

**KEMENTERIAN EKONOMI
JABATAN PERANGKAAN MALAYSIA**

STATISTIK KECENDERUNGAN PERNIAGAAN *BUSINESS TENDENCY STATISTICS*

**SUKU KEEMPAT
FOURTH QUARTER 2023**

Pemakluman

DOSM telah melancarkan OpenDOSM NextGen sebagai medium yang menyediakan katalog data dan visualisasi bagi memudahkan pengguna menganalisis pelbagai data dan boleh diakses melalui portal <https://open.dosm.gov.my>.

Jabatan Perangkaan Malaysia (DOSM) akan menjalankan Banci Pertanian pada tahun 2024. Mohon layari <https://www.myagricensus.gov.my> untuk maklumat lanjut. Tema adalah “Banci Pertanian, Kunci Kemajuan Pertanian.”

Kerajaan Malaysia telah mengisytiharkan Hari Statistik Negara (MyStats Day) pada 20 Oktober setiap tahun. Tema sambutan MyStats Day adalah “Statistik Nadi Kehidupan”.

Announcement

DOSM has launched OpenDOSM NextGen as a medium that provides a catalog of data and visualisations to facilitate users' analysis of various data and can be accessed through <https://open.dosm.gov.my>.

The Department of Statistics Malaysia (DOSM) will conduct the Agricultural Census in 2024. Please visit <https://www.myagricensus.gov.my> for more information. The theme is “Agriculture Census, Key to Agriculture Development.”

The Government of Malaysia has declared National Statistics Day (MyStats Day) on October 20th each year. MyStats Day theme is “Statistics is the Essence of Life”.

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DEPARTMENT OF STATISTICS MALAYSIA**

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Pengguna yang mengeluarkan sebarang maklumat dari terbitan ini sama ada yang asal atau diolah semula hendaklah meletakkan kenyataan berikut:

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KATA PENGANTAR

Penerbitan Statistik Kecenderungan Perniagaan ini mengandungi statistik bagi pelbagai sektor ekonomi di Malaysia berdasarkan data yang diperoleh daripada Survei Kecenderungan Perniagaan. Kajian ini dijalankan secara suku tahunan. Statistik Kecenderungan Perniagaan disusun berpandukan garis panduan dan saranan yang disyorkan oleh *Organisation for Economic Co-operation and Development* (OECD) dengan merujuk kepada *Business Tendency Survey: A Handbook*, 2003.

Penerbitan ini memaparkan jangkaan prestasi perniagaan bagi tiga dan enam bulan akan datang. Konsep perakaunan digunakan untuk menganalisis data bagi menghasilkan indikator kecenderungan perniagaan.

Bahagian pertama penerbitan ini membentangkan ringkasan penemuan. Bahagian kedua pula memuatkan jadual terperinci bagi membolehkan pengguna menganalisis kecenderungan keadaan perniagaan di Malaysia bagi tempoh sebelum, semasa dan akan datang. Ini diikuti oleh bahagian ketiga yang mengandungi nota teknikal untuk menerangkan konsep, definisi dan metodologi bagi membantu pengguna memahami statistik yang diterbitkan.

Jabatan merakamkan ucapan terima kasih dan penghargaan tulus ikhlas kepada semua pihak yang telah menyumbang di dalam penerbitan ini, terutamanya kepada responden yang memberikan kerjasama dalam membekalkan data yang diperlukan. Setiap maklum balas dan cadangan untuk penambahbaikan laporan ini pada masa akan datang amat dihargai.

DATO' SRI DR. MOHD UZIR MAHIDIN

Ketua Perangkawan Malaysia

November 2023

PREFACE

The Business Tendency Statistics publication consists of statistics on various economic sectors in Malaysia based on the data collected from the Business Tendency Survey. The survey is conducted on a quarterly basis. The Business Tendency Statistics are compiled based on the guidelines and recommendations by the Organisation for Economic Co-operation and Development (OECD) with reference to the Business Tendency Survey: A Handbook, 2003.

This publication presents the expectations of business performance for the next three and six months. An accounting concept is used for the analysis of the data to produce business tendency indicators.

The first part of this publication focuses on the summary of findings. The second part presents detailed tables to facilitate users in analysing the tendency of business situation in Malaysia for the past, current and near future. This is followed by the third part which contains the technical notes explaining the concepts, definitions and methodology to assist users to understand the published statistics.

The Department would like to express its sincere gratitude and appreciation to all who have contributed in this publication, especially to the respondents for their cooperation in providing the necessary data. Every feedback and suggestion towards improving future publication is highly appreciated.

DATO' SRI DR. MOHD UZIR MAHIDIN

Chief Statistician Malaysia

November 2023

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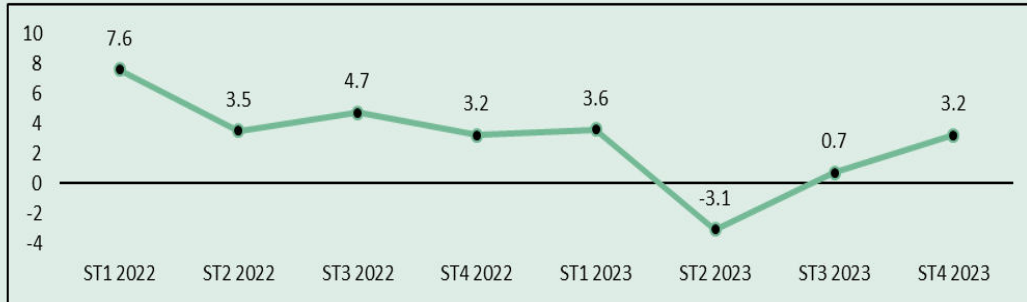
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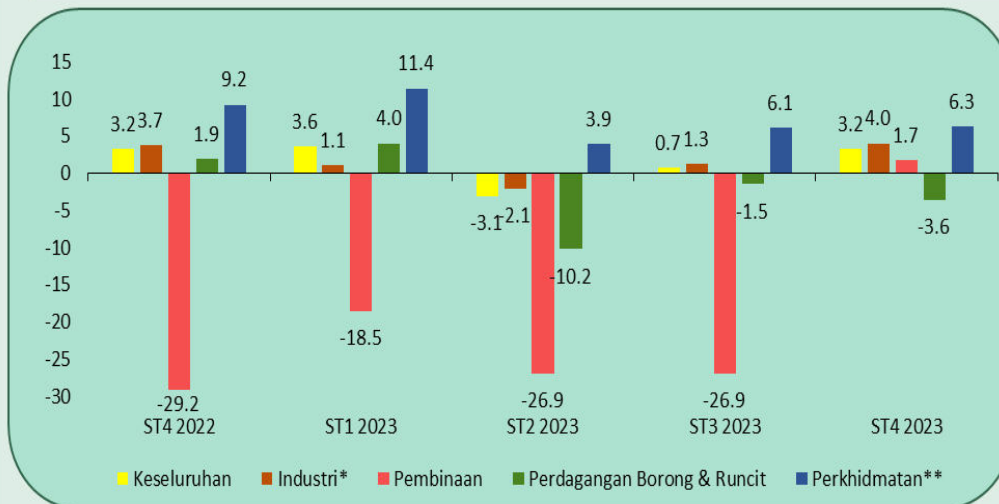
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STATISTIK KECENDERUNGAN PERNIAGAAN



Keyakinan perniagaan meningkat 3.2 peratus pada ST4 2023, mencerminkan perniagaan terus berkembang



+3.2%
(+0.7%)
Petunjuk

Keyakinan

Okt. – Dis. 2023

(Julai – Sept. 2023)

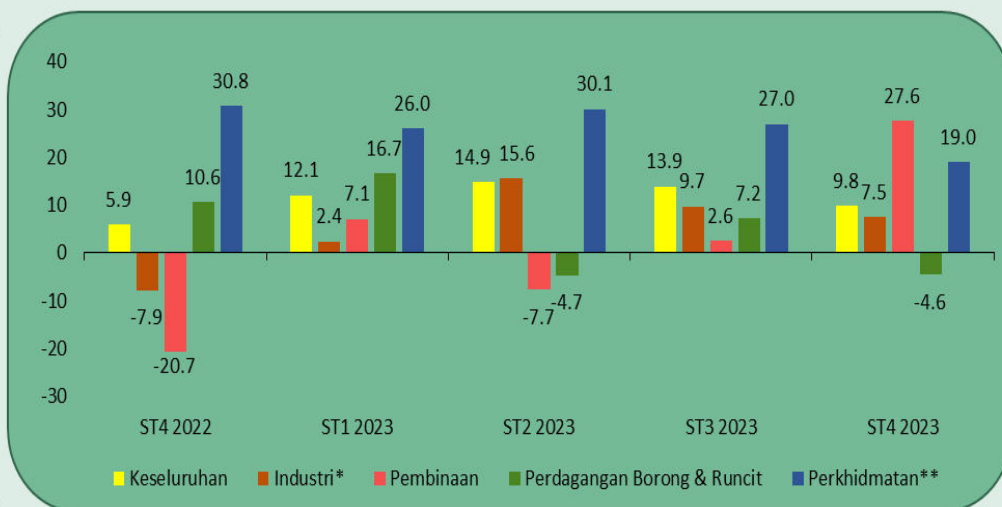


+9.8%
(+13.9%)

Imbangan Bersih

Okt.2023 – Mar 2024

(Julai – Dis. 2023)



* Pertanian, Perlombongan, Pembuatan dan Elektrik & Air

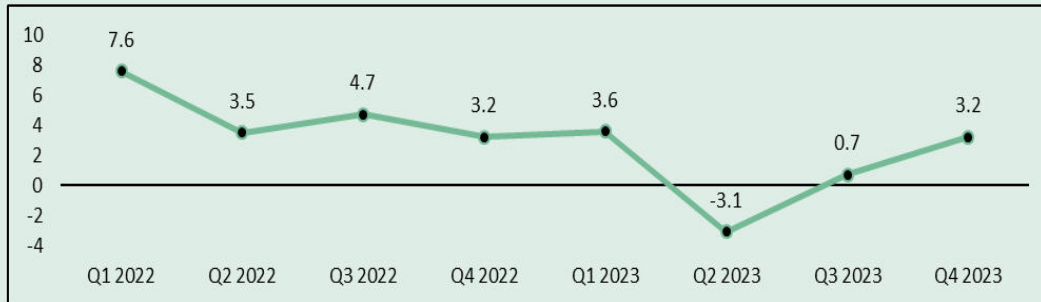
** Penginapan, Pengangkutan & Penyimpanan, Komunikasi, Kewangan, Insurans, Hartanah, Teknologi Maklumat & Komunikasi, Makanan & Minuman, Pentadbiran dan Sokongan, Profesional, Kesihatan, Pendidikan dan Perkhidmatan Lain

Sumber: Statistik Kecenderungan Perniagaan Suku Keempat 2023, Jabatan Perangkaan Malaysia (DOSM)

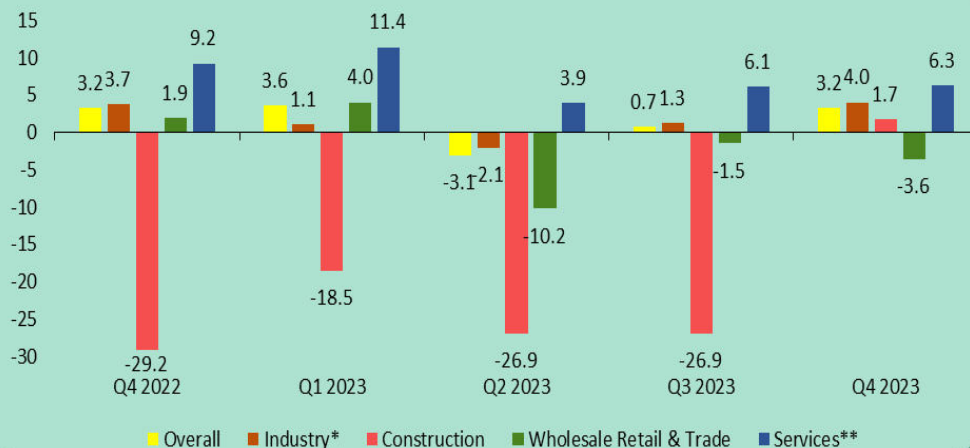
MAIN FINDINGS



BUSINESS TENDENCY STATISTICS



Business confidence increased 3.2 per cent in Q4 2023, reflecting that business continues to expand

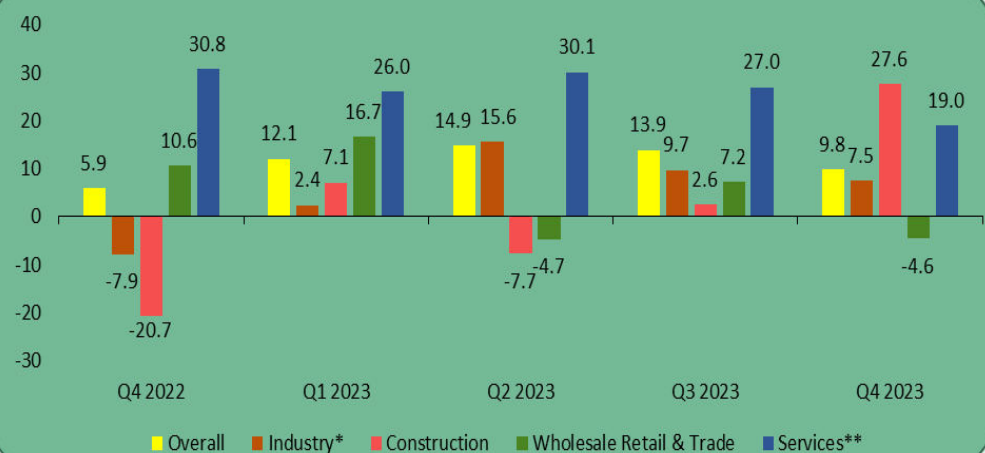


+3.2%
(+0.7%)
Confidence Indicator
Oct. – Dec. 2023
(July. – Sept. 2023)



+9.8%
(+13.9%)
Net Balance

Oct.2023 – Mac. 2024
(July – Dec. 2023)



* Agriculture, Mining, Manufacturing and Electricity & Water

** Accommodations, Transportation & Storage, Communication, Finance, Insurance, Real Estate, Information Technology & Communication, Food & Beverage, Administrative & Support Services, Professional, Health, Education and Other Services

Source: Business Tendency Statistics Fourth Quarter 2023, Department of Statistics Malaysia (DOSM)

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NOTA TEKNIKAL
TECHNICAL NOTES

STATISTIK KECENDERUNGAN PERNIAGAAN, SUKU TAHUN KEEMPAT 2023

Statistik Kecenderungan Perniagaan memaparkan jangkaan prestasi perniagaan bagi tiga bulan dan enam bulan yang akan datang. Statistik ini berdasarkan Survei Kecenderungan Perniagaan yang dijalankan secara suku tahunan.

Laporan ini menyediakan jangkaan prestasi perniagaan bagi suku tahun keempat 2023 dan tempoh enam bulan akan datang iaitu Oktober 2023 hingga Mac 2024.

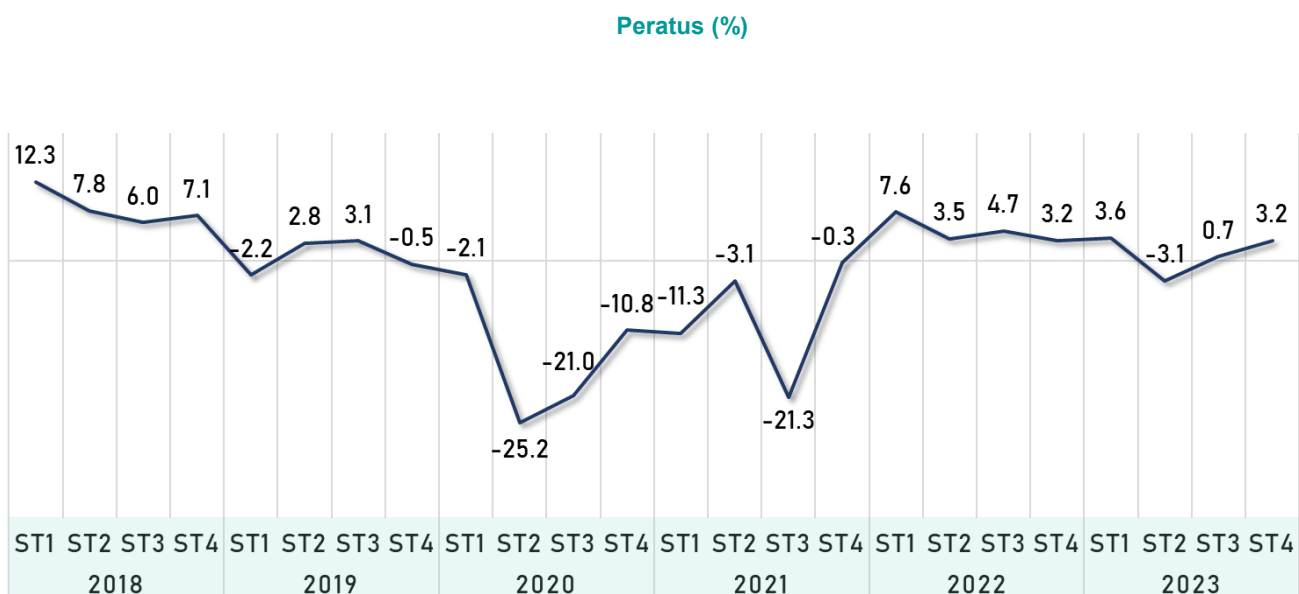
RAMALAN PRESTASI PERNIAGAAN SUKU TAHUN KEEMPAT 2023

Peniaga menjangkakan suasana perniagaan yang lebih baik pada suku tahun keempat 2023, dengan petunjuk keyakinan positif sebanyak 3.2 peratus, meningkat daripada 0.7 peratus pada suku tahun ketiga 2023. (Paparan I)

PETUNJUK KEYAKINAN

Petunjuk keyakinan merupakan satu petunjuk jangka pendek yang merumuskan pandangan keseluruhan mengenai keadaan perniagaan dalam pelbagai sektor di Malaysia. Petunjuk keyakinan dihitung sebagai purata jumlah imbalan bersih bagi pembolehubah terpilih.

