajaya (FT29), Bandar Serenia, Sepang. • Developer: Sime Darby Property (Serenia City) Sdn Bhd. • Details of development: ➢ **Serenia Amalia:** ○ 202 units of town house and 230 units single storey terrace house. ○ Price: ○ RM250,000.00 – RM300,000.00 for terrace house. ○ RM42,000.00 – RM100,000.00 for town house ○ Built up area: - 65.03 square meters (single storey terrace house) - 65.03 square meters – 69.68 square meters (town house). ○ This phase is under the initiative project of affordable housing Rumah SelangorKu.	**Serenia Amalia:** 95% Expected to be completed in March 2024

No.	Commercial Projects	Descriptions	Current Status
		➢ **Serenia Aiora:** ○ 273 units of double storey terrace house. ○ Land area: - 6.10 meter x 21.34 meter (intermediate/end lot) - 6.60 meter x 21.33 meter (cornet lot) ○ Built up area: - 173.36 square meters (intermediate lot) - 179.95 square meters (end lot) - 198.07 square meters (cornet lot) ○ Price: - RM702,888 – RM745,888 (Intermediate unit) - RM869,888 - RM910,888 (End unit) - RM1,121,888 - RM1,162,888 (Corner unit) ➢ **Serenia Ariya:** ○ 324 units of double storey terrace house. ○ Land area: 6.10 meter x 21.33 meter ○ Built up area: 147.62 square meters – 207.63 square meters ○ Price: RM750,888.00 - RM1,501,888.00. ➢ **Serenia Anisa:** ○ 408 units of double storey terrace house. ○ Land area: (6.70 meter x 21.33) meter – (10.66 meter x 21.33 meter) ○ Built up area: 181.24 square meters – 287.24 square meters ○ Price: RM805,888 – RM2,407,888. ➢ **Serenia Aqila:** ○ 72 units of double storey semi-detached house. ○ Land area: 12.19 meter x 24.38 meter ○ Built up area: 281.47 square meters ○ Price: RM1,712,888 – RM2,760,888.	**Serenia Aiora:** 100% Completed **Serenia Ariya:** completed by the februari 2023 **Serenia Anisa:** Expected to be completed in February 2025 **Serenia Aqila:** Expected to be completed in October 2024
12.	Compass, Kota Seri Langat	• Compass @ Kota Seri Langat is an integrated industrial and logistics hub development located in Kota Seri Langat, Kuala Langat District, Selangor. • The development can be connected via the West Coast Expressway via a special junction as well as a connection to Jalan Langat. • This development offers larger land plot sizes ranging from 9,290.00 square meters to 92,903.00 square meters. • The following is a brief description of the development, namely: a) Covers 80.93 hectares for the Integrated Industrial Park b) Easy access via direct junction to the West Coast Expressway (WCE) c) Permanent Tenure Land d) Location close to cities, ports and major airports e) 24-hour security control system	Start Constuction 20% Expected to be completed in May 2025

No.	Commercial Projects	Descriptions	Current Status
13.	Holiday Inn Sepang	• Holiday Inn Sepang is located in Kota Warisan, Mukim Dengkil, District of Sepang. • Estimated distance is around 49 km to Kuala Lumpur, 13 km to KLIA & 21 km to Putrajaya & Cyberjaya. • The owner of Holiday Inn is Warisan City Development Sdn Bhd in collaboration with IHG (InterContinental Hotels Group). • Type of development: Commercial (Hotel) • The composition of the development includes: - 26 strata type affordable shop units – 20' x 35' (Level 1 - 4) - 253 units hotel rooms (Level 4 -18) - One level car parking area in the basement • The status of completion to date is 100% and is still waiting for the CCC to be issued. • The Hotel has been operating since August 2023 using a temporary licence.	Completed 100%
14.	M Senyum @ Salak Tinggi	• M Senyum is 40.5 hectares (100 acres) landed residential development located at Salak Tinggi. • The development comprising a total of 1,176 units of double storey terrace which are: - Camellia - Camellia 2 - Rosalia - Rosalia 2 - Wisteria (coming soon) - Wisteria 2 (coming soon) - Shoplot (coming soon) **Camellia (Phase 1A)** • 262 units of double storey terrace house. • Land Area: 6.096 m x 18.28 m. • Selling Price: (Min) RM546,000 – (Max) RM731,000. • Project status: 50 -55% **Camellia 2 (Phase 1B)** • 270 units of double storey terrace house. • Land Area : (6.096 m x 18.28 m) and (6.096 m x 21.33 m) • Selling Price: (Min) RM592,000 – (Max) RM837,000 • Project status: 30-40% **Rosalia (Phase 2A)** • 139 units of double storey terrace house • Land Area: (6.096 m x 21.33 m) • Selling Price: (Min) RM719,000 – (Max) RM925,000. • Project status: 35 - 40% **Rosalia 2 (Phase 2B)** • 270 units of double storey terrace house • Land Area :(6.096 m x 18.28 m) and (6.096 m x 21.33 m) • Selling Price: (Min) RM672,000 – (Max) RM929,000 • Project status: 20%	**Phase 1A** Expected completion by May 2025 **Phase 1B** Expected completion by August 2025 **Phase 2A** Expected completion by Dec 2025 **Phase 2B** Expected completion by April 2026

