

Fundamentals:

Hong Kong stocks edged higher Monday as falling oil prices eased inflation concerns, while investors watched for signs of improved energy supplies amid ongoing Middle East tensions.

The Hang Seng Index rose 59.85 points, or 0.3%, to close at 24,271.20, while the Hang Seng China Enterprises Index gained 20.70 points, or also 0.3%, to 8,168.57.

Oil prices fell after U.S. President Donald Trump said Russia and Ukraine had agreed to stop attacking each other's energy facilities, raising expectations of increased Russian oil supplies. The move eased concerns over energy costs even as tensions in the Gulf continued.

In corporate developments, HK AI Capital (HKG:1140) said it plans to stop acquiring artwork and sell its existing portfolio, targeting sales of HK\$500 million by Aug. 31, 2027, and HK\$900 million by Aug. 31, 2028. Shares of the company rose more than 2%.

Transcanta's (HKG:6629) subsidiary received a Chinese invention patent for antibodies targeting Claudin18.2 and their use in diagnostic applications, including development of a companion diagnostic test for its lead cancer drug candidate osemitamab. Shares of the company fell 5%.

South Korea's Kospi drops as much as 3.2% as chip stocks show delayed reaction to a slide in global semiconductor shares last week following OpenAI revenue debate. Korean market was closed on Friday for a holiday.

Taiwan's Taiex ended nearly unchanged and the Sensex in India dropped 0.8%.

(Source: MT Newswires)

Mini Hang Seng Futures Daily Chart



Mini Hang Seng China Enterprise Futures Daily Chart



Contracts	Chg	Sett	High	Low
H. SENG FUT OCT 26	54	24246	24483	24128
H. SENG FUT NOV 26	51	24235	24450	24139
H. SENG FUT DEC 26	44	24257	24488	24150
H. SENG FUT JAN 27	54	24246	24483	24128
MINI H. SENG FUT OCT 26	54	24246	24483	24128
MINI H. SENG FUT NOV 26	51	24235	24470	24125
MINI H. SENG FUT DEC 26	44	24257	24480	24146
MINI H. SENG FUT MAR 27	54	24246	24483	24128
HSCEI FUT OCT 26	25	8160	8238	8118
HSCEI FUT NOV 26	27	8163	8237	8120
HSCEI FUT DEC 26	22	8159	8238	8126
HSCEI FUT JAN 27	25	8160	8238	8118
MINI HSCEI FUT OCT 26	25	8160	8238	8117
MINI HSCEI FUT NOV 26	27	8163	8236	8128
MINI HSCEI FUT DEC 26	22	8159	8235	8123
MINI HSCEI FUT MAR 27	25	8160	8238	8117

Major HSI Constituent Stocks	Close	Change	High	Low
*AIA Group Ltd	71.9	0.65	72.7	71.3
**Tencent Holdings Ltd	425.8	1	430.4	423.4
*HSBC Holdings PLC	148.1	2.9	149.1	145.4
**China Construction Bank Corp	9.91	0.175	9.93	9.72
**Ping An Insurance Group	51.65	-0.2	52.6	51.5
**Meituan	71.8	0.3	72.3	71.25
*Hong Kong Exchanges & Clearing Ltd	375.4	-2.4	381.2	375.2
**Alibaba Group Holdings Ltd	108.2	1.2	110.4	107.8
**Xiaomi Corp	24.52	-1.44	25.84	24.3
**iCBC	7.62	0.12	7.62	7.465

Major HSCEI Constituent Stocks	Close	Change	High	Low
*Wuxi Biologics Cayman Inc	52.65	-1.2	54.65	52.5
**China Mobile Ltd	79.95	-0.15	80.65	79.85
**Bank of China Ltd	6.25	0.125	6.255	6.09
*Techtronic Industries Co Ltd	127.5	0	129.9	127.3
*CK Hutchison Holdings Ltd	66.2	-0.45	67.4	65.95
*Link REIT	37.26	-0.06	37.66	37.24
*CLP Holding Ltd	77.3	0.3	77.3	76.6
**Geely Automobile Holdings Ltd	15.11	-0.02	16.06	15.05
**CNOOC Ltd	24.14	0.24	24.18	23.68
**ANTA Sports Products Ltd	71.1	-1.55	74.65	70.7

Global Equity Indices	Close	Change	High	Low
Hang Seng	24271.20	59.85	24455.95	24193.3
HSCEI	8168.57	20.7	8235.69	8130.63
Shanghai Comp Index	3797.24	-16.549	3828.216	3790.995
Nikkei 225	0	0	0	0
KOSPI	6384.24	-241.69	6589.69	6368.49
S&P/ASX200	8783.17	66.533	8793.9	8734.7
DJIA	51818.1	163.13	51928.1	51718.6
S&P 500	7798.74	-12.8	7821.67	7796.94
NASDAQ	27224.8	-141.34	27376.66	27219.42
DAX	25277.7	190.41	25315.75	25166.57
CAC	7832.88	0.38	7850.33	7806.49
FTSE100	10656.3	104.23	10656.28	10549.64

Technical Analysis

Mini Hang Seng

1st Resistance:	24610	2nd Resistance:	24973
1st Support:	23882	2nd Support:	23519
MACD:	-271.182		
MACD DIFF:	-20.8407		
RSI:	43.7695		

Mini Hang Seng China Enterprise

1st Resistance:	8282	2nd Resistance:	8405
1st Support:	8038	2nd Support:	7915
MACD:	-68.772		
MACD DIFF:	0.656		
RSI:	47.2419		