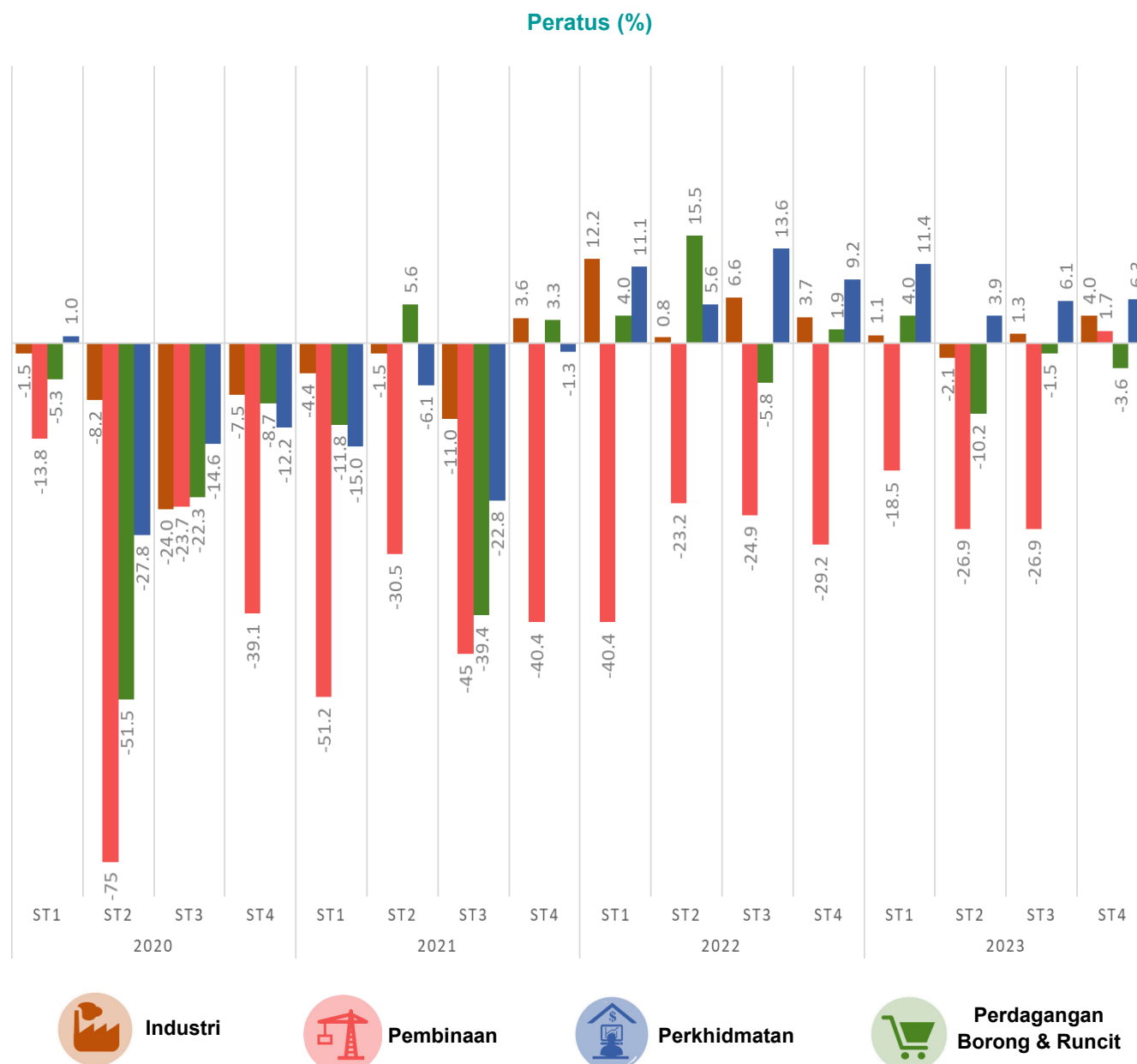
 **Paparan I: Petunjuk Keyakinan Suku Tahunan, Malaysia, 2018-2023**



Perkhidmatan, Industri dan Pembinaan adalah tiga sektor yang menjangkakan keadaan perniagaan yang lebih baik pada suku tahun keempat 2023. Keyakinan perniagaan bagi sektor Perkhidmatan kekal pada trajektori positif, dengan petunjuk keyakinan meningkat kepada +6.3 peratus berbanding +6.1 peratus pada suku tahun sebelumnya. Sementara itu, sektor Industri terus optimis terhadap prestasi perniagaan, dengan petunjuk keyakinan sebanyak +4.0 peratus bagi suku tahun yang sama berbanding +1.3 peratus pada suku tahun ketiga 2023. Pada masa yang sama, sentimen dalam sektor Pembinaan meningkat kepada trajektori positif buat pertama kalinya semenjak suku tahun pertama 2018 dengan catatan +1.7 peratus berbanding -26.9 peratus pada suku tahun ketiga 2023.

Walau bagaimanapun, peniaga dalam sektor Perdagangan Borong & Runcit menjangkakan prospek perniagaan yang pesimistik, dengan petunjuk keyakinan sebanyak -3.6 peratus pada suku tahun keempat 2023 berbanding -1.5 peratus pada suku tahun sebelumnya. (Paparan II)

Paparan II: Petunjuk Keyakinan Suku Tahunan mengikut Sektor, Malaysia, 2020-2023



Jangkaan Hasil Kasar dan Bilangan Pekerja

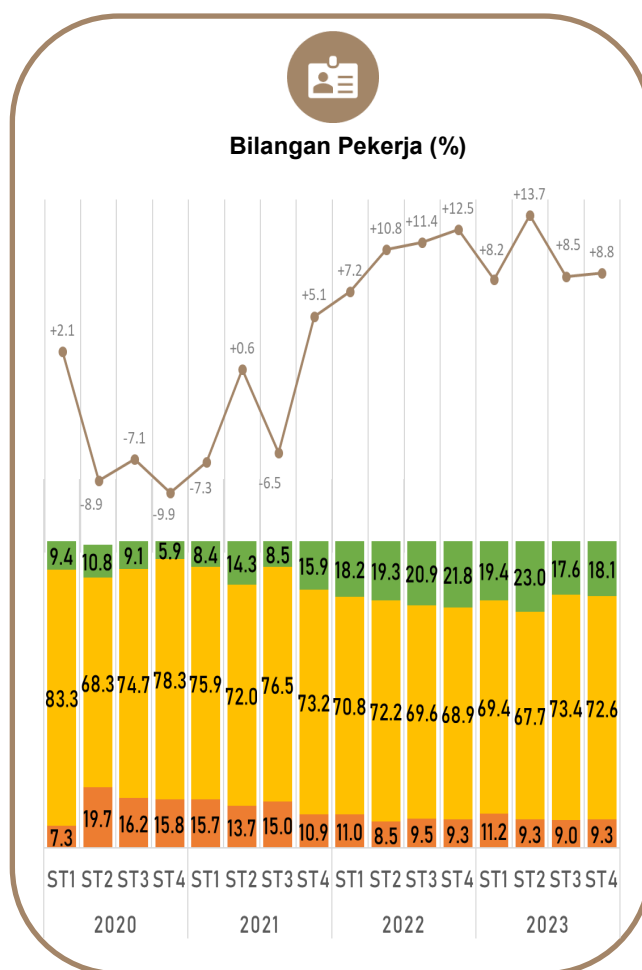
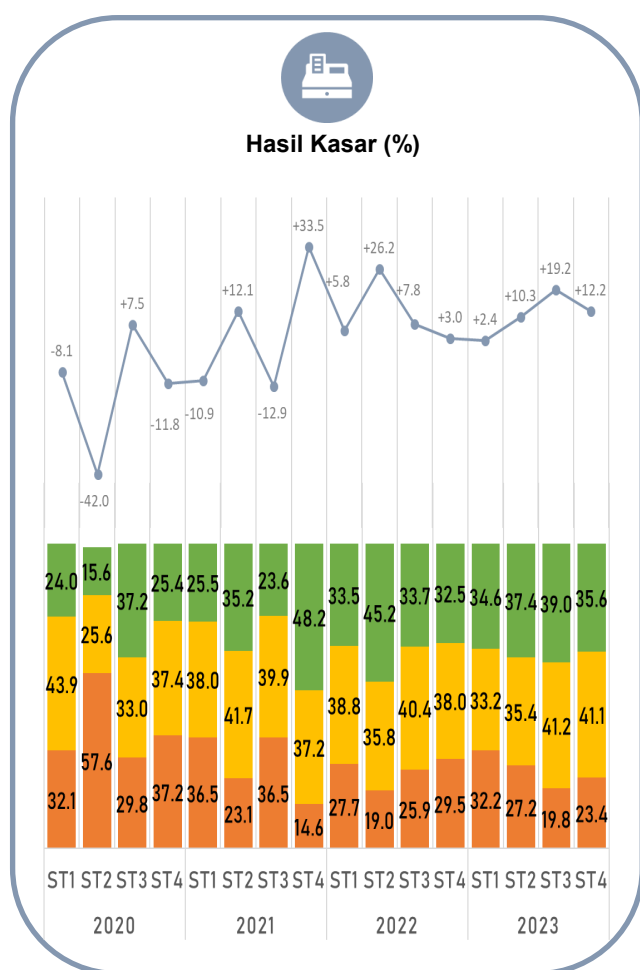
Sejumlah 35.6 peratus responden menjangkakan hasil kasar mereka meningkat pada suku tahun keempat 2023, manakala 23.4 peratus pula menjangkakan penurunan, menghasilkan imbalan bersih berjumlah +12.2 peratus. Pada masa yang sama juga, 41.1 peratus responden meramalkan hasil kasar mereka tidak berubah.

Dari segi pekerjaan, 72.6 peratus peniaga menjangka untuk mengekalkan pekerja mereka sehingga suku tahun keempat 2023. Sebanyak 18.1 peratus responden menjangkakan untuk mengambil lebih ramai pekerja, manakala 9.3 peratus pula menjangka untuk mengurangkan bilangan pekerja mereka, menghasilkan imbalan bersih sebanyak + 8.8 peratus bagi suku tahun rujukan. (Paparan III)

IMBALAN BERSIH

Perbezaan di antara peratus pertubuhan yang memberi respons menggalakkan dan kurang menggalakkan dikenali sebagai **imbalan bersih**.

Paparan III: Jangkaan Imbalan Bersih Hasil Kasar dan Bilangan Pekerja, 2020-2023



Imbalan Bersih

Meningkat

Sama

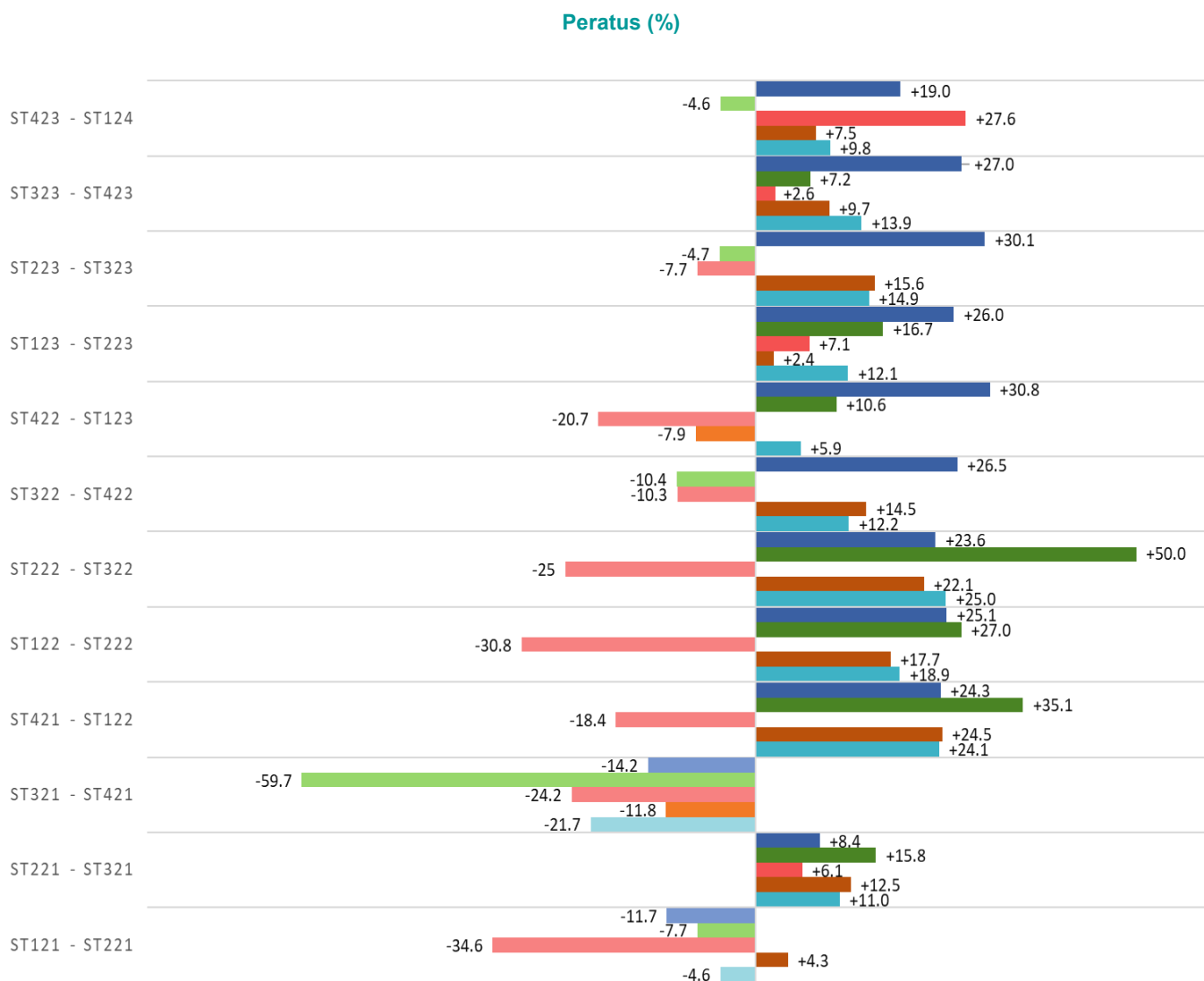
Merosot

JANGKAAN PRESTASI PERNIAGAAN BAGI OKTOBER 2023 HINGGA MAC 2024

Melihat ke hadapan, unjuran perniagaan bagi tempoh Oktober 2023 hingga Mac 2024 dijangka kekal rancak walaupun menyederhana, dengan imbalan bersih +9.8 peratus berbanding +13.9 peratus yang dicatatkan sebelum ini, disokong oleh kesemua sektor yang kekal positif kecuali Perdagangan Borong & Runcit. Sentimen dalam sektor Perkhidmatan merekodkan nilai positif, dengan imbalan bersih +19.0 peratus. Bagi enam bulan mendatang, kesemua subsektor di bawah sektor Perkhidmatan menjangkakan persekitaran perniagaan yang positif. Sektor Industri juga meramalkan prospek perniagaan yang lebih cerah, dengan imbalan bersih +7.5 peratus bagi tempoh Oktober 2023 hingga Mac 2024. Selepas melonjak ke trajektori positif untuk separuh kedua tahun 2023, sektor Pembinaan terus meningkat dengan ketara, dengan imbalan bersih +27.6 peratus untuk enam bulan akan datang. (Paparannya IV)

Sektor Perdagangan Borong & Runcit menjangkakan prospek perniagaan yang mencabar untuk enam bulan berikutnya dengan imbalan bersih sebanyak -4.6 peratus. Senario ini disebabkan oleh sentimen yang pesimis daripada subsektor Perdagangan Borong. Namun begitu, subsektor Perdagangan Runcit melonjak semula ke trajektori positif dengan mencatat +3.0 peratus bagi jangkaan 6 bulan ke hadapan berbanding -12.4 peratus yang direkodkan sebelum ini.