No.	Commercial Projects	Descriptions	Current Status
15.	Robin @ Rimbayu	• Robin @ Rimbayu is the 14th phase of the development in the existing project scheme in Rimbayu township. • The overall development size of the scheme is 3.5 hectares (8.6 acres) consisting of residential and recreational components. • The scheme development consists of 4 phases of 615 units double-storey terrace ○ Phase 14A – 128 units, ○ Phase 14B – 80 units, ○ Phase 14C – 132 units, ○ Phase 14D - 175 units • Type: Land size: 18' x 65', 20' x 65' and 28' x 65'. • Building size: 143 s.m. / 155 s.m. / 187 s.m. • The launched price starts from RM 755,800 to RM1,423,800	100% Completed
16.	Tropicana Aman	**Gemala Residence** • Development type: 116 units of double storey terrace house (Superlink). • Land area: (9.75 meter x 22.86 meter) – (9.75 meter x 26.51 meter) • Built up area: 245.99 square meters – 265.69 square meters • Gross Development Value: RM165 million • Price: RM1,540,800 – RM2,055,800. • Expected completion: February 2025.	Under Construction: 70 - 80% completed Expected completion by February 2025
17.	Gamuda Cove	➢ **Maya Bay** • Development type: 972 units of service apartment. • Built up area: 51.09 s.m. – 89.92 s.m. • Price: RM465,800 – RM731,800. ➢ **Mio Spring** • Development type: 296 units of double storey terrace house. • Land area: (6.096 m x 19.81 m) – (10.36 m x 18.28 m) • Built up area: 171.59 s.m. – 257.99 s.m. - Price: RM1,045,718 – RM2,501,952. • Project status: 0 %	Under Construction: 90-95% completed. Under Construction: 20% completed Expected completion by February 2026
18.	Sejati Lakeside 2	**Sejati Lakeside 2** • Sejati Lakeside 2 is another project after completion of Sejati Lakeside (418 units of 2 storey terrace and 2 storey semi-detached in 3 phase) under Paramount Property Sdn. Bhd. • Gross Development Value: RM191.39 million (Phase 1) & RM191.57 million (Phase 2) • Development type: 234 units of double storey semi-detached house. • The scheme development consists of 2 phases of 234 units double-storey semi-detached houses launched. The composition is divided into: ○ Phase 1 – 122 units, ○ Phase 2 – 112 units, • Land area: (10.972 meter x 22.860 meter) – (10.972 meter x 24.382 meter) • Built up area: 223.62 square meters – 284.19 square meters • Price: RM1,484,400 – RM2,082,800. • Expected completion: June 2025.	Under Construction: 20% completed Expected completion by Jun 2025