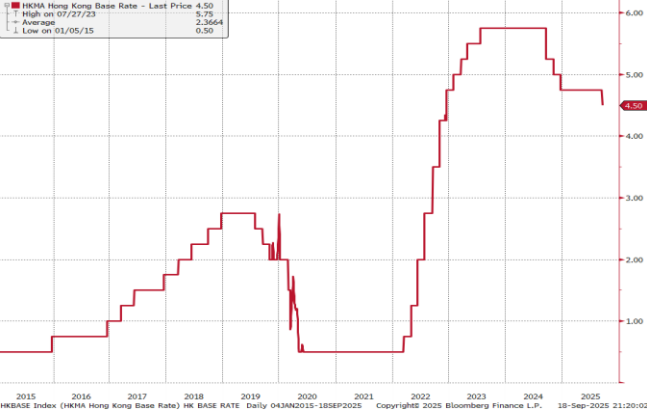
Hong Kong Economic Releases		Period	Survey	Actual	Prior	Revised
09/30/2026 16:30	Money Supply M1 HKD YoY	Aug	--	4.70%	-0.80%	--
09/30/2026 16:30	Money Supply M2 HKD YoY	Aug	--	9.90%	5.60%	--
09/30/2026 16:30	Money Supply M3 HKD YoY	Aug	--	9.90%	5.50%	--
10/02/2026 16:30	Retail Sales Value YoY	Aug	4.20%	5.60%	4.50%	--
10/02/2026 16:30	Retail Sales Volume YoY	Aug	2.20%	2.90%	2.30%	2.40%
10/06/2026 08:30	S&P Global Hong Kong PMI	Sep	--	49.2	49.5	--
10/22/2026 16:30	Unemployment Rate 3Mths	Sep	--	--	3.80%	--
10/22/2026 16:30	CPI Composite YoY	Sep	--	--	1.70%	--
10/30/2026 16:30	Money Supply M1 HKD YoY	Sep	--	--	4.70%	--
10/30/2026 16:30	Money Supply M2 HKD YoY	Sep	--	--	9.90%	--
10/30/2026 16:30	Money Supply M3 HKD YoY	Sep	--	--	9.90%	--

China Economic Releases		Period	Survey	Actual	Prior	Revised
09/30/2026 09:30	Manufacturing PMI	Sep	50.1	50.1	49.8	--
09/30/2026 09:30	Composite PMI	Sep	--	50.7	49.5	--
10/09/2026-10/15/2026	Money Supply M2 YoY	Sep	--	--	7.50%	--
10/09/2026-10/15/2026	Money Supply M1 YoY	Sep	--	--	4.10%	--
10/09/2026-10/15/2026	Money Supply M0 YoY	Sep	--	--	11.20%	--
10/12/2026-10/18/2026	FDI YTD YoY CNY	Sep	--	--	-5.30%	--
10/14/2026 09:30	CPI YoY	Sep	--	--	0.80%	--
10/19/2026 10:00	GDP YoY	3Q	--	--	4.30%	--
10/19/2026 10:00	GDP YTD YoY	3Q	--	--	4.70%	--
10/19/2026 10:00	GDP SA QoQ	3Q	--	--	0.90%	--
10/19/2026 10:00	Retail Sales YoY	Sep	--	--	0.40%	--
10/19/2026 10:00	Retail Sales YTD YoY	Sep	--	--	1.10%	--
10/31/2026 09:30	Manufacturing PMI	Oct	--	--	50.1	--
10/31/2026 09:30	Composite PMI	Oct	--	--	50.7	--

Hong Kong GDP Q on Q



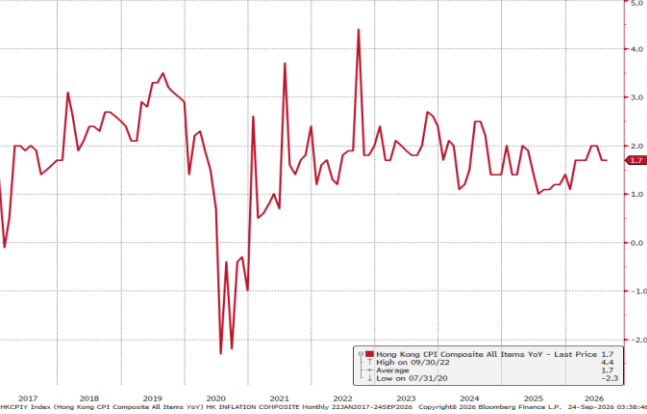
Hong Kong Base Interest Rate



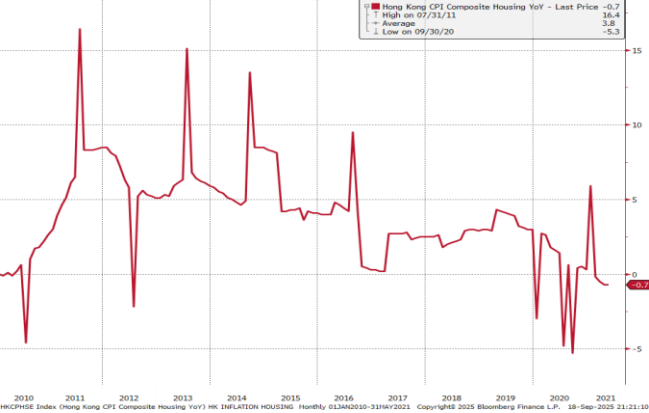
Hong Kong Unemployment Rate



Hong Kong Composite Inflation



Hong Kong Housing Inflation



Hong Kong Retail Sale Value Y on Y %



(Source: Bloomberg)

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