Paparan IV: Imbalan Bersih Jangkaan Prestasi Perniagaan bagi Enam Bulan Akan Datang mengikut Sektor, Malaysia, 2021-2023



Keseluruhan



Industri



Pembinaan



Perdagangan Borong & Runcit



Perkhidmatan

SUMMARY OF FINDINGS

BUSINESS TENDENCY STATISTICS, FOURTH QUARTER 2023

Business Tendency Statistics presents the expectations of business performance for the upcoming three and six months. The statistics are based on the Business Tendency Survey which is conducted on a quarterly basis.

This report provides the business performance expectations for the fourth quarter of 2023 and the upcoming six months period from October 2023 to March 2024.

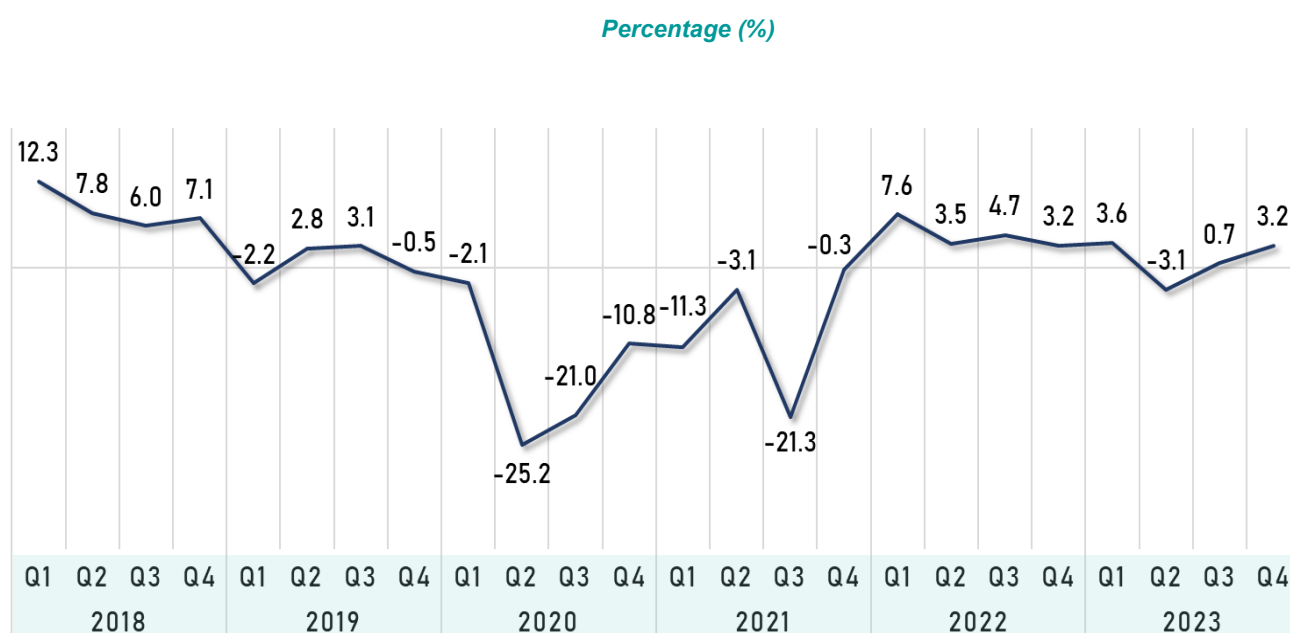
FORECAST OF BUSINESS PERFORMANCE FOR THE FOURTH QUARTER 2023

Businesses anticipate a better business situation in the fourth quarter of 2023, with a positive confidence indicator of 3.2 per cent, up from 0.7 per cent in the third quarter of 2023. (Exhibit I)

CONFIDENCE INDICATOR

Confidence indicator is a short-term indicator which summarises the overall views of business situation in various sectors in Malaysia. The confidence indicator is computed as the average of the net balance for selected variables.

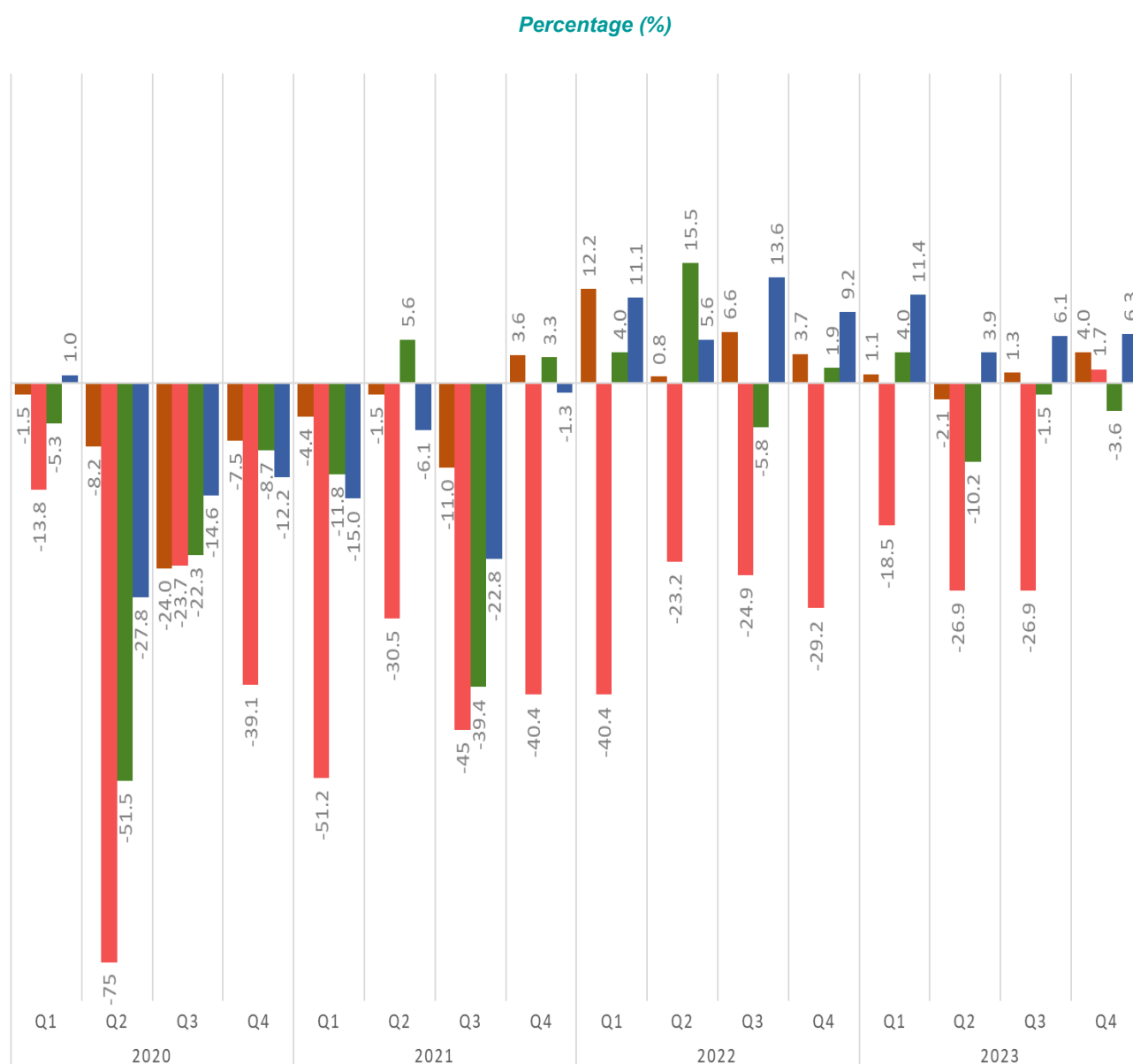
 **Exhibit I: Quarterly Confidence Indicator, Malaysia, 2018-2023**



Services, Industry, and Construction are the three sectors that anticipate better business conditions in the fourth quarter of 2023. The business confidence for Services sector remains on a positive trajectory, with the confidence indicator increasing to +6.3 per cent as against +6.1 per cent in the last quarter. Meanwhile, Industry sector continues to be optimistic about business performance, with a confidence indicator of +4.0 per cent for the corresponding quarter as compared to +1.3 per cent in the third quarter of 2023. Simultaneously, sentiments within Construction sector upturn to a positive trajectory for the first time since the first quarter of 2018 by posting +1.7 per cent as against -26.9 per cent in the third quarter of 2023.

However, businesses within the Wholesale & Retail Trade sector expect pessimistic business outlook, with a confidence indicator of -3.6 per cent in the fourth quarter of 2023 as opposed to -1.5 per cent in the last quarter. (Exhibit II)

Exhibit II: Quarterly Confidence Indicator by Sector, Malaysia, 2020-2023



Industry



Construction



Services



Wholesale & Retail Trade

Expectations of Gross Revenue and Number of Employees

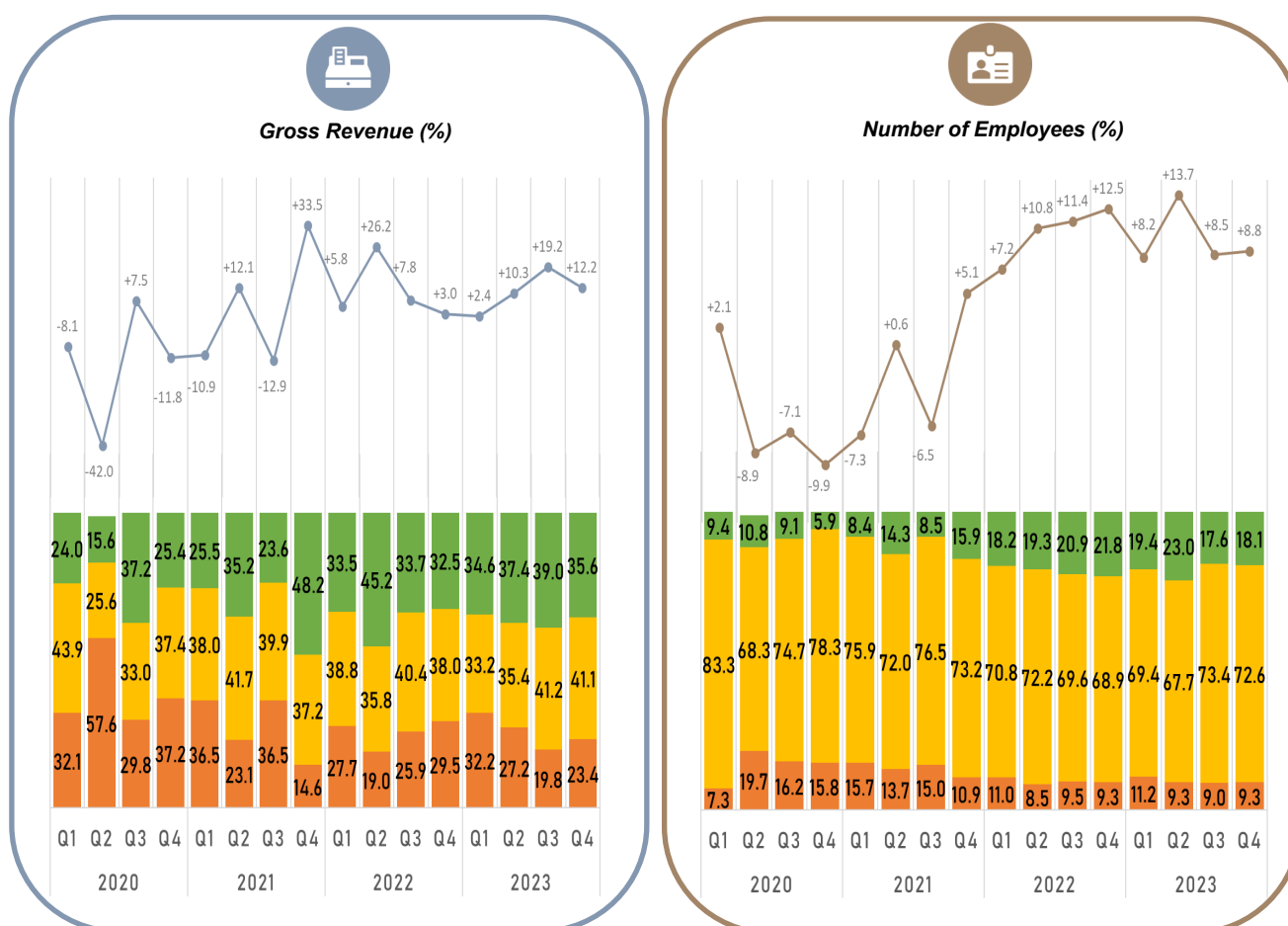
A total of 35.6 per cent of respondents expect their gross revenue to increase in the fourth quarter of 2023, while 23.4 per cent expect it to decline, resulting in a net balance of +12.2 per cent. Concurrently, 41.1 per cent of respondents anticipate a stagnation in their gross revenue.

In terms of employment, 72.6 per cent of businesses expect to keep their employees through the fourth quarter of 2023. Around 18.1 per cent of respondents expect to hire more, while 9.3 per cent expect to reduce their numbers, resulting in a net balance of +8.8 per cent for the reference quarter. (Exhibit III)

NET BALANCE

The difference between the percentages of establishments responded favourable and unfavourable response known as **net balance**.

Exhibit III: Expected of Net Balance Gross Revenue and Number of Employees, 2020-2023



Net Balance

Higher

Same

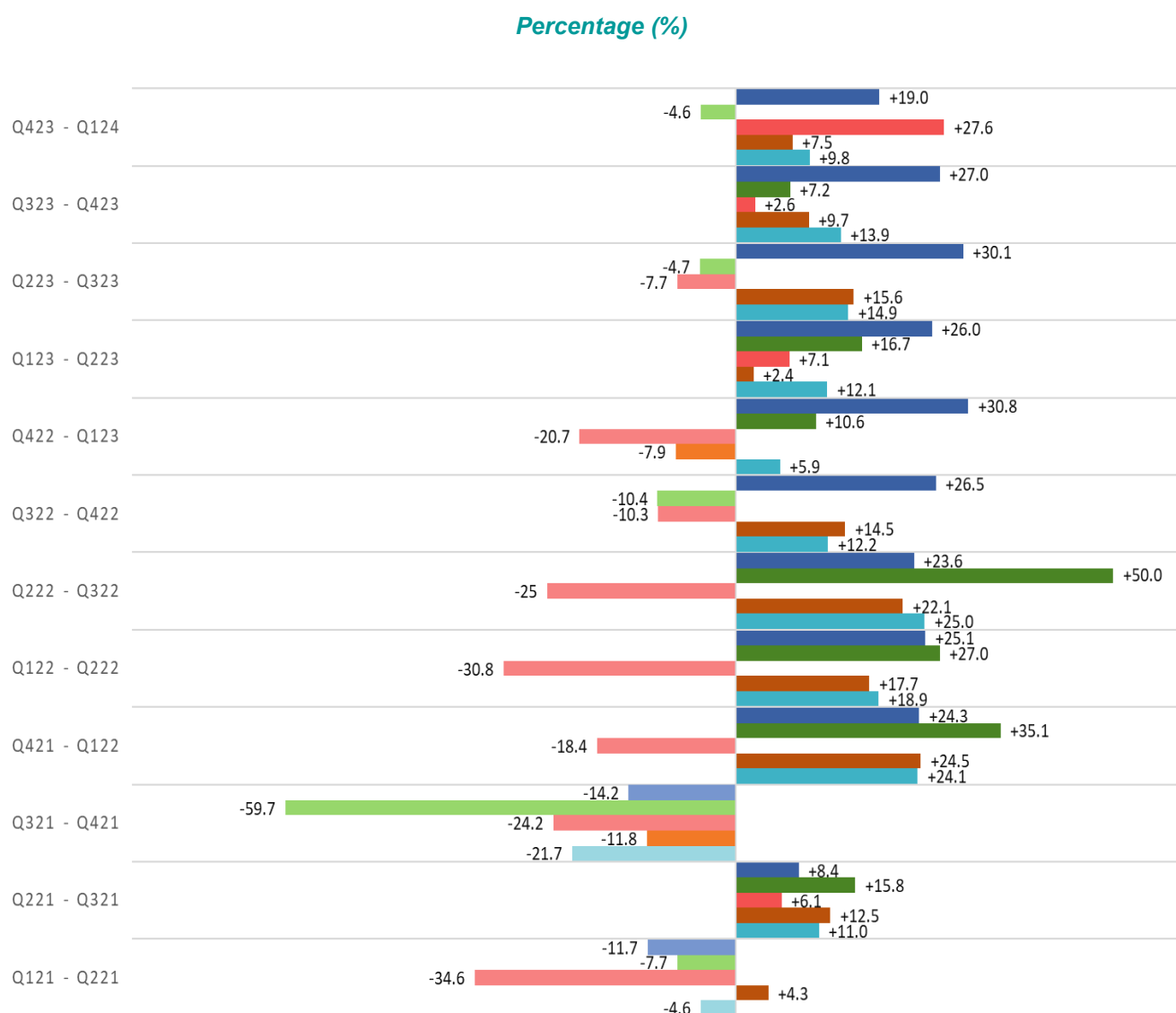
Lower

EXPECTATIONS OF BUSINESS PERFORMANCE IN OCTOBER 2023 TO MARCH 2024

Looking ahead, the business outlook for the period of October 2023 until March 2024 remain upbeat despite moderating, with a net balance of +9.8 per cent as against +13.9 per cent recorded previously, with all sectors register positively except the Wholesale & Retail Trade. Sentiments in Services sector remain positive, with a net balance of +19.0 per cent. For the next six months, all sub-sectors under Services sector anticipate a positive business environment. Industry sector also foresees a brighter business outlook, with a net balance of +7.5 per cent for the period of October 2023 until March 2024. After soaring to a positive trajectory for the second half of 2023, the Construction sector keeps improving significantly, with a net balance of +27.6 per cent for the upcoming six months. (Exhibit IV)

Wholesale & Retail Trade expects a challenging business outlook for the following six months with a net balance of -4.6 per cent. This scenario is due to the pessimist sentiment from the Wholesale Trade sub-sector. Nevertheless, Retail Trade subsector rebounded to a positive trajectory by recording +3.0 percent for the expected 6 months ahead compared to -12.4 percent recorded previously.