No.	Commercial Projects	Descriptions	Current Status
19.	Kampung Sungai Baru Redevelopment Project, Kuala Lumpur City, Federal Territory of Kuala Lumpur.	• Land Acquisition Under the Land Acquisition Act 1960 (Act 486) for the Kampung Sungai Baru Redevelopment Project, Bandar Kuala Lumpur on 38 land titles and 72 strata titles which have been gazette under Section 4 with No. Gazette 9400 dated 18 June 2021 and Section 8 with No. Gazette 9412 dated 21 June 2021. • It's located in Kampung Sungai Baru, a suburb of Kampung Baru, Kuala Lumpur.	Incoming Project (Land Acquisition: Completed)
20.	Flat Taman Rajawali Cheras redevolopment Project	• Land Acquisition Under the Land Acquisition Act 1960 (Act 486) • This project will redevelop 1 block of Rajawali Flat ranging from 80 units to 2 block condominium with 693 units. (332 being replacement units for Rajawali Flats and 345 units being open for sale). • All existing owners will acquire one new condominium unit (House Replacement) with this "Key-to-key Home Swap Redevelopment Concept" without involving any costs to the owner. • Built up area 900 sq ft with 3 bedrooms, 2 bathrooms and 1 carpark bay. • With luxurious condominium facilities such as recreation spaces, sports venues, swimming pools, community halls and others.	Incoming Project
21.	Merdeka 118	• Location: Jalan Hang Jebat, Kuala Lumpur • Land area: 7.6 hectares • The development was divided into three phases. ○ Phase 1 : Iconic Merdeka towers with 118 floors and the surrounding infrastructure; ○ Phase 2 : 118 Mall and Merdeka Boulevard @ 118 linear park; ○ Phase 3 : Three residential towers. • Upon completion, the Merdeka 118 tower will be the region's tallest at 678.90 meter. The figure 118 represents the number of floors in the building. • Spanning over 3.1 million square feet of floor area, the Merdeka 118 tower includes 1.7 million square feet of net lettable area of premium Grade-A rentable office space.	Phase 1: 100% Completed with CCC dated 22/12/2023 Phase 2: Under Construction
22.	Aspire Tower @ KL Eco City	• Location: KL Ecocity, Bangsar, Kuala Lumpur. • Land area : 15.38 acres • The project is a 42-storey office development • The building has a total of 247 units • Price ranging from RM1.6 Million to RM8.4 Million for built up range from 1,152 sf to 3,520 sf. • 66 units sold as at 29/12/2022	100% Completed with CCC dated 26 September 2023.
23.	Pavilion Damansara Heights	• Location: Jalan Damanlela, Damansara Heights, Kuala Lumpur. • Land area: 16 acres • The integrated development project comprises of three blocks of luxurious residences, nine blocks of corporate towers and the 1.2 million square feet retail mall. • Phase 1 - 533,361 square feet net lettable area; • Phase 2 - 529,353 square feet net lettable area; • The mall will also offer 1,800 car park bays for its customers	Phase 1 will be open to the public on 8 October 2023.

No.	Commercial Projects	Descriptions	Current Status
24.	Tun Razak Exchange	• Location: Jalan Tun Razak, Kuala Lumpur • Land area: 28.3 hectares • The master plan includes a total of 30 buildings with a combined gross floor area of 24 million square feet spread across the office, retail, hotel, residences and cultural offerings. • The entire TRX development is anticipated to have a gross development value of more than RM40 billion. ➢ **The Exchange TRX** • Land area: 17 acres • The development consists a hotel, an office building, a two million square foot shopping mall (The Exchange TRX), and six residential towers with a combined 3,800 residential units (known as TRX Residences). ➢ **The Exchange 106** • Height: 445.5 meter • The tallest building in TRX and one of the tallest in Malaysia; • It has 106 floors with massive column-free floor plates ranging from 28,000 to 34,000 square feet; • Phase 1 of The Exchange TRX is made up of the retail podium, which comprises two levels and roughly 70 retail shops. • Phase 1 will be focused on food and beverage (F&B), and service-related offerings and combined with The Exchange TRX, will create over 1.5 million square feet of retail space within the TRX master plan.	The Exchange TRX Mall - completed and open to public on 29 November 2023. The Exchange 106 opened in December 2019. The entire TRX project is expected to be completed in phases over the next 15-20 years.
25.	Menara MAIWP (Majlis Agama Islam Wilayah Persekutuan)	• Headquarters of The Islamic Affair of Federal Territory (Majlis Agama Islam Wilayah Persekutuan - MAIWP) • The project is a 27-storey of Purpose Bult Office with total floor area 18,957 square meters. • Located at Lorong Haji Hussein 2, Kuala Lumpur	Completed with CCC dated 7 Ogos 2023
26.	Bukit Bintang City Centre (BBCC)	• Location: Jalan Hang Tuah, Bukit Bintang, Pudu. • Land area: 19.4 acres • Gross Development value: RM8.7 billion • The leasehold project features 1.4 million square feet retail mall, six luxury residential towers, strata offices, hotels and an 80-storey signature tower. • The development was divided into three phases. **Phase 1** ➢ Lifestyle mall; ➢ 43-storey strata office tower; ➢ An entertainment hub; ➢ Hotel; ➢ A live event hall that can accommodate about 2,500 people; and ➢ Two towers of serviced apartments; **Phase 2** ➢ One office tower; and ➢ Three residential suite towers; **Phase 3** ➢ BBCC signature tower.	**Phase 1** Lifestyle mall, office tower and Two towers of serviced apartments completed. **Phase 2 and 3** Due for completion in 2025

No.	Commercial Projects	Descriptions	Current Status
27.	The Met Corporate Towers	• Location: Jalan Dutamas, Kuala Lumpur. • Premium grade-A strata title corporate office tower. • Part off development KL Metropolis • Comprise 2 towers office buildings; 30 and 42 floors. ○ 42 storey tower: 356 office spaces ○ 30-storey tower: 132 offices spaces • Stated at OSC that the building is in the final stage of inspection before CCC issued.	100% Completed with CCC dated 16 August 2023
28.	Terra @ Precinct 8	• Location: Precinct 8, Putrajaya • A lakeside mixed development with component of luxury apartment, services apartment, waterfront retail, retail mall including offices and event hall • Expected completion at 2024	Under construction with 40% - 45% completion
29.	Residensi Sakura	• Located at Precinct 11, Putrajaya • The project comprises 463 units of condominium with the size ranging from 828 sq.ft to 2,120 sq.ft. • Price ranging from RM350,000 – RM980,000 • Expected completion at January 2026	Under construction @ 60% - 65%
30.	Teja (Fasa 1)	• Located at Precinct 16, Putrajaya • The project comprises 28 units of 2½ storey terrace house with freehold tenure. • The units priced from RM1,386,000.00 with Built-up 2,944 sq.ft to 3,753 sq. ft and Land Area from 1,432 sq.ft - 3,563 sq.ft. • Expected completion at January 2025	Under construction @ 15% - 20%

3.3 State Government Policy

State	Descriptions
Selangor	**1. Rumah Idaman** • Rumah Idaman is an initiative and formula by MBI Selangor and the Selangor State Government to provide a solution for home ownership to Selangor citizens. The objective is to achieve the Selangor State Housing Policy in providing "A Perfect Home for A Family". • It is an upgraded Rumah Selangorku with better specifications and interior fixtures and fittings like tile, furniture, etc offered to B40 and M40 that does not own a house yet.
	2. Skim Smart Rental and Skim Smart Rental Ownership to Stay (2Stay) • Was introduced in 2020 and continues until 2023 • This programmed is affordable rental for maximum of 5 years renting period with the option to transition to a rent-to-own scheme. • Tenants are eligible for a 30% rebate of their total rent payment. • The rental of Rumah SelangorKu Harapan and Rumah Idaman units is aimed at helping those who find it difficult to get a bank loan to buy their first house as well as helping the low-income group (B40) to own a home for less than RM200,000. • Rumah Selangorku Harapan and Rumah Idaman units are equipped with air **conditionin**g, kitchen cabinets, clothes cabinets and water heaters.
	3. Skim Ceria Home Repair Programme • This scheme was introduced to repair a house for B40 group which is the property which is considered are not suitable for occupied. • Selangor State Government has allocated RM10 million for the year 2023.

<table>
<tr><th>State</th><th>Descriptions</th></tr>
<tr><td rowspan="5">Selangor</td><td>

4. Insurance Scheme for Low-cost Flats
- This scheme was established to resolve the inability of JMB/MC in low-cost flats to insure buildings in accordance with Section 93 of the Strata Management Act 2013 (Act 757).
- It is purpose is to help JMB/MC to bear the cost of damage due to natural disasters.