 **Exhibit IV: Malaysia, 2021-2023**
Net Balance of Business Performance Expectation for Upcoming Six Month by Sector,



01

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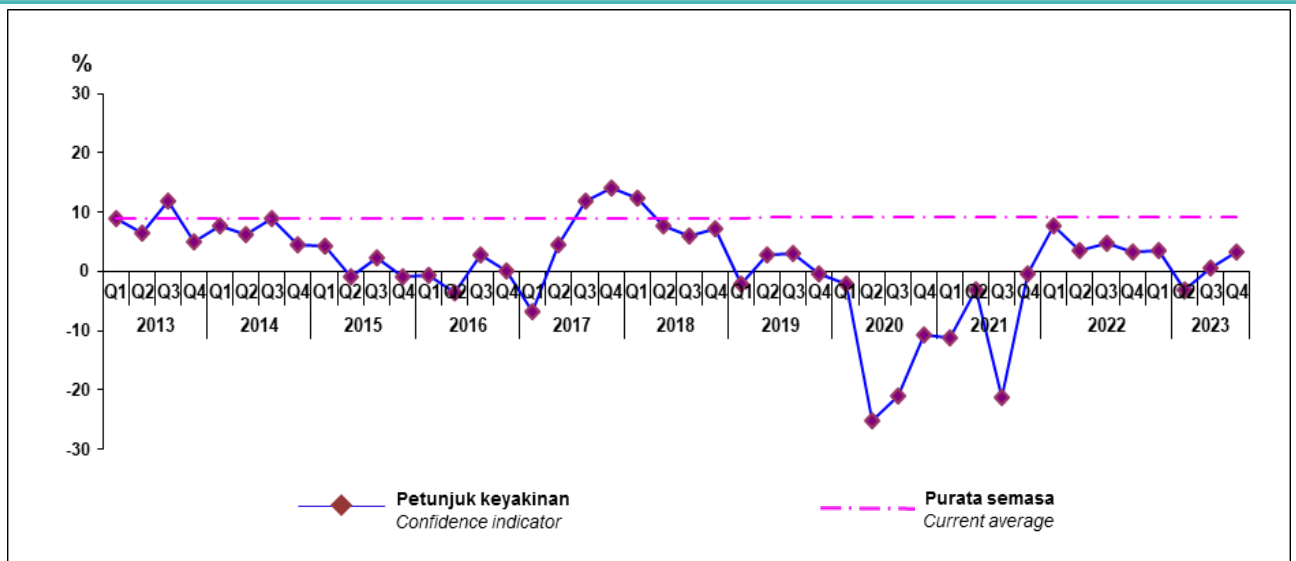
NOTA TEKNIKAL
TECHNICAL NOTES

CARTA/ CHARTS



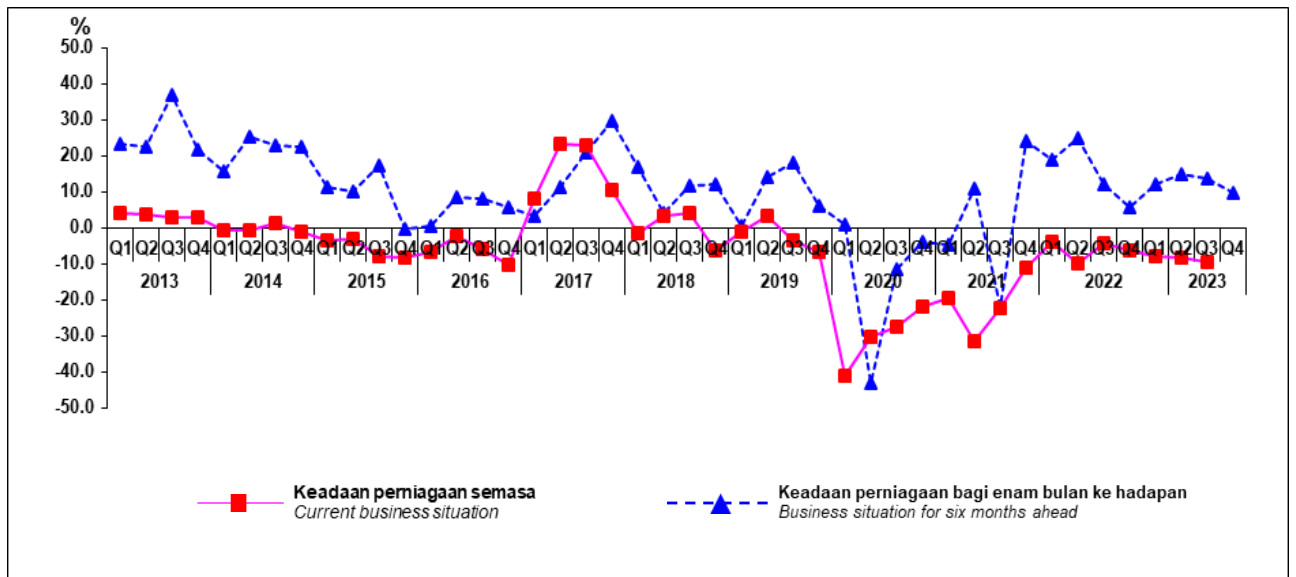
Carta 1: Petunjuk keyakinan suku tahunan, Malaysia, 2013–2023

Chart 1: Quarterly confidence indicator, Malaysia, 2013–2023



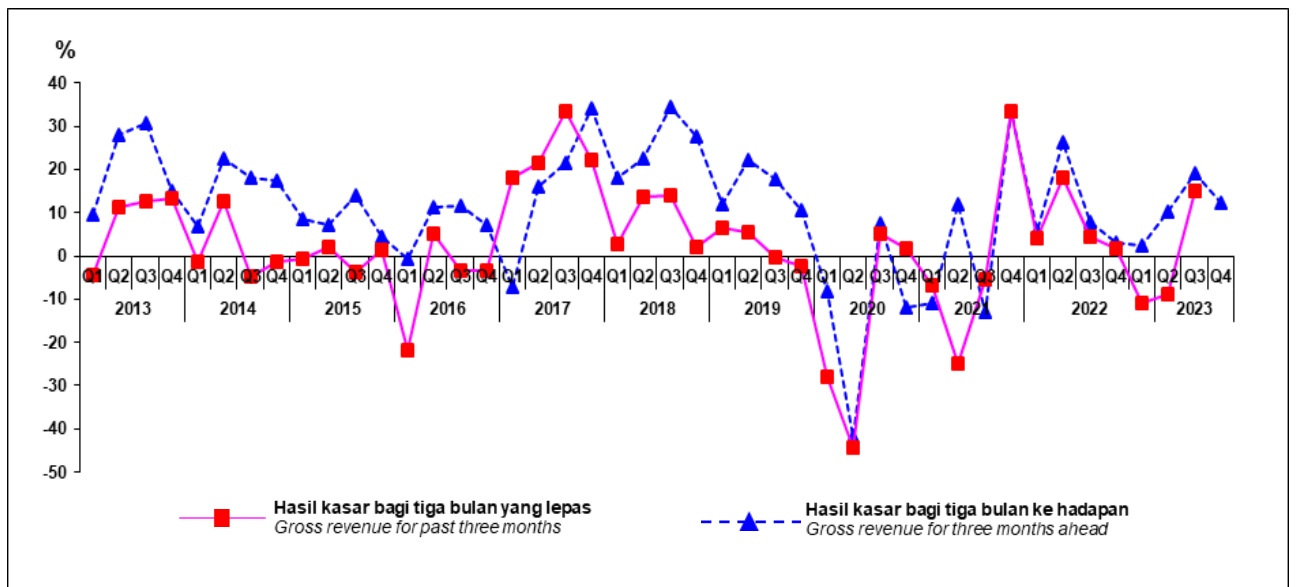
Carta 2: Imbangan bersih bagi keadaan perniagaan suku tahunan, Malaysia, 2013–2023

Chart 2: Quarterly net balance of business situation, Malaysia, 2013–2023



Carta 3: Imbangan bersih bagi hasil kasar suku tahunan, Malaysia, 2013–2023

Chart 3: Quarterly net balance of gross revenue, Malaysia, 2013–2023



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Jadual 1.1: Hasil kasar dan bilangan pekerja bagi suku tahun ketiga 2023
Table 1.1: Gross revenue and number of employees for third quarter 2023

(Peratus/Per cent)											
SEKTOR	HASIL KASAR GROSS REVENUE				BILANGAN PEKERJA NUMBER OF EMPLOYEES				SECTOR		
	IMBANGAN BERSIH NET BALANCE		NAIK UP	SAMA SAME	TURUN DOWN	IMBANGAN BERSIH NET BALANCE		NAIK UP		SAMA SAME	TURUN DOWN
Industri											
Pertanian											
Perombongan											
Pembuatan											
Elektrik dan air											
Pembinaan											
Perdagangan borong dan runcit											
Perdagangan borong											
Perdagangan runcit											
Perkhidmatan											
Penginapan											
Pengangkutan dan penyimpanan											
Komunikasi											
Kewangan											
Insurans											
Hartanah											
Teknologi maklumat dan komunikasi											
Makanan dan minuman											
Pentadbiran dan khidmat sokongan											
Profesional											
Kesihatan											
Pendidikan											
Perkhidmatan lain											
Semua sektor											

Jadual 1.2: Jangkaan hasil kasar dan bilangan pekerja bagi suku tahun keempat 2023
Table 1.2: Expectation of the gross revenue and number of employees for fourth quarter 2023

(Peratus/Per cent)

SEKTOR	HASIL KASAR GROSS REVENUE			BILANGAN PEKERJA NUMBER OF EMPLOYEES						SECTOR						
	IMBANGAN BERSIH NET BALANCE			IMBANGAN BERSIH NET BALANCE			NAIK UP				SAMA SAME			TURUN DOWN		
		NAIK UP	SAMA SAME	TURUN DOWN		IMBANGAN BERSIH NET BALANCE	NAIK UP	SAMA SAME	TURUN DOWN			IMBANGAN BERSIH NET BALANCE	NAIK UP	SAMA SAME	TURUN DOWN	
Industri	+14.4	38.1	38.2	23.7	+1.7	15.0	71.8	13.2	Industry							
Pertanian	+16.3	32.6	51.2	16.3	-4.7	9.3	76.7	14.0	Agriculture							
Perombongan	+18.5	37.0	44.4	18.5	+18.5	25.9	66.7	7.4	Mining							
Pembuatan	+11.2	40.0	31.2	28.8	-4.0	12.0	72.0	16.0	Manufacturing							
Elektrik dan air	+21.4	42.9	35.7	21.4	+14.3	21.4	71.4	7.1	Electricity and water							
Pembinaan	+17.2	27.6	62.1	10.3	+13.8	17.2	79.3	3.4	Construction							
Perdagangan borong dan runcit	-5.7	21.8	50.6	27.6	+5.8	7.0	91.9	1.2	Wholesale and retail trade							
Perdagangan borong	-13.8	19.0	48.3	32.8	+1.8	3.5	94.7	1.8	Wholesale trade							
Perdagangan runcit	+10.3	27.6	55.2	17.2	+13.8	13.8	86.2	0.0	Retail trade							
Perkhidmatan	+18.7	41.2	36.2	22.6	+21.4	30.3	60.9	8.9	Services							
Penginapan	+60.6	66.7	27.3	6.1	+21.2	24.2	72.7	3.0	Accommodation							
Pengangkutan dan penyimpanan	+6.9	27.6	51.7	20.7	+10.3	17.2	75.9	6.9	Transportation and storage							
Komunikasi	+21.4	35.7	50.0	14.3	+21.4	42.9	35.7	21.4	Communications							
Kewangan	+4.8	38.1	28.6	33.3	+14.3	19.0	76.2	4.8	Finance							
Insurans	0.0	50.0	0.0	50.0	+50.0	66.7	16.7	16.7	Insurance							
Hartanah	+15.0	35.0	45.0	20.0	+15.8	15.8	84.2	0.0	Real estate							
Teknologi maklumat dan komunikasi	+18.2	36.4	45.5	18.2	+18.2	27.3	63.6	9.1	Information and communications technology							
Makanan dan minuman	+13.3	46.7	20.0	33.3	+20.0	33.3	53.3	13.3	Food and beverage							
Pentadbiran dan khidmat sokongan	+55.6	66.7	22.2	11.1	+50.0	50.0	50.0	0.0	Administrative and support services							
Profesional	+50.0	62.5	25.0	12.5	+25.0	31.3	62.5	6.3	Professional							
Kesihatan	+47.8	52.2	43.5	4.3	+47.8	52.2	43.5	4.3	Health							
Pendidikan	+27.3	40.9	45.5	13.6	+31.8	36.4	59.1	4.5	Education							
Perkhidmatan lain	+19.0	28.6	61.9	9.5	+9.5	9.5	90.5	0.0	Other services							
Semua sektor	+12.2	35.6	41.1	23.4	+8.8	18.1	72.6	9.3	All sectors							

Jadual 1.3: Imbangan bersih semasa, jangkaan bagi hasil kasar dan bilangan pekerja
Table 1.3: Net balance of current, expectation for gross revenue and number of employees

(Peratus/Per cent)																					
SEKTOR	2021				2022				2023				SECTOR								
	Q4				Q1				Q2					Q3				Q4			
<u>Kecenderungan masa kini</u>																					
Hasil kasar																					
Industri	42.3				0.0	+21.9	-5.1	-11.6	-20.4	-15.0	21.8	-	Gross revenue								
Pembinaan	-50.0				-32.1	-39.2	-20.7	-21.5	-23.1	-12.9	17.2	-	Industry								
Perdagangan borong dan runcit	+27.0				+28.6	+13.4	+10.6	+7.6	+4.6	-16.7	-6.9	-	Construction								
Perkhidmatan	+38.4				+2.6	+25.2	+20.4	+24.7	-2.1	6.3	16.6	-	Wholesale and retail trade								
Semua sektor	+33.5				+4.1	+18.0	+4.3	+1.8	-10.8	-9.0	14.9	-	Services								
Bilangan pekerja													All sectors								
Industri	-3.3				-11.5	-5.8	+8.0	+6.6	-1.2	+10.6	+5.5	-	Number of employees								
Pembinaan	-50.0				-28.5	-27.6	-20.7	-3.6	-3.9	-17.9	+10.3	-	Industry								
Perdagangan borong dan runcit	-8.1				0.0	-4.5	+4.6	+6.0	+4.7	+3.1	+4.7	-	Construction								
Perkhidmatan	+1.4				-0.3	+2.3	+14.3	+9.0	+16.4	+11.6	+4.8	-	Wholesale and retail trade								
Semua sektor	-5.3				-7.1	-4.4	+7.7	+6.7	+4.8	+8.0	+5.4	-	Services								
													All sectors								
<u>Kecenderungan masa depan</u>																					
Hasil kasar																					
Industri	+34.6				+2.9	+26.3	+7.4	-9.4	-8.3	+8.3	+18.9	+14.4	Gross revenue								
Pembinaan	-21.1				-42.4	-39.3	-3.4	-6.9	0.0	-19.2	-5.1	+17.2	Industry								
Perdagangan borong dan runcit	+45.9				+16.2	+50.0	-16.4	+6.0	+22.7	+10.9	+8.3	-5.7	Construction								
Perkhidmatan	+34.1				+12.8	+23.6	+25.5	+23.3	+8.1	+18.6	+30.7	+18.7	Wholesale and retail trade								
Semua sektor	+33.5				+5.8	+26.2	+7.8	+3.0	+2.4	+10.3	+19.2	+12.2	Services								
Bilangan pekerja													All sectors								
Industri	+4.1				+5.2	+12.5	+11.3	+12.5	+8.4	+11.4	+10.3	+1.7	Number of employees								
Pembinaan	-13.2				-27.0	-21.4	-3.5	-10.3	0.0	-7.7	-20.5	+13.8	Industry								
Perdagangan borong dan runcit	+5.4				+9.4	+10.0	-1.5	+4.5	0.0	+11.1	+1.0	+5.8	Construction								
Perkhidmatan	+9.9				+15.7	+14.5	+22.2	+21.8	+14.4	+23.0	+15.5	+21.4	Wholesale and retail trade								
Semua sektor	+5.1				+7.2	+10.8	+11.4	+12.5	+8.2	+13.7	+8.5	+8.8	Services								
													All sectors								

Jadual 1.4: Petunjuk keyakinan mengikut industri dan sektor

Table 1.4: Confidence indicator by industry and sector

(Peratus/Per cent)

SEKTOR	2021				2022				2023				SECTOR	
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3		Q4
Industri	+3.6	+12.2	+0.8	+6.6	+3.7	+1.1	-2.1	+1.3	+4.0					Industry
Pertanian	+9.2	+7.2	-7.2	+4.5	+12.4	-1.2	-1.2	+16.7	-21.0					Agriculture
Perlombongan	-0.6	+7.1	-5.8	+12.3	+8.4	+21.9	+2.7	+7.9	+17.6					Mining
Pembuatan	+2.2	+18.7	+3.8	+1.9	-1.7	-6.8	-6.7	-6.6	+7.6					Manufacturing
Elektrik dan air	+11.0	-9.2	+23.0	+33.0	+5.9	+6.1	+17.4	-0.9	+7.1					Electricity and water
Pembinaan	-40.4	-40.4	-23.2	-24.9	-29.2	-18.5	-26.9	-26.9	+1.7					Construction
Perdagangan borong dan runcit	+3.3	+4.0	+15.5	-5.8	+1.9	+4.0	-10.2	-1.5	-3.6					Wholesale and retail trade
Perdagangan borong	+1.6	+1.3	+10.6	-8.0	-6.9	+8.0	-11.9	+1.8	-6.8					Wholesale trade
Perdagangan runcit	+5.9	+9.3	+24.9	-2.4	+19.7	-3.2	-6.8	-12.4	+3.0					Retail trade
Perkhidmatan	-1.3	+11.1	+5.6	+13.6	+9.2	+11.4	+3.9	+6.1	+6.3					Services
Penginapan	-30.6	+6.2	+13.6	+33.3	+36.2	+5.3	+8.0	+23.6	+34.3					Accommodation
Pengangkutan dan penyimpanan	+6.6	-6.7	-4.4	+13.7	+4.7	+10.0	+6.6	+22.2	+1.5					Transportation and storage
Komunikasi	+2.2	+13.3	+9.8	-8.3	-9.5	+6.7	-11.1	-22.2	-4.8					Communications
Kewangan	+2.8	+7.4	+2.1	+16.5	+3.3	+16.1	+7.0	+7.0	+10.5					Finance
Insurans	+23.6	+66.7	+47.2	+34.7	+54.3	+39.7	+22.2	+29.5	+25.0					Insurance
Hartanah	-32.2	+0.4	-1.5	+4.8	-6.5	0.0	+0.4	+0.4	+0.6					Real estate
Teknologi maklumat dan komunikasi	-2.4	+14.1	-2.7	+20.0	-6.4	+4.1	-17.2	-19.4	-3.0					Information and communications technology
Makanan dan minuman	+14.0	+53.7	+9.8	+33.3	+23.5	+17.6	+3.9	+2.4	-22.2					Food and beverage
Pentadbiran dan khidmat sokongan	-24.1	-5.6	-11.1	+13.3	+11.1	+2.0	+39.2	+22.2	+29.6					Administrative and support services
Profesional	-11.9	-8.3	0.0	+4.8	+13.3	-2.4	-5.2	+10.9	+14.6					Professional
Kesihatan	+1.8	+8.3	+1.9	+43.3	+52.1	+33.3	+37.0	+45.1	+53.6					Health
Pendidikan	-25.9	-5.3	+2.1	+11.7	0.0	+7.0	+3.2	+37.0	+16.7					Education
Perkhidmatan lain	-13.6	-20.6	+13.0	-1.8	+18.3	+6.3	+1.8	-14.0	+7.9					Other services
Semua sektor	-0.3	+7.6	+3.5	+4.7	+3.2	+3.6	-3.1	+0.7	+3.2					All sectors

Jadual 2.1: Imbangan bersih bagi statistik industri pertanian
Table 2.1: Net balance of statistics for agriculture industry

IMBANGAN BERSIH NET BALANCE											(Peratus/Per cent)			
PETUNJUK STATISTIK	2021				2022				2023				STATISTICAL INDICATORS	
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3		Q4
Hasil kasar														Gross Revenue
Kecenderungan masa kini	+42.6	0.0	+34.1	-17.1	-7.9	-31.4	+17.3	-2.3	-					Present tendency
Kecenderungan masa depan	+13.6	-14.9	+28.6	+2.4	-19.5	-18.4	+28.6	+19.2	+7.0					Future tendency
Bilangan pekerja														Number of employees
Kecenderungan masa kini	-14.9	-33.3	-31.7	+9.8	+7.9	+8.6	+25.0	+7.0	-					Present tendency
Kecenderungan masa depan	-6.8	+6.4	-14.3	+7.3	+24.4	+13.2	+11.4	+13.5	-4.7					Future tendency
Jumlah pengeluaran														Volume of production
Kecenderungan masa kini	+2.1	-31.0	+14.6	-17.1	-13.2	-31.4	+15.4	+18.6	-					Present tendency
Kecenderungan masa depan	-2.3	-10.6	0.0	+4.9	+7.3	-7.9	+34.3	+34.6	+23.3					Future tendency
Jumlah tempahan bagi pasaran tempatan														Volume of orders for domestic market
Kecenderungan masa kini	+26.7	-12.2	+15.8	+12.8	0.0	0.0	+24.5	-17.5	-					Present tendency
Kecenderungan masa depan	+24.4	0.0	+24.4	+7.9	+28.2	-9.1	+26.5	+18.4	-2.5					Future tendency
Purata harga jualan bagi pasaran tempatan														Average selling price for domestic market
Kecenderungan masa kini	+56.5	+33.3	+15.0	-17.5	-21.1	-2.9	-33.3	-28.6	-					Present tendency
Kecenderungan masa depan	+25.0	-15.2	+11.9	-25.0	0.0	-10.5	+17.1	-17.6	-19.0					Future tendency
Jumlah tempahan bagi pasaran eksport														Volume of orders for export market
Kecenderungan masa kini	-11.5	+4.8	-9.5	0.0	-16.7	-15.0	+12.0	-40.9	-					Present tendency
Kecenderungan masa depan	-10.0	-11.5	+4.8	-30.0	-27.8	-11.1	+5.0	+4.0	-18.2					Future tendency
Purata harga jualan bagi pasaran eksport														Average selling price for export market
Kecenderungan masa kini	+29.2	+35.0	+15.0	-33.3	-16.7	-10.5	-8.0	-31.8	-					Present tendency
Kecenderungan masa depan	+5.0	-4.2	+20.0	+5.0	-38.9	-11.1	-10.0	-4.0	-22.7					Future tendency
Kedadaan kewangan semasa	+8.5	+7.1	-7.3	0.0	+5.3	+2.9	+3.8	-9.3	-					Current financial situation
Kedadaan perolehan kredit semasa	-4.3	-9.5	-12.2	-9.8	+2.6	-5.7	-5.8	-9.3	-					Current situation concerning access to credit
Petunjuk keyakinan (PK)	+9.2	+7.2	-7.2	+4.5	+12.4	-1.2	-1.2	+16.7	-21.0					Confidence indicator (CI)

(Peratus/Per cent)

Jadual 2.2: Imbangan bersih bagi statistik industri perlombongan
Table 2.2: Net balance of statistics for mining industry

IMBANGAN BERSIH NET BALANCE										STATISTICAL INDICATORS
2021		2022			2023					
Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
PETUNJUK STATISTIK										

(Peratus/Per cent)

Jadual 2.3: Imbangan bersih bagi statistik industri pembuatan
Table 2.3: Net balance of statistics for manufacturing industry

(Peratus/Per cent)											
IMBANGAN BERSIH NET BALANCE											
2021				2022				2023			
Q4				Q1		Q2		Q3		Q4	
STATISTICAL INDICATORS											
PETUNJUK STATISTIK											
Hasil kasar											
Kecenderungan masa kini											
Kecenderungan masa depan											
Bilangan pekerja											
Kecenderungan masa kini											
Kecenderungan masa depan											
Jumlah pengeluaran											
Kecenderungan masa kini											
Kecenderungan masa depan											
Jumlah tempahan bagi pasaran tempatan											
Kecenderungan masa kini											
Kecenderungan masa depan											
Purata harga jualan bagi pasaran tempatan											
Kecenderungan masa kini											
Kecenderungan masa depan											
Jumlah tempahan bagi pasaran eksport											
Kecenderungan masa kini											
Kecenderungan masa depan											
Purata harga jualan bagi pasaran eksport											
Kecenderungan masa kini											
Kecenderungan masa depan											
Stok barangan siap pada akhir tempoh											
Kecenderungan masa kini											
Kecenderungan masa depan											
Keadaan kewangan semasa											
Keadaan perolehan kredit semasa											
Petunjuk keyakinan (PK)											

Jadual 2.4: Imbangan bersih bagi statistik industri elektrik dan air
Table 2.4: Net balance of statistics for electricity and water industry

(Peratus/Per cent)														
PETUNJUK STATISTIK	IMBANGAN BERSIH NET BALANCE										STATISTICAL INDICATORS			
	2021				2022				2023					
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1		Q2	Q3	Q4
Hasil kasar														Gross Revenue
Kecenderungan masa kini	-11.8	-16.7	+22.2	+5.6	-11.8	+5.6	0.0	+14.3	-					Present tendency
Kecenderungan masa depan	+36.8	+17.6	+22.2	+5.6	0.0	+5.9	0.0	+21.4						Future tendency
Bilangan pekerja														Number of employees
Kecenderungan masa kini	-11.8	0.0	-5.6	-11.1	0.0	0.0	+5.3	0.0	-					Present tendency
Kecenderungan masa depan	+5.3	-11.8	+16.7	+22.2	0.0	+5.9	+22.2	+15.8	+14.3					Future tendency
Jumlah pengeluaran														Volume of production
Kecenderungan masa kini	+11.8	+22.2	+33.3	+11.1	+5.9	+22.2	+31.6	+14.3	-					Present tendency
Kecenderungan masa depan	+31.6	+11.8	+44.4	+16.7	0.0	-5.9	+16.7	+15.8	+21.4					Future tendency
Jumlah tempahan														Volume of orders
Kecenderungan masa kini	-6.7	+29.4	+43.8	+11.8	+6.3	+12.5	-17.6	0.0	-					Present tendency
Kecenderungan masa depan	+27.8	+6.7	+47.1	+25.0	+5.9	+12.5	0.0	-11.8	+15.4					Future tendency
Purata harga jualan														Average selling price
Kecenderungan masa kini	-17.6	0.0	+5.6	+5.6	+17.6	+16.7	-26.3	0.0	-					Present tendency
Kecenderungan masa depan	+5.3	+11.8	0.0	-11.1	+11.1	0.0	0.0	-10.5	-7.1					Future tendency
Kecadaan kewangan semasa	0.0	+11.1	0.0	+11.1	+5.9	+27.8	+10.5	+21.4	-					Current financial situation
Kecadaan perolehan kredit semasa	+5.9	+5.6	-11.1	+11.1	0.0	+5.6	-5.3	-7.1	-					Current situation concerning access to credit
Petunjuk keyakinan (PK)	+11.0	-9.2	+23.0	+33.0	+5.9	+6.1	+17.4	-0.9	+7.1					Confidence indicator (CI)

(Peratus/Per cent)

Jadual 3.1: Imbangan bersih bagi statistik sektor pembinaan
Table 3.1: Net balance of statistics for construction sector

IMBANGAN BERSIH NET BALANCE												(Peratus/Per cent)		
PETUNJUK STATISTIK	2021				2022				2023				STATISTICAL INDICATORS	
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3		Q4
Hasil kasar														Gross Revenue
Kecenderungan masa kini	-50.0	-32.1	-39.3	-20.7	-21.4	-23.1	-12.8	+17.2	-					Present tendency
Kecenderungan masa depan	-21.1	-42.3	-39.3	-3.4	-6.9	0.0	-19.2	-5.1	+17.2					Future tendency
Bilangan pekerja														Number of employees
Kecenderungan masa kini	-50.0	-28.6	-27.6	-20.7	-3.6	-3.8	-17.9	+10.3	-					Present tendency
Kecenderungan masa depan	-13.2	-26.9	-21.4	-3.4	-10.3	0.0	-7.7	-20.5	+13.8					Future tendency
Purata harga jualan														Average selling price
Kecenderungan masa kini	-50.0	-19.2	-23.1	-29.6	-20.8	-13.0	-25.0	+12.0	-					Present tendency
Kecenderungan masa depan	0.0	-36.4	+10.7	-3.7	-7.4	0.0	-13.0	-8.3	+20.0					Future tendency
Aktiviti pembinaan														Construction activity
Kecenderungan masa kini	-50.0	-28.6	-42.9	-41.4	-25.0	-44.0	-20.5	-10.3	-					Present tendency
Kecenderungan masa depan	-27.0	-34.6	-35.7	-17.2	-3.4	-3.6	-24.0	-10.3	+3.4					Future tendency
Jumlah tempahan (kontrak)														Volume of orders (contracts)
Kecenderungan masa kini	-53.8	-25.0	-46.4	-48.1	-37.0	-46.2	-33.3	-10.3	-					Present tendency
Kecenderungan masa depan	-24.3	-38.5	-39.3	-13.8	-29.6	-11.1	-19.2	-23.1	+13.8					Future tendency
Kapasiti teknikal														Technical capacity
Kecenderungan masa kini	-32.0	-14.8	-28.6	-18.5	-3.7	-12.0	-13.9	0.0	-					Present tendency
Kecenderungan masa depan	-22.2	-36.0	-29.6	-10.3	-11.1	+3.7	+4.0	-11.1	+17.9					Future tendency
Kedadaan kewangan semasa	-53.8	-42.9	-34.5	-24.1	-35.7	-30.8	-33.3	-24.1	-					Current financial situation
Kedadaan perolehan kredit semasa	-38.5	-39.3	-31.0	-34.5	-21.4	-30.8	-33.3	-27.6	-					Current situation concerning access to credit
Petunjuk keyakinan (PK)	-40.4	-40.4	-23.2	-24.9	-29.2	-18.5	-26.9	-26.9	+1.7					Confidence indicator (CI)

Jadual 4.1: Imbangan bersih bagi statistik industri perdagangan borong
Table 4.1: Net balance of statistics for wholesale trade industry

IMBANGAN BERSIH										STATISTICAL INDICATORS
NET BALANCE										
PETUNJUK STATISTIK	2022				2023					
	2021									
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Hasil kasar										Gross Revenue
Kecenderungan masa kini	+18.4	+19.6	+2.4	-4.5	+4.8	-4.5	-14.9	-10.3	-	Present tendency
Kecenderungan masa depan	+47.8	+8.2	+50.0	-19.5	-18.2	+14.3	+6.8	+13.5	-13.8	Future tendency
Bilangan pekerja										Number of employees
Kecenderungan masa kini	-12.2	+2.2	+12.2	-6.8	+7.1	+6.8	+8.1	+1.8	-	Present tendency
Kecenderungan masa depan	+4.3	0.0	+8.7	-2.4	-6.8	0.0	+9.3	+1.4	+1.8	Future tendency
Purata harga jualan										Average selling price
Kecenderungan masa kini	+20.4	+35.6	+41.5	+15.9	+19.0	+16.3	+1.4	-1.7	-	Present tendency
Kecenderungan masa depan	+15.2	+26.5	+31.1	+24.4	-6.8	+14.3	+9.3	-16.9	-5.2	Future tendency
Jumlah jualan										Volume of sales
Kecenderungan masa kini	+16.3	+13.3	0.0	-11.4	0.0	-4.7	-16.9	-12.1	-	Present tendency
Kecenderungan masa depan	+45.7	-6.1	+48.9	-17.1	-9.1	+16.7	+2.3	+15.5	-12.1	Future tendency
Jumlah tempahan dengan pembekal										Volume of orders placed with suppliers
Kecenderungan masa kini	+8.5	+6.7	0.0	0.0	+7.3	+2.4	-8.5	-1.8	-	Present tendency
Kecenderungan masa depan	+26.7	-4.3	+15.6	-15.0	-25.0	+4.9	-4.8	+9.9	-14.5	Future tendency
Stok barangan pada akhir tempoh										Stock of goods as at end of period
Kecenderungan masa kini	+4.3	+18.2	-7.7	+2.4	-9.8	+22.0	+1.5	-24.5	-	Present tendency
Kecenderungan masa depan	+6.8	+15.2	-4.5	-25.6	-11.9	0.0	+7.3	+4.4	0.0	Future tendency
Persaingan dalam aktiviti jual borong										Competition in wholesale activity
Kecenderungan masa kini	+22.9	+28.3	+50.0	+46.5	+45.2	+40.5	+37.1	+32.1	-	Present tendency
Kecenderungan masa depan	+35.6	+18.8	+26.1	+45.0	+39.5	+47.6	+40.5	+31.4	+25.0	Future tendency
Kedadaan kewangan semasa	-16.3	-8.7	-29.3	-13.6	-2.4	-9.1	+2.7	-15.5	-	Current financial situation
Kedadaan perolehan kredit semasa	-14.3	-15.2	-4.9	-18.2	0.0	-2.3	-1.4	-12.1	-	Current situation concerning access to credit
Petunjuk keyakinan (PK)	+1.6	+1.3	+10.6	-8.0	-6.9	+8.0	-11.9	+1.8	-6.8	Confidence indicator (CI)