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5. Selangor Affordable Homes (Rumah Selangorku 3.0)
- This policy is provided to supersede the Selangorku 2.0 and have been implemented since 2 April 2018.
- This policy still maintained its objective as “Satu Keluarga Satu Kediaman Yang Sempurna”.
- Previously Rumah Selangorku have been classified into various types of units, depending on the income level.
- Under the Rumah Selangorku 3.0 initiative which was launched in January 2023, there are some changes in the aspect of development zones, development components, specifications, development control and enforcement.
- The development has been categorised into 4 zones as follows:
  - Zone 1: High Density Area
  - Zone 2: Urban Area
  - Zone 3: Sub-Urban Area
  - Zone 4: Rural Area
- The components of developments as follows:

Types	Minimum Area/ No of Rooms	Selling Price (RM)
Solo	450 square feet / 1 Room	114,750.00
Duo	600 square feet / 2 Rooms	153,000.00
Trio	750 square feet / 3 Rooms	191,250.00
Quad	900 square feet / 3 Rooms	229,500.00
Quad (terraced)	900 square feet (20’ x 60’)	250,000.00

- Rumah Selangorku 3.0 also offers an option for singles with a 1-room unit of 450 square feet at a price of RM114,750 for singles aged 30 and under and still working in the city center.

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6. Integrated Development Region in South Selangor (IDRISS)
- Government Incentives towards IDRISS development project such as follows:
  - Special premium scheme
  - Interest free instalment of development charge
  - Exemption of vacant land Assessment Rate
  - 50% off for building Assessment Rate
  - Exemption of business license fee

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7. Housing Quota for Single Mother
- Selangor State Government provides a special quota for single mother to own a property via Rumah Selangorku scheme.
- This will be realised between the cooperation of Lembaga Perumahan Hartanah Selangor (LPHS) and the developer

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8. Smart-Biaya Scheme
- Selangor State Government has introduced the Smart-Biaya Scheme to show their concern towards home ownership in Selangor that can be achieved effectively especially for first-time buyers.
- The incentives that been offered through this scheme as follows:
- Provide 10% – 15% deposit
- Syariah compliance loan
- Affordable monthly instalment
- Flexible instalment to those insists to do early settlement
- Assessable from “one stop center” website including financial advisor service.

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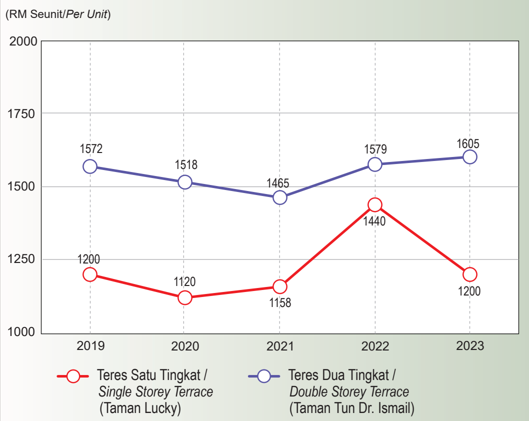
State	Descriptions
Selangor	**9. Program Bina Baru dan Baikpulih Rumah Kerajaan Prihatin** • The programmed provides home repair for B40 homeowners living in a property which is considered not suitable for occupancy. • Selangor State Government has allocated RM 3 million for year 2023 compared to previous year was only RM1 million
	10. Post-COVID-19 Affordable Homes Construction Incentives • The programmed was introduced by waiving of development fees (RM500) for all affordable housing projects in Selangor until 2023. • Reduction of land premium deposit from 150% to 100% for Selangor.

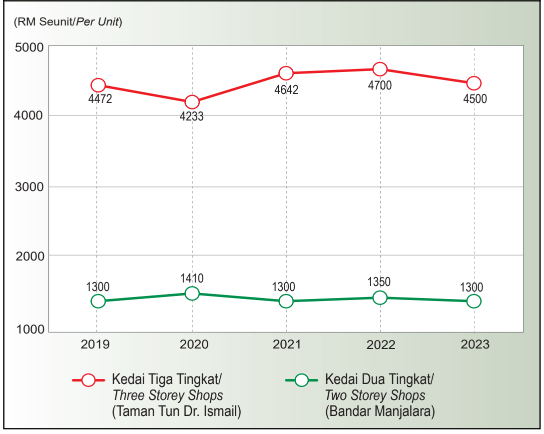
KUALA LUMPUR 1.1

Pergerakan Harga Purata Rumah Teres di Kuala Lumpur
Average Price Movements of Terraced Houses in Kuala Lumpur