(Peratus/Per cent)

Jadual 4.2: Imbangan bersih bagi statistik industri perdagangan runcit
Table 4.2: Net balance of statistics for retail trade industry

IMBANGAN BERSIH NET BALANCE												(Peratus/Per cent)		
PETUNJUK STATISTIK	2021				2022				2023				STATISTICAL INDICATORS	
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3		Q4
Hasil kasar														Gross Revenue
Kecenderungan masa kini	+44.0	+45.8	+30.8	+40.9	+12.5	+25.0	-22.7	0.0	-					Present tendency
Kecenderungan masa depan	+42.9	+32.0	+50.0	-11.5	+54.5	+37.5	+20.0	-9.1	+10.3					Future tendency
Bilangan pekerja														Number of employees
Kecenderungan masa kini	0.0	-4.2	-30.8	+27.3	+4.2	0.0	-13.6	+10.3	-					Present tendency
Kecenderungan masa depan	+7.1	+28.0	+12.5	0.0	+27.3	0.0	+15.0	0.0	+13.8					Future tendency
Purata harga jualan														Average selling price
Kecenderungan masa kini	+41.7	+17.4	+44.0	+45.5	+17.4	+36.8	+5.0	+26.9	-					Present tendency
Kecenderungan masa depan	+14.8	+58.3	+40.9	+20.0	+45.5	+34.8	+26.3	+20.0	+11.5					Future tendency
Jumlah jualan														Volume of sales
Kecenderungan masa kini	+41.7	+30.4	+36.0	+45.5	+26.1	+10.5	-33.3	-14.3	-					Present tendency
Kecenderungan masa depan	+44.4	+41.7	+52.2	-4.0	+31.8	+34.8	+10.5	-9.5	0.0					Future tendency
Jumlah tempahan dengan pembekal														Volume of orders placed with suppliers
Kecenderungan masa kini	+37.5	+17.4	+24.0	+63.6	+34.8	+5.3	-33.3	-7.1	-					Present tendency
Kecenderungan masa depan	+44.4	+41.7	+17.4	-4.0	+38.1	+17.4	+15.8	-4.8	+3.6					Future tendency
Stok barangan pada akhir tempoh														Stock of goods as at end of period
Kecenderungan masa kini	0.0	+8.7	-12.0	+27.3	+30.4	+5.3	+19.0	+18.5	-					Present tendency
Kecenderungan masa depan	-33.3	+4.2	-8.7	-4.0	+18.2	+21.7	-10.5	0.0	+10.7					Future tendency
Persaingan dalam aktiviti jual runcit														Competition in retail activity
Kecenderungan masa kini	+33.3	+8.7	+33.3	+54.5	+47.8	+50.0	+57.1	+35.7	-					Present tendency
Kecenderungan masa depan	+70.4	+54.2	+17.4	+25.0	+50.0	+52.2	+44.4	+42.9	+32.1					Future tendency
Kedadaan kewangan semasa	-4.0	+16.7	-11.5	+45.5	+20.8	+10.0	+13.6	+27.6	-					Current financial situation
Kedadaan perolehan kredit semasa	+4.0	-12.5	0.0	+31.8	+8.3	0.0	+9.1	+17.2	-					Current situation concerning access to credit
Petunjuk keyakinan (PK)	+5.9	+9.3	+24.9	-2.4	+19.7	-3.2	-6.8	-12.4	+3.0					Confidence indicator (CI)

Jadual 5.1: Imbangan bersih bagi statistik industri penginapan
Table 5.1: Net balance of statistics for accommodation industry

(Peratus/Per cent)													
PETUNJUK STATISTIK	IMBANGAN BERSIH NET BALANCE								STATISTICAL INDICATORS				
	2021				2022					2023			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3		Q4	Q1	Q2	Q3
Hasil kasar										Gross Revenue			
Kecenderungan masa kini										Present tendency			
Kecenderungan masa depan										Future tendency			
Bilangan pekerja										Number of employees			
Kecenderungan masa kini										Present tendency			
Kecenderungan masa depan										Future tendency			
Purata bayaran bilik hotel										Average hotel room charges			
Kecenderungan masa kini										Present tendency			
Kecenderungan masa depan										Future tendency			
Jumlah permintaan										Volume of demand			
Kecenderungan masa kini										Present tendency			
Kecenderungan masa depan										Future tendency			
Keadaan kewangan semasa										Current financial situation			
Keadaan perolehan kredit semasa										Current situation concerning access to credit			
Petunjuk keyakinan (PK)										Confidence indicator (CI)			

(Peratus/Per cent)

Jadual 5.2: Imbangan bersih bagi statistik industri pengangkutan dan penyimpanan
Table 5.2: Net balance of statistics for transportation and storage industry

IMBANGAN BERSIH NET BALANCE												(Peratus/Per cent)		
PETUNJUK STATISTIK	2021				2022				2023				STATISTICAL INDICATORS	
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3		Q4
Hasil kasar														Gross Revenue
Kecenderungan masa kini	+36.0	0.0	+4.3	+39.1	0.0	-11.1	+25.8	+31.0	-					Present tendency
Kecenderungan masa depan	+48.1	+16.0	+8.7	+47.8	-4.3	+25.0	+40.7	+35.5	+6.9					Future tendency
Bilangan pekerja														Number of employees
Kecenderungan masa kini	-4.0	0.0	-13.0	+13.0	+8.3	-7.4	+12.9	+6.9	-					Present tendency
Kecenderungan masa depan	+14.8	0.0	+8.7	+34.8	+17.4	+29.2	+40.7	+16.1	+10.3					Future tendency
Purata harga jualan														Average selling price
Kecenderungan masa kini	+14.3	0.0	0.0	+36.4	+16.7	+8.7	+10.3	+3.8	-					Present tendency
Kecenderungan masa depan	+20.8	+19.0	0.0	+21.1	+22.7	+5.6	+17.4	+17.2	+15.4					Future tendency
Jumlah permintaan														Volume of demand
Kecenderungan masa kini	+13.0	-4.5	+4.8	+27.3	-10.0	-16.0	+26.7	+11.1	-					Present tendency
Kecenderungan masa depan	+30.8	-13.0	0.0	+57.1	-4.5	+40.0	+32.0	+33.3	+3.7					Future tendency
Kedadaan kewangan semasa	-12.0	-13.0	+13.0	+13.0	+8.3	+14.8	+12.9	+6.9	-					Current financial situation
Kedadaan perolehan kredit semasa	-16.0	-21.7	-13.0	-13.0	-8.3	-3.7	0.0	-13.8	-					Current situation concerning access to credit
Petunjuk keyakinan (PK)	+6.6	-6.7	-4.4	+13.7	+4.7	+10.0	+6.6	+22.2	+1.5					Confidence indicator (CI)

Jadual 5.3: Imbangan bersih bagi statistik industri komunikasi
Table 5.3: Net balance of statistics for communications industry

IMBANGAN BERSIH NET BALANCE										STATISTICAL INDICATORS	
2021				2022				2023			
Q4				Q1		Q2		Q3			Q4
PETUNJUK STATISTIK											
Hasil kasar											
Kecenderungan masa kini											
Kecenderungan masa depan											
Bilangan pekerja											
Kecenderungan masa kini											
Kecenderungan masa depan											
Purata harga jualan											
Kecenderungan masa kini											
Kecenderungan masa depan											
Jumlah permintaan											
Kecenderungan masa kini											
Kecenderungan masa depan											
Keadaan kewangan semasa											
Keadaan perolehan kredit semasa											
Petunjuk keyakinan (PK)											

Gross Revenue										
Present tendency										
Future tendency										
Number of employees										
Present tendency										
Future tendency										
Average selling price										
Present tendency										
Future tendency										
Volume of demand										
Present tendency										
Future tendency										
Current financial situation										
Current situation concerning access to credit										
Confidence indicator (CI)										

(Peratus/Per cent)

Jadual 5.4: Imbangan bersih bagi statistik industri kewangan
Table 5.4: Net balance of statistics for finance industry

IMBANGAN BERSIH NET BALANCE											(Peratus/Per cent)	
PETUNJUK STATISTIK	2021				2022				2023			STATISTICAL INDICATORS
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4			
Hasil kasar											Gross Revenue	
Kecenderungan masa kini	+16.7	-5.0	+21.1	+23.5	+29.4	-9.1	+28.6	+14.3	-		Present tendency	
Kecenderungan masa depan	+11.1	-5.6	+10.0	+36.8	+11.8	+5.9	0.0	+7.1	+4.8		Future tendency	
Bilangan pekerja											Number of employees	
Kecenderungan masa kini	+5.6	+5.0	+15.8	+17.6	+5.9	+14.3	+11.1	+4.8	-		Present tendency	
Kecenderungan masa depan	+11.1	+22.2	+30.0	+36.8	+17.6	+11.8	+28.6	+3.7	+14.3		Future tendency	
Jumlah permintaan											Volume of demand	
Kecenderungan masa kini	+25.0	+17.6	+29.4	+13.3	+33.3	+10.0	+8.0	+10.5	-		Present tendency	
Kecenderungan masa depan	+12.5	+25.0	+18.8	+41.2	+20.0	+26.7	+20.0	+20.0	+21.1		Future tendency	
Deposit											Deposits	
Kecenderungan masa kini	+26.7	+33.3	+20.0	-21.4	+35.7	+17.6	+17.4	0.0	-		Present tendency	
Kecenderungan masa depan	-20.0	0.0	0.0	+13.3	+35.7	+40.0	0.0	+8.7	+33.3		Future tendency	
Pinjaman dan pendahuluan											Loans and advances	
Kecenderungan masa kini	+11.8	+38.9	+11.1	+11.8	+35.3	+5.3	+20.8	+5.6	-		Present tendency	
Kecenderungan masa depan	-5.6	0.0	+22.2	+33.3	+41.2	+35.3	+31.6	+20.8	+22.2		Future tendency	
Keadaan kewangan semasa	-27.8	-25.0	-15.8	-11.8	-11.8	0.0	+7.1	+9.5	-		Current financial situation	
Keadaan perolehan kredit semasa	-27.8	-20.0	-15.8	-11.8	-17.6	0.0	-10.7	0.0	-		Current situation concerning access to credit	
Petunjuk keyakinan (PK)	+2.8	+7.4	+2.1	+16.5	+3.3	+16.1	+7.0	+7.0	+10.5		Confidence indicator (CI)	

Jadual 5.5: Imbangan bersih bagi statistik industri insurans
Table 5.5: Net balance of statistics for insurance industry

IMBANGAN BERSIH NET BALANCE										STATISTICAL INDICATORS
2021		2022			2023					
Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
Hasil kasar										
Kecenderungan masa kini		+100.0	0.0	-25.0	+42.9	+55.6	+25.0	+66.7	-	Gross Revenue Present tendency
Kecenderungan masa depan		+100.0	+37.5	+62.5	+75.0	+71.4	-11.1	+71.4	0.0	Future tendency
Bilangan pekerja										
Kecenderungan masa kini		0.0	+14.3	+25.0	0.0	+44.4	+25.0	+14.3	0.0	Number of employees Present tendency
Kecenderungan masa depan		+12.5	+62.5	+25.0	+25.0	+14.3	+11.1	+28.6	+50.0	Future tendency
Purata harga jualan										
Kecenderungan masa kini		+20.0	-20.0	+20.0	0.0	0.0	-20.0	+50.0	-25.0	Average selling price Present tendency
Kecenderungan masa depan		-20.0	+100.0	+20.0	-20.0	+25.0	0.0	+20.0	0.0	Future tendency
Jumlah permintaan										
Kecenderungan masa kini		+83.3	+66.7	+50.0	+40.0	+28.6	+66.7	0.0	+25.0	Volume of demand Present tendency
Kecenderungan masa depan		+83.3	+66.7	+50.0	+16.7	+80.0	+57.1	-50.0	0.0	Future tendency
Keadaan kewangan semasa		+37.5	+50.0	+50.0	+57.1	+44.4	-50.0	+66.7	-	Current financial situation
Keadaan perolehan kredit semasa		+37.5	+37.5	+37.5	+42.9	+55.6	+50.0	+42.9	-	Current situation concerning access to credit
Petunjuk keyakinan (PK)		+23.6	+66.7	+47.2	+34.7	+54.3	+39.7	+22.2	+29.5	Confidence indicator (CI)

Jadual 5.6: Imbangan bersih bagi statistik industri hartanah
Table 5.6: Net balance of statistics for real estate industry

IMBANGAN BERSIH NET BALANCE													STATISTICAL INDICATORS
2021				2022				2023					
Q4				Q1	Q2	Q3	Q4	Q1	D2	Q3	Q4		
PETUNJUK STATISTIK													

Jadual 5.7: Imbangan bersih bagi statistik industri teknologi maklumat dan komunikasi
Table 5.7: Net balance of statistics for information and communications technology industry

(Peratus/Per cent)													
PETUNJUK STATISTIK	IMBANGAN BERSIH NET BALANCE												
	2021				2022				2023				STATISTICAL INDICATORS
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
Hasil kasar												Gross Revenue	
Kecenderungan masa kini	+9.1	+18.2	+36.4	-27.3	+40.0	-16.7	+11.1	+9.1	-			Present tendency	
Kecenderungan masa depan	0.0	+9.1	0.0	+27.3	+18.2	+20.0	0.0	+11.1	+18.2			Future tendency	
Bilangan pekerja												Number of employees	
Kecenderungan masa kini	+18.2	+36.4	+27.3	+27.3	-20.0	+8.3	0.0	-18.2	-			Present tendency	
Kecenderungan masa depan	-9.1	+9.1	0.0	+27.3	+36.4	+10.0	+25.0	0.0	+18.2			Future tendency	
Purata harga jualan												Average selling price	
Kecenderungan masa kini	+10.0	-11.1	+20.0	0.0	-22.2	-27.3	+12.5	0.0	-			Present tendency	
Kecenderungan masa depan	+10.0	+10.0	-11.1	+30.0	+10.0	-11.1	-9.1	0.0	0.0			Future tendency	
Jumlah permintaan												Volume of demand	
Kecenderungan masa kini	+22.2	-10.0	+30.0	-11.1	+22.2	-9.1	-12.5	-18.2	-			Present tendency	
Kecenderungan masa depan	0.0	+20.0	+20.0	+30.0	+10.0	0.0	-9.1	-12.5	+18.2			Future tendency	
Kedadaan kewangan semasa	0.0	-18.2	-18.2	-18.2	+10.0	-8.3	-22.2	-9.1	-			Current financial situation	
Kedadaan perolehan kredit semasa	0.0	0.0	0.0	-27.3	+10.0	-16.7	-11.1	-9.1	-			Current situation concerning access to credit	
Petunjuk keyakinan (PK)	-2.4	+14.1	-2.7	+20.0	-6.4	+4.1	-17.2	-19.4	-3.0			Confidence indicator (CI)	

(Peratus/Per cent)

Jadual 5.8: Imbangan bersih bagi statistik industri makanan dan minuman
Table 5.8: Net balance of statistics for food and beverage industry

(Peratus/Per cent)										
PETUNJUK STATISTIK	IMBANGAN BERSIH NET BALANCE								STATISTICAL INDICATORS	
	2021				2022					
	2023									
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
Hasil kasar										Gross Revenue
Kecenderungan masa kini	+100.0	+17.6	+73.7	0.0	+17.6	-11.8	+28.6	-26.7	-	Present tendency
Kecenderungan masa depan	+68.4	+55.6	+35.3	+31.6	+64.7	+37.5	+41.2	+57.1	+13.3	Future tendency
Bilangan pekerja										Number of employees
Kecenderungan masa kini	-11.1	0.0	+31.6	+41.2	+35.3	+35.3	+42.9	-20.0	-	Present tendency
Kecenderungan masa depan	+21.1	+33.3	+5.9	+31.6	+64.7	+17.6	+41.2	+35.7	+20.0	Future tendency
Purata harga jualan										Average selling price
Kecenderungan masa kini	+16.7	+11.8	+26.3	+5.9	+41.2	+23.5	+14.3	-6.7	-	Present tendency
Kecenderungan masa depan	+26.3	+22.2	+35.3	+26.3	+23.5	+35.3	+17.6	+14.3	-6.7	Future tendency
Jumlah permintaan										Volume of demand
Kecenderungan masa kini	+100.0	+23.5	+73.7	+11.8	+11.8	-5.9	+21.4	-33.3	-	Present tendency
Kecenderungan masa depan	+68.4	+55.6	+35.3	+26.3	+52.9	+35.3	+23.5	+14.3	+6.7	Future tendency
Kedaaan kewangan semasa	0.0	-23.5	-5.3	0.0	+5.9	-5.9	-7.1	-20.0	-	Current financial situation
Kedaaan perolehan kredit semasa	0.0	-23.5	-5.3	-11.8	0.0	-11.8	-21.4	-13.3	-	Current situation concerning access to credit
Petunjuk keyakinan (PK)	+14.0	+53.7	+9.8	+33.3	+23.5	+17.6	+3.9	+2.4	-22.2	Confidence indicator (CI)

Jadual 5.9: Imbangan bersih bagi statistik industri pentadbiran dan khidmat sokongan

Table 5.9: Net balance of statistics for administrative and support service industry

(Peratus/Per cent)										
PETUNJUK STATISTIK	IMBANGAN BERSIH NET BALANCE								STATISTICAL INDICATORS	
	2021				2022					
	2023									
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3		Q4
Hasil kasar									Gross Revenue	
Kecenderungan masa kini	+16.7	-16.7	+60.0	+38.9	+41.2	+47.1	+38.9	+55.6	-	Present tendency
Kecenderungan masa depan	+22.2	+5.6	+22.2	+6.7	+22.2	+11.8	+47.1	+50.0	+55.6	Future tendency
Bilangan pekerja										Number of employees
Kecenderungan masa kini	-16.7	-22.2	+6.7	-5.6	+17.6	+47.1	+33.3	+16.7	-	Present tendency
Kecenderungan masa depan	0.0	0.0	+11.1	+13.3	+11.1	0.0	+11.8	+27.8	+50.0	Future tendency
Purata harga perkhidmatan										Average selling price
Kecenderungan masa kini	-16.7	-11.1	+6.7	+11.1	-5.9	+11.8	+5.6	+5.6	-	Present tendency
Kecenderungan masa depan	-11.1	-11.1	+5.6	+6.7	-5.6	-11.8	0.0	-5.6	+38.9	Future tendency
Jumlah permintaan										Volume of demand
Kecenderungan masa kini	+11.1	-11.1	+53.3	0.0	-5.9	+47.1	+11.1	+33.3	-	Present tendency
Kecenderungan masa depan	+16.7	+5.6	+11.1	0.0	+16.7	+5.9	+29.4	+44.4	+55.6	Future tendency
Kedadaan kewangan semasa	-38.9	-33.3	-13.3	+11.1	-11.8	+11.8	+5.6	+5.6	-	Current financial situation
Kedadaan perolehan kredit semasa	-27.8	-38.9	-20.0	+5.6	0.0	+5.9	+11.1	-5.6	-	Current situation concerning access to credit
Petunjuk keyakinan (PK)	-24.1	-5.6	-11.1	+13.3	+11.1	+2.0	+39.2	+22.2	+29.6	Confidence indicator (CI)

(Peratus/Per cent)

Jadual 5.10: Imbangan bersih bagi statistik industri profesional
Table 5.10: Net balance of statistics for professional industry

IMBANGAN BERSIH NET BALANCE										STATISTICAL INDICATORS		
2021				2022				2023				
Q4				Q1		Q2		Q3			Q4	
Q4				Q1		Q2		Q3			Q4	
PETUNJUK STATISTIK												
Hasil kasar											Gross Revenue	
Kecenderungan masa kini											Present tendency	
Kecenderungan masa depan											Future tendency	
Bilangan pekerja											Number of employees	
Kecenderungan masa kini											Present tendency	
Kecenderungan masa depan											Future tendency	
Purata harga perkhidmatan											Average selling price	
Kecenderungan masa kini											Present tendency	
Kecenderungan masa depan											Future tendency	
Jumlah permintaan											Volume of demand	
Kecenderungan masa kini											Present tendency	
Kecenderungan masa depan											Future tendency	
Keadaan kewangan semasa											Current financial situation	
Keadaan perolehan kredit semasa											Current situation concerning access to credit	
Petunjuk keyakinan (PK)											Confidence indicator (CI)	

Jadual 5.11: Imbangan bersih bagi statistik industri kesihatan
Table 5.11: Net balance of statistics for health industry

IMBANGAN BERSIH NET BALANCE												STATISTICAL INDICATORS										
2021				2022				2023														
Q4				Q1				Q2					Q3				Q4					
PETUNJUK STATISTIK																						
Hasil kasar													Gross Revenue									
Kecenderungan masa kini													+45.0	-27.8	+55.0	+81.3	+42.1	+16.7	+64.7	+78.3	-	Present tendency
Kecenderungan masa depan													+26.3	-20.0	+33.3	+35.0	+62.5	+31.6	+66.7	+58.8	+47.8	Future tendency
Bilangan pekerja																						Number of employees
Kecenderungan masa kini													+5.0	0.0	0.0	+18.8	+10.5	+58.8	+41.2	+52.2	-	Present tendency
Kecenderungan masa depan													+10.5	+25.0	+27.8	+15.0	+37.5	+26.3	+27.8	+47.1	+47.8	Future tendency
Purata harga perkhidmatan																						Average selling price
Kecenderungan masa kini													+30.0	+5.6	+5.0	+37.5	+26.3	+33.3	+41.2	+34.8	-	Present tendency
Kecenderungan masa depan													+10.5	+10.0	+16.7	+20.0	+31.3	+21.1	+33.3	+41.2	+39.1	Future tendency
Jumlah permintaan																						Volume of demand
Kecenderungan masa kini													+60.0	-38.9	+65.0	+75.0	+31.6	+11.1	+41.2	+69.6	-	Present tendency
Kecenderungan masa depan													+21.1	-20.0	+38.9	+40.0	+43.8	+31.6	+61.1	+52.9	+56.5	Future tendency
Keadaan kewangan semasa													0.0	+27.8	+25.0	+25.0	+26.3	+38.9	+29.4	+30.4	-	Current financial situation
Keadaan perolehan kredit semasa													+10.0	+5.6	+10.0	0.0	+15.8	+5.6	0.0	0.0	-	Current situation concerning access to credit
Petunjuk keyakinan (PK)													+1.8	+8.3	+1.9	+43.3	+52.1	+33.3	+37.0	+45.1	+53.6	Confidence indicator (CI)

Jadual 5.12: Imbangan bersih bagi statistik industri pendidikan
Table 5.12: Net balance of statistics for education industry

IMBANGAN BERSIH NET BALANCE													(Peratus/Per cent)	
PETUNJUK STATISTIK	2021				2022				2023				STATISTICAL INDICATORS	
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3		Q4
Hasil kasar														Gross Revenue
Kecenderungan masa kini	+5.3	-18.8	+40.0	+50.0	-26.3	-4.8	+33.3	+13.6	-					Present tendency
Kecenderungan masa depan	-55.6	-5.3	+56.3	+35.0	+12.5	+36.8	+33.3	+50.0	+27.3					Future tendency
Bilangan pekerja														Number of employees
Kecenderungan masa kini	0.0	0.0	-15.0	+18.8	+31.6	+47.6	+16.7	+22.7	-					Present tendency
Kecenderungan masa depan	+5.6	+36.8	+18.8	+40.0	+50.0	+26.3	+42.9	+55.6	+31.8					Future tendency
Purata harga perkhidmatan														Average selling price
Kecenderungan masa kini	-10.5	+12.5	-10.0	+6.3	+5.3	+28.6	+5.6	+18.2	-					Present tendency
Kecenderungan masa depan	-11.1	+21.1	0.0	0.0	0.0	+26.3	-4.8	+11.1	+4.5					Future tendency
Jumlah permintaan														Volume of demand
Kecenderungan masa kini	+21.1	-6.3	+15.0	+18.8	-5.3	-9.5	+27.8	+22.7	-					Present tendency
Kecenderungan masa depan	-44.4	0.0	+43.8	+25.0	+6.3	+42.1	+28.6	+61.1	+22.7					Future tendency
Kedaaan kewangan semasa	-36.8	-37.5	-15.0	-25.0	-21.1	-14.3	+5.6	-4.5	-					Current financial situation
Kedaaan perolehan kredit semasa	-31.6	-25.0	-25.0	-18.8	-21.1	-19.0	-11.1	-9.1	-					Current situation concerning access to credit
Petunjuk keyakinan (PK)	-25.9	-5.3	+2.1	+11.7	0.0	+7.0	+3.2	+37.0	+16.7					Confidence indicator (CI)

(Peratus/Per cent)

Jadual 5.13: Imbangan bersih bagi statistik industri perkhidmatan lain
Table 5.13: Net balance of statistics for other services industry

IMBANGAN BERSIH NET BALANCE											(Peratus/Per cent)			
PETUNJUK STATISTIK	2021				2022				2023				STATISTICAL INDICATORS	
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3		Q4
Hasil kasar														Gross Revenue
Kecenderungan masa kini	+4.8	+5.6	+36.8	+15.0	+19.0	-10.5	-15.8	+19.0	-					Present tendency
Kecenderungan masa depan	+36.4	-9.5	+27.8	-10.5	+30.0	-4.8	-5.3	-10.5	+19.0					Future tendency
Bilangan pekerja														Number of employees
Kecenderungan masa kini	-4.8	-5.6	-5.3	+10.0	+4.8	+5.3	0.0	0.0	-					Present tendency
Kecenderungan masa depan	+9.1	0.0	-5.6	-10.5	+5.0	0.0	+5.3	+15.8	+9.5					Future tendency
Purata harga perkhidmatan														Average selling price
Kecenderungan masa kini	+14.3	+16.7	+10.5	+20.0	+14.3	-5.3	-10.5	+4.8	-					Present tendency
Kecenderungan masa depan	+18.2	+4.8	+16.7	+10.5	+5.0	0.0	-5.3	0.0	-4.8					Future tendency
Jumlah permintaan														Volume of demand
Kecenderungan masa kini	0.0	+5.6	+26.3	+20.0	+14.3	-15.8	-26.3	+19.0	-					Present tendency
Kecenderungan masa depan	+36.4	-14.3	+27.8	-10.5	+25.0	-14.3	+5.3	0.0	+19.0					Future tendency
Kedaaan kewangan semasa	-23.8	0.0	-10.5	+10.0	0.0	0.0	-15.8	-19.0	-					Current financial situation
Kedaaan perolehan kredit semasa	-4.8	-11.1	-36.8	-10.0	-9.5	0.0	-21.1	-9.5	-					Current situation concerning access to credit
Petunjuk keyakinan (PK)	-13.6	-20.6	+13.0	-1.8	+18.3	+6.3	+1.8	-14.0	+7.9					Confidence indicator (CI)

(Peratus/Per cent)

Jadual 6.1: Keadaan semasa dan jangkaan perniagaan
Table 6.1: Current situation and business expectation

(Peratus/Per cent)											
SEKTOR	KEADAAN SEMASA CURRENT SITUATION				JANGKAAN ^ EXPECTATION				SEKTOR		
	IMBANGAN BERSIH NET BALANCE		NAIK UP	SAMA SAME	TURUN DOWN	IMBANGAN BERSIH NET BALANCE		NAIK UP		SAMA SAME	TURUN DOWN
Industri	-8.2	16.9	58.0	25.1	+7.5	31.5	44.5	24.0	Industry		
Pertanian	-2.3	16.3	65.1	18.6	+7.0	25.6	55.8	18.6	Agriculture		
Perlombongan	-11.1	22.2	44.4	33.3	+14.8	40.7	33.3	25.9	Mining		
Pembuatan	-12.8	13.6	60.0	26.4	+3.2	29.6	44.0	26.4	Manufacturing		
Elektrik dan air	+21.4	28.6	64.3	7.1	+21.4	35.7	50.0	14.3	Electricity and water		
Pembinaan	-27.6	10.3	51.7	37.9	+27.6	31.0	65.5	3.4	Construction		
Perdagangan borong dan runcit	-16.1	12.6	58.6	28.7	-4.6	23.0	49.4	27.6	Wholesale and retail trade		
Perdagangan borong	-27.6	10.3	51.7	37.9	-17.2	17.2	48.3	34.5	Wholesale trade		
Perdagangan runcit	+6.9	17.2	72.4	10.3	+20.7	34.5	51.7	13.8	Retail trade		
Perkhidmatan	-3.2	17.3	62.2	20.5	+19.0	38.6	41.9	19.5	Services		
Penginapan	+18.2	30.3	57.6	12.1	+63.6	69.7	24.2	6.1	Accommodation		
Pengangkutan dan penyimpanan	-10.3	13.8	62.1	24.1	+27.6	48.3	31.0	20.7	Transportation and storage		
Komunikasi	-7.1	14.3	64.3	21.4	-14.3	7.1	71.4	21.4	Communications		
Kewangan	0.0	9.5	81.0	9.5	+4.8	28.6	47.6	23.8	Finance		
Insurans	+50.0	50.0	50.0	0.0	+83.3	83.3	16.7	0.0	Insurance		
Hartanah	-15.0	15.0	55.0	30.0	+20.0	35.0	50.0	15.0	Real estate		
Teknologi maklumat dan komunikasi	-9.1	18.2	54.5	27.3	+18.2	36.4	45.5	18.2	Information and communications technology		
Makanan dan minuman	-40.0	13.3	33.3	53.3	-6.7	40.0	13.3	46.7	Food and beverage		
Pentadbiran dan khidmat sokongan	0.0	16.7	66.7	16.7	+55.6	66.7	22.2	11.1	Administrative and support services		
Profesional	+6.3	25.0	56.3	18.8	+37.5	50.0	37.5	12.5	Professional		
Kesihatan	+34.8	39.1	56.5	4.3	+56.5	56.5	43.5	0.0	Health		
Pendidikan	+4.5	18.2	68.2	13.6	+27.3	40.9	45.5	13.6	Education		
Perkhidmatan lain	-14.3	4.8	76.2	19.0	+23.8	33.3	57.1	9.5	Other services		
Semua sektor	-9.2	15.9	59.0	25.1	+9.8	32.0	45.7	22.2	All sectors		

Nota/ Notes: ^ Merujuk kepada enam bulan ke hadapan/ Refers to six months ahead

Table 6.2: Net balance of current business situation and expectation for the next six months

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RINGKASAN PENEMUAN
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NOTA TEKNIKAL
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Latar Belakang

Survei Kecenderungan Perniagaan dilaksanakan oleh Jabatan Perangkaan Malaysia setiap suku tahunan bermula pada tahun 2004. Survei ini mengumpul pandangan pihak pengurusan kanan terhadap prestasi perniagaan daripada sejumlah 631 pertubuhan yang mewakili pelbagai sektor ekonomi di Malaysia. Ciri utama survei ini adalah untuk mengumpul maklumat tentang arah perubahan bagi variabel ekonomi penting. Jawapan yang diberi adalah berdasarkan tiga jenis skala seperti meningkat / tiada perubahan / merosot; atau baik / memuaskan / kurang baik. Bagaimanapun ia tidak mencerminkan magnitud perubahan. Perlu diberi perhatian bahawa pandangan dalam survei ini adalah dipengaruhi oleh peristiwa yang berlaku pada waktu penghitungan.

Objektif Survei

Survei Kecenderungan Perniagaan mengumpul maklumat kualitatif daripada pengurus perniagaan tentang penilaian mereka terhadap prestasi perniagaan bagi tiga bulan yang lalu dan jangkaan bagi tiga dan enam bulan akan datang. Maklumat ini berguna bagi memantau keadaan ekonomi semasa.

Survei ini juga memberikan keputusan petunjuk kualitatif yang cepat, situasi semasa dan jangkaan bagi variabel ekonomi yang penting, ketika maklumat kuantitatif masih belum diperoleh. Pelaksanaan yang cepat dan pemprosesan hasil yang mudah dapat memberikan amaran awal terhadap titik perubahan dalam aktiviti ekonomi secara keseluruhan.

Skop dan Liputan

Survei ini meliputi empat sektor utama di Malaysia iaitu perindustrian, pembinaan, perdagangan borong & runcit dan perkhidmatan. Sektor industri meliputi pertanian, perlombongan, pembuatan dan elektrik & air manakala sektor perkhidmatan pula terdiri daripada penginapan, pengangkutan dan penyimpanan, komunikasi, kewangan, insurans, hartanah dan teknologi maklumat & komunikasi. Bermula suku tahun pertama 2020, liputan bagi sektor perkhidmatan diperluaskan termasuk makanan & minuman, pendidikan, pentadbiran & khidmat sokongan, profesional dan perkhidmatan lain. Sampel dipilih berdasarkan senarai syarikat yang diperoleh daripada Banci Ekonomi yang dijalankan pada tahun 2016 untuk tahun rujukan 2015.