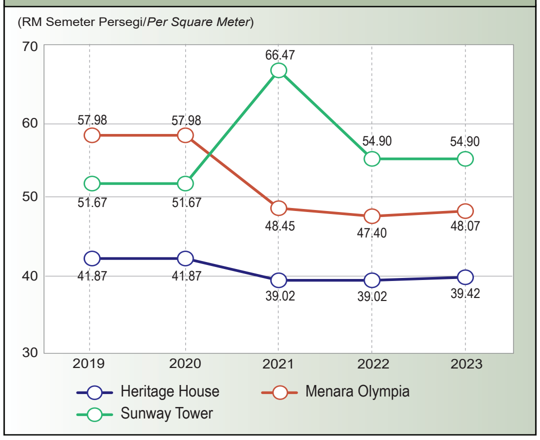
KUALA LUMPUR 1.2

Pergerakan Harga Purata Kedai di Kuala Lumpur
Average Price Movements of Shop in Kuala Lumpur



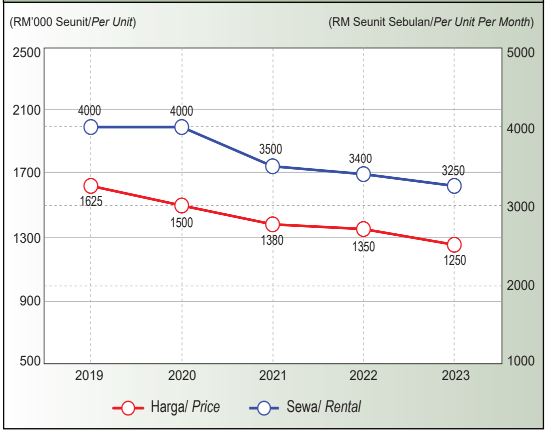
KUALA LUMPUR 1.3

Pergerakan Sewaan Purata Pejabat Binaan Khas di Kawasan CBD, Kuala Lumpur
Average Rental Movements of Purpose-Built Office in CBD Area, Kuala Lumpur



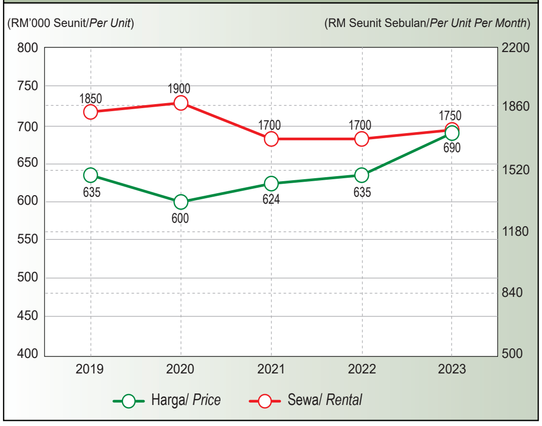
SELANGOR 4.1

Pergerakan Harga Dan Sewa Purata Rumah Berkembar Satu Tingkat di Petaling Jaya
Average Price and Rental Movements of Single Storey Semi-Detached Houses in Petaling Jaya



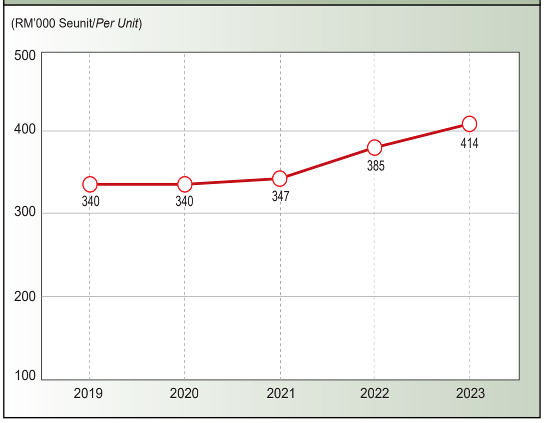
SELANGOR 4.2

Pergerakan Harga dan Sewa Purata Rumah Teres Dua Tingkat di Shah Alam
Average Price and Rental Movements of Double Storey Terraced Houses in Shah Alam



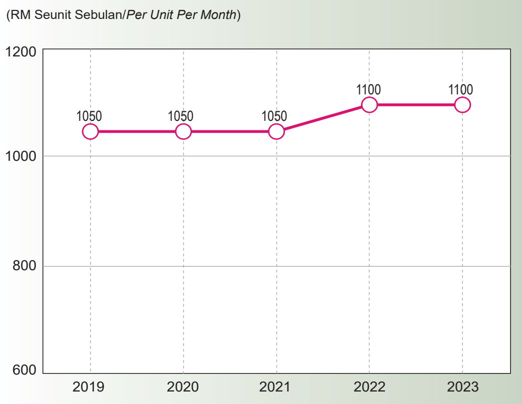
SELANGOR 4.3

Pergerakan Harga Purata Pangsapuri Lima Tingkat di Subang Perdana
Average Price Movements of Five Storey Apartment in Subang Perdana