Komunikasi merujuk kepada aktiviti telekomunikasi dan aktiviti perkhidmatan yang berkaitan, seperti transmisi suara, data, teks, bunyi dan video. Kemudahan transmisi ini mungkin berasaskan satu teknologi atau kombinasi bagi teknologi tersebut.

Teknologi maklumat & komunikasi merujuk kepada aktiviti penyediaan kepakaran di dalam bidang teknologi maklumat seperti penulisan, pengubahsuaian, percubaan dan perisian sokongan bagi memenuhi kehendak pelanggan tertentu; merancang dan mereka bentuk sistem komputer dengan mengintegrasikan teknologi perkakasan, perisian komputer dan komunikasi, pengurusan di lapangan dan operasi sistem komputer pelanggan dan / atau kemudahan memproses; menyediakan infrastruktur untuk *hosting* atau perkhidmatan proses data, dan aktiviti perkhidmatan profesional dan teknikal yang berkaitan dengan komputer.

Soal Selidik Survei

Soal selidik yang mudah dibentuk untuk dijawab oleh responden. Responden diminta untuk menjawab sama ada meningkat, tiada perubahan atau merosot mengikut variabel ekonomi penting. Oleh kerana jawapan yang diperlukan adalah arah atau saiz relatif variabel akan dilaporkan, maka soal selidik dapat dilengkapi dengan cepat. Soalan yang dikemukakan meliputi kedua-dua hasil daripada bulan-bulan terkini dan jangkaan bagi tempoh tiga dan enam bulan akan datang. Bilangan soalan dalam Survei Kecenderungan Perniagaan suku tahunan adalah kurang berbanding dengan survei lain.

Soalan-soalan ini terhad kepada variabel ekonomi penting untuk menjimatkan masa yang diambil bagi melengkapi soal selidik seterusnya mempercepatkan pungutan dan pemprosesan data survei.

Variabel dan tempoh liputan

Soalan	Variabel	Tiga Bulan Sebelum	Keadaan Semasa	Tiga Bulan Seterusnya
1.	Keadaan perniagaan		Enam bulan ke hadapan ✓	
2.	Keadaan perniagaan		✓	
3a.	Hasil kasar	✓	✓	
3b.	Bilangan pekerja	✓	✓	
3c.	Jumlah pengeluaran / permintaan / tempahan	✓	✓	
3d.	Purata harga jualan / pasaran eksport / pasaran domestik	✓	✓	
3e.	Aktiviti pembinaan	✓	✓	
3f.	Kapasiti teknikal	✓	✓	
3g.	Deposit	✓	✓	
3h.	Pinjaman dan pendahuluan	✓	✓	
3i.	Stok barangan siap	✓	✓	
3j.	Persaingan dalam aktiviti jualan borong/runcit	✓	✓	
4.	Keadaan kewangan semasa		✓	
5.	Perolehan kredit semasa		✓	
6.	Faktor kekangan kepada syarikat		✓	

Pungutan Data

Borang soal selidik diemel kepada semua syarikat yang terpilih. *Computer Assisted Telephone Interview* (CATI) digunakan untuk mendapatkan maklum balas daripada responden yang belum mengemukakan respons menerusi emel. Syarikat diminta memberi maklumat kualitatif tentang prestasi perniagaan dan jangkaan seperti yang dinyatakan dalam soal selidik.

Hasil Survei

Hasil survei pada umumnya dipersembahkan dalam bentuk **imbangan bersih** yang merupakan perbezaan di antara peratus responden yang memberi jawapan menggalakkan dan kurang menggalakkan. Ringkasan keputusan diperoleh dengan menggabungkan arah perubahan dan hanya imbalan bersih ditunjukkan.

Imbalan bersih dengan tanda yang sesuai, menunjukkan arah aliran perniagaan yang mana tanda positif menunjukkan kemungkinan besar aliran yang meningkat, sementara tanda negatif menunjukkan kemungkinan besar aliran yang menurun. Bagaimanapun, magnitud imbalan bersih hanya mencerminkan banyak berlakunya persepsi yang optimistik atau pesimistik bagi tempoh perbandingan dan bukan menggambarkan perubahan magnitud variabel berkenaan memandangkan maklumat tersebut tidak dipungut dalam survei ini.

Pengiraan Petunjuk Keyakinan

Untuk mendapatkan satu petunjuk keseluruhan, pemilihan satu set variabel survei digabungkan menjadi satu petunjuk komposit. Petunjuk tersebut dinamakan “petunjuk keyakinan” kerana ia merumuskan penilaian dan jangkaan keadaan perniagaan yang diberikan oleh responden. Petunjuk keyakinan terhasil daripada purata jumlah imbalan bersih bagi variabel yang terpilih.

Petunjuk keyakinan bagi kesemua industri dikira dengan menggunakan data dalam jadual berkenaan kecuali sektor perdagangan borong & runcit dan perkhidmatan yang dikira berdasarkan jadual berkenaan serta Jadual 6.2.

Petunjuk Keyakinan Pertanian (ACI)

$$ACI = (OB + EF)/3$$

OB = kecenderungan masa kini (jumlah tempahan bagi pasaran tempatan dan pasaran eksport)

EF = kecenderungan masa depan (bilangan pekerja)

Petunjuk Keyakinan Perlombongan (MNCI)

$$MNCI = (OB + EF)/2$$

OB = kecenderungan masa kini (jumlah tempahan)

EF = kecenderungan masa depan (bilangan pekerja)

Petunjuk Keyakinan Pembuatan (MCI)

$$MCI = (PF + OB - SF)/4$$

PF = kecenderungan masa depan (jumlah pengeluaran)

OB = kecenderungan masa kini (jumlah tempahan bagi pasaran tempatan dan pasaran eksport)

SF = kecenderungan masa kini (stok barangan siap (songsang))

Petunjuk Keyakinan Elektrik dan Air (ECI)

$$ECI = (OB + EF)/2$$

OB = kecenderungan masa kini (jumlah tempahan)

EF = kecenderungan masa depan (bilangan pekerja)

Petunjuk Keyakinan Pembinaan (CCI)

$$CCI = (OB + EF)/2$$

OB = kecenderungan masa kini (jumlah tempahan (kontrak))

EF = kecenderungan masa depan (bilangan pekerja)

Petunjuk Keyakinan Kewangan (FCI)

$$FCI = (BS + CD + ED)/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Perdagangan Borong (WCI)

$$WCI = (BS - S + BF)/3$$

BS = keadaan perniagaan semasa

S = kecenderungan masa kini (stok barangan siap (songsang))

BF = kecenderungan masa depan (perniagaan)

Petunjuk Keyakinan Perdagangan Runcit (RCI)

$$RCI = (BS - S + BF)/3$$

BS = keadaan perniagaan semasa

S = kecenderungan masa kini (stok barangan siap (songsang))

BF = kecenderungan masa depan (perniagaan)

Petunjuk Keyakinan Penginapan (ACCI)

$$ACCI = (BS + CD + ED)/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Pengangkutan dan Penyimpanan (TCI)

$$TCI = (BS + CD + ED)/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Komunikasi (CMCI)

$$CMCI = (BS + CD + ED)/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Pentadbiran dan Khidmat Sokongan (ASCI)

$$ASCI = (BS + CD + ED)/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Insurans (INCI)

$$\text{INCI} = (\text{BS} + \text{CD} + \text{ED})/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Profesional (PCI)

$$\text{PCI} = (\text{BS} + \text{CD} + \text{ED})/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Hartanah (RECI)

$$\text{RECI} = (\text{BS} + \text{CD} + \text{ED})/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Kesihatan (HCI)

$$\text{HCI} = (\text{BS} + \text{CD} + \text{ED})/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Teknologi Maklumat dan Komunikasi (ICTCI)

$$\text{ICTCI} = (\text{BS} + \text{CD} + \text{ED})/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Pendidikan (EDUCI)

$$\text{EDUCI} = (\text{BS} + \text{CD} + \text{ED})/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Makanan dan Minuman (FBCI)

$$\text{FBCI} = (\text{BS} + \text{CD} + \text{ED})/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Petunjuk Keyakinan Perkhidmatan Lain (OSCI)

$$\text{OSCI} = (\text{BS} + \text{CD} + \text{ED})/3$$

BS = keadaan perniagaan semasa

CD = kecenderungan masa kini (jumlah permintaan)

ED = kecenderungan masa depan (jumlah permintaan)

Keperluan Kerahsiaan

Survei ini dilaksanakan di bawah peruntukan Akta Perangkaan 1965 (Disemak 1989) yang menjelaskan bahawa kandungan penyata individu adalah sulit dan tidak akan dihebahkan kepada orang lain.

Pembundaran

Hasil tambah imbalan bersih di peringkat sektor mungkin berbeza kerana pembundaran.

Background

The Business Tendency Survey has been conducted at quarterly basis by the Department of Statistics, Malaysia since 2004. The survey gathers views on business performance from the senior management of 631 establishments in various economic sectors in Malaysia. The main characteristic of this survey is to collect information regarding the direction of change for key economic variables. The answers given are based on a three-point scale type e.g. Better / same / worse; or good / satisfactory / bad. However, they do not reflect the magnitude of change. It has to be noted that the views in this survey are affected by the events occurring during the time of enumeration.

Objective of the Survey

The Business Tendency Survey collects qualitative information from business managers on their assessment of the business performance for the past three months and the expectations for the next three and six months. The information is useful for monitoring the current economic situation.

The survey also provides rapid qualitative indicators of the outcome, the current situation and expectation for Important economic variables, where quantitative information is not yet available. The rapid execution and easy processing of results provide early warning of turning points in the overall economic activity.

Scope and Coverage

The survey covers four major sectors in Malaysia namely industry, construction, wholesale & retail trade and services. The industrial sector covers agriculture, mining, manufacturing and electricity & water whereas the services sector consists of accommodation, transportation and storage, communications, finance, insurance, real estate and information & communications technology. Starting first quarter of 2020, the coverage of services sector is expanded to include food & beverage, education, administrative & support services, professional, health and other services. The sample is obtained from the Economic Census conducted in 2016 for reference year 2015.

Communication refers to telecommunications and related service activities, i.e. transmitting voice, data, text, sound and video. The transmission facilities that carry out these activities may be based on a single technology or a combination of technologies.

Information and communication technology refers to activities providing expertise in the field of information technologies such as writing, modifying, testing and supporting software to meet the needs of a particular customer; planning and designing computer systems that integrate computer hardware, software and communication technologies; on-site management and operation of clients' computer systems and / or data processing facilities; providing infrastructure for hosting or data processing services; and other professional and technical computer-related activities.

Survey Questionnaire

A simple questionnaire is designed for the respondents to answer. The respondents are required to answer either higher, same or lower according to important economic variables. As the answer only requires the direction or relative size of the variable to be reported, the questionnaire can be completed relatively faster. The questions asked cover both outcomes for recent months and expectations for the coming three and six months. The number of questions in the quarterly Business Tendency Survey is considerably less than other surveys.

These questions are confined to key economic variables to reduce the time taken to fill in the questionnaire as well as to speed up collection and processing of survey data.

Variables and periods covered

Question	Variable	Last Three Months	Current Situation	Next Three Months
1.	Business situation		Six Months Ahead	✓
2.	Business situation		✓	
3a.	Gross revenue	✓	✓	
3b.	Number of employees	✓	✓	
3c.	Volume of production / demand / order	✓	✓	
3d.	Average selling price / export market / domestic market	✓	✓	
3e.	Construction activity	✓	✓	
3f.	Technical capacity	✓	✓	
3g.	Deposits	✓	✓	
3h.	Loans and advances	✓	✓	
3i.	Stock of finished goods	✓	✓	
3j.	Competition in wholesale/retail activity	✓	✓	
4.	Current financial situation		✓	
5.	Current access to credit		✓	
6.	Limitation factors to company		✓	

Data Collection

Questionnaires are e-mailed directly to all selected companies. Mode of Computer Assisted Telephone Interview (CATI) is used to obtain feedback from respondent who did not provide response to the questionnaires via e-mail. Companies are requested to provide qualitative information on their business performances and expectations as stipulated in the questionnaires.

Survey Results

The results of this survey are generally presented in the form of **net balance**, which is the difference between the percentage of respondents with favourable and unfavourable answers. The summary results are obtained by combining the direction of change and only the net balance is shown.

The net balance with its appropriate sign indicates the direction of the business trends, where a positive sign indicates a likely upward trend, while a negative sign indicates a likely downward trend. However, the magnitude of the net balance reflects only the prevalence of optimism or pessimism for the comparative period but does not reflect the magnitude of change of the variable concerned as the information is not collected in the survey.

Calculation of Confidence Indicator

In order to have an overall indicator, a selection of a set of survey variables is combined into a single composite indicator. These indicators are called “confidence indicators” because they summarise the assessments and expectations of the business situation provided by the respondents. The confidence indicators are derived from the average aggregated net balances of the selected variables.

The confidence indicator for all the industries are calculated based on the data of the respective table except for the wholesale & retail trade and services sectors which are calculated based on the respective table and Table 6.2.

Agriculture Confidence Indicator (ACI)

$$ACI = (OB + EF)/3$$

OB = present tendency (total volume of orders for domestic market and export market)

EF = future tendency (number of employees)

Mining Confidence Indicator (MNCI)

$$MNCI = (OB + EF)/2$$

OB = present tendency (volume of orders)

EF = future tendency (number of employees)

Manufacturing Confidence Indicator (MCI)

$$MCI = (PF + OB - SF)/4$$

PF = future tendency (volume of production)

OB = present tendency (total volume of orders for domestic market and export market)

SF = present tendency (stocks of finished goods) (inverted)

Electricity and Water Confidence Indicator (ECI)

$$ECI = (OB + EF)/2$$

OB = present tendency (volume of orders)

EF = future tendency (number of employees)

Construction Confidence Indicator (CCI)

$$CCI = (OB + EF)/2$$

OB = present tendency (volume of orders) (contracts)

EF = future tendency (number of employees)

Wholesale Trade Confidence Indicator (WCI)

$$WCI = (BS - S + BF)/3$$

BS = current business situation

S = present tendency (stocks of finished goods) (inverted)

BF = future tendency (business situation)

Retail Trade Confidence Indicator (RCI)

$$RCI = (BS - S + BF)/3$$

BS = current business situation

S = present tendency (stocks of finished goods) (inverted)

BF = future tendency (business situation)

Accommodation Confidence Indicator (ACCI)

$$ACCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Transportation and Storage Confidence Indicator (TCI)

$$TCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Communications Confidence Indicator (CMCI)

$$CMCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Finance Confidence Indicator (FCI)

$$FCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Insurance Confidence Indicator (INCI)

$$INCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Real Estate Confidence Indicator (RECI)

$$RECI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Information and Communications Technology Confidence Indicator (ICTCI)

$$ICTCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Food and beverage Confidence Indicator (FBCI)

$$FBCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Education Confidence Indicator (EDUCI)

$$EDUCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Administrative and Support Service Confidence Indicator (ASCI)

$$ASCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Professional Confidence Indicator (PCI)

$$PCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Health Confidence Indicator (HCI)

$$HCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Other Services Indicator (OSCI)

$$OSCI = (BS + CD + ED)/3$$

BS = current business situation

CD = present tendency (volume of demand)

ED = future tendency (volume of demand)

Confidentiality Requirements

The survey is conducted under provisions of the Statistics Act 1965 (Revised 1989) which provides that the contents of individual returns are confidential and will not be divulged to any person.

Rounding

The sum of net balances at sector level may differ due to rounding.

Kalendar Awalan Keluaran Statistik Kecenderungan Perniagaan Suku Pertama - Suku Keempat 2023

*Advance Release Calendar for Business Tendency Statistics
First Quarter - Fourth Quarter 2023*

Suku Tahun Rujukan / Reference Quarter	Tarikh / Date
Suku Pertama 2023 <i>First Quarter 2023</i>	23 Februari 2023 <i>23 February 2023</i>
Suku Kedua 2023 <i>Second Quarter 2023</i>	24 Mei 2023 <i>24 May 2023</i>
Suku Ketiga 2023 <i>Third Quarter 2023</i>	29 Ogos 2023 <i>29 August 2023</i>
Suku Keempat 2023 <i>Fourth Quarter 2023</i>	23 November 2023 <i>23 November 2023</i>

Nota / Notes:

Tarikh siaran tertakluk kepada pindaan.

Release dates are subject to change.

February							May							August							November						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4		1	2	3	4	5	6			1	2	3	4	5				1	2	3	4
5	6	7	8	9	10	11	7	8	9	10	11	12	13	6	7	8	9	10	11	12	5	6	7	8	9	10	11
12	13	14	15	16	17	18	14	15	16	17	18	19	20	13	14	15	16	17	18	19	12	13	14	15	16	17	18
19	20	21	22	23	24	25	21	22	23	24	25	26	27	20	21	22	23	24	25	26	19	20	21	22	23	24	25
26	27	28					28	29	30	31				27	28	29	30	31			26	27	28	29	30		