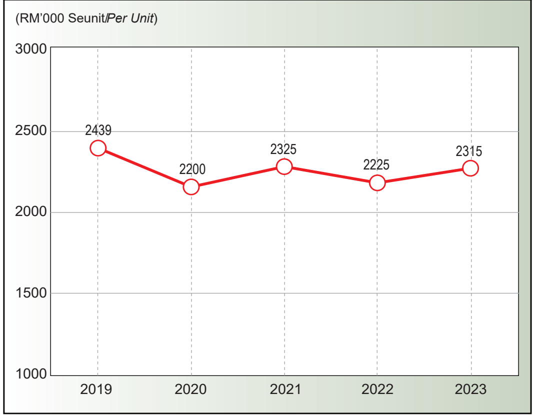
SELANGOR 4.4

Pergerakan Sewaan Purata Pangsapuri Lima Tingkat di Shah Alam
Average Rental Movements of Five Storey Apartment in Shah Alam



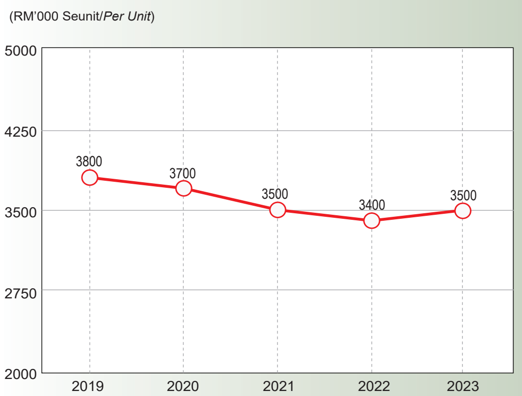
SELANGOR 4.4

Pergerakan Harga Purata Kedai Dua Tingkat di Petaling Jaya
Average Price Movements of Double Storey Shop in Petaling Jaya



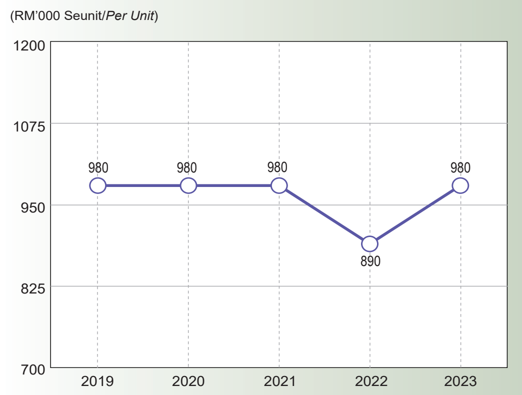
SELANGOR 4.6

Pergerakan Harga Purata Kedai Tiga Tingkat di USJ 10
Average Price Movements of Three Storey Shop in USJ 10



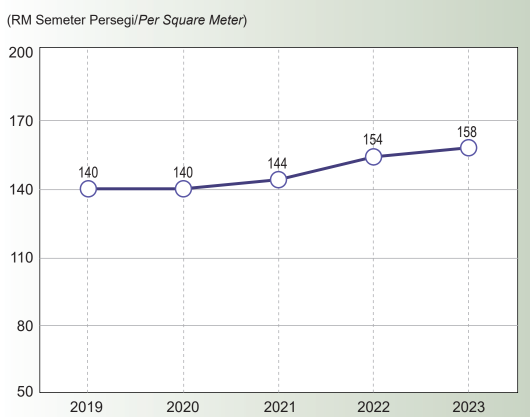
SELANGOR 4.7

Pergerakan Harga Purata Kedai Empat Tingkat di Bandar Klang
Average Price Movements of Four Storey Shop in Bandar Klang



SELANGOR 4.8

Pergerakan Sewaan Purata Ruang Niaga di Pusat Membeli-belah The Curve, Petaling Jaya
Average Rental Movements of Office Space in The Curve, Petaling Jaya



SELANGOR 4.9

Pergerakan Sewaan Purata Ruang Pejabat di Menara Consplant, Subang Jaya
Average Rental Movements of Office Space in Menara Consplant, Subang Jaya