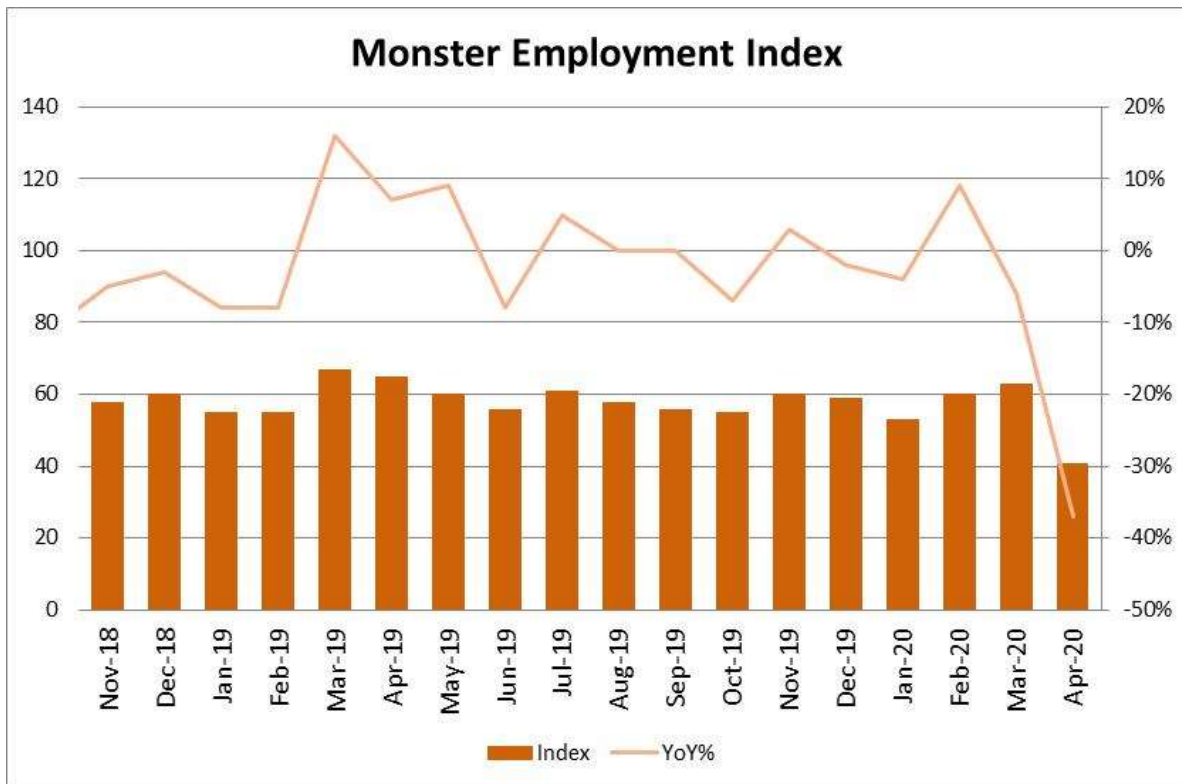


monster[®] EMPLOYMENT INDEX

Monster Employment Index Malaysia

April 2020 Index Highlights:

- Monster Employment Index Malaysia witnesses annual decline of 37 percent in April 2020.
- All the industry sectors and occupation categories register receded growth on annual basis.



Monster Employment Index Malaysia results for the past 18 months are as follows:

| Nov 18 | Dec 18 | Jan 19 | Feb 19 | Mar 19 | Apr 19 | May 19 | Jun 19 | Jul 19 | Aug 19 | Sep 19 | Oct 19 | Nov 19 | Dec 19 | Jan 20 | Feb 20 | Mar 20 | Apr 20 | Y-o-Y |
|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------|
| 58 | 60 | 55 | 55 | 67 | 65 | 60 | 56 | 61 | 58 | 56 | 55 | 60 | 59 | 53 | 60 | 63 | 41 | -37% |

COVID pandemic has significantly impacted businesses in Malaysia. Subsequently, hiring has slowed down across sectors and job-roles.

Industry Year-over-year Trends: All the industry sectors and monitored by the Index, witnessed decline in online recruitment activity.

- The decline in hiring among sectors is primarily led by **Logistic, Courier/ Freight/ Transportation, Shipping/ Marine** (down 78 percent) and **Retail** (down 76 percent).
- Some of the less affected sectors include: **Oil and Gas** (down 10 percent) and **Production/Manufacturing, Automotive and Ancillary** (down 16 percent).

Top Growth Industries

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Oil and Gas | 106 | 95 | -10% |
| Production/Manufacturing, Automotive and Ancillary | 93 | 78 | -16% |
| Hospitality | 63 | 46 | -27% |
| IT, Telecom/ISP and BPO/ITES | 134 | 95 | -29% |

Lowest Growth Industries

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Engineering, Construction and Real Estate | 62 | 41 | -34% |
| BFSI | 71 | 40 | -44% |
| Retail | 54 | 13 | -76% |
| Logistic, Courier/ Freight/ Transportation, Shipping/ Marine | 73 | 16 | -78% |

Occupation Year-over-year Trends: All of the nine job-roles monitored by the Index saw decline in online demand.

- **Marketing & Communications** (down 20 percent) followed by **Software, Hardware, Telecom** (down 23 percent) recorded the least year-on-year decline.
- Whereas, **Customer Service** (down 48 percent), **Purchase/ Logistics/ Supply Chain** (down 50 percent) and **Hospitality & Travel** (down 51 percent) registered the steepest plunge in April 2020 from the year-ago level.

Top Growth Occupations

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|--------------------------------------|--------|--------|----------------|
| Marketing & Communications | 83 | 66 | -20% |
| Software, Hardware, Telecom | 82 | 63 | -23% |
| Engineering /Production, Real Estate | 66 | 48 | -27% |
| Finance & Accounts | 67 | 46 | -31% |

Lowest Growth Occupations

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|-----------------------------------|--------|--------|----------------|
| Sales & Business Development | 82 | 53 | -35% |
| Customer Service | 23 | 12 | -48% |
| Purchase/ Logistics/ Supply Chain | 76 | 38 | -50% |
| Hospitality & Travel | 39 | 19 | -51% |

COUNTRY-WISE TRENDS

Singapore Highlights

- Monster Employment Index Singapore declines by eight percent in April 2020, on-the-year.
- Among industry sectors, Health Care witnesses the most-notable growth; and, Retail/Trade and Logistics register the steepest decline on-the-year.
- Software, Hardware, Telecom professionals chart the most-notable growth in online demand, on annual basis.

Singapore Top Growth Industries

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|--|--------|--------|----------------|
| Health Care | 117 | 122 | 4% |
| Consumer Goods/ FMCG, Food & Packaged Food , Home Appliance, Garments/ Textiles/ Leather, Gems & Jewellery | 96 | 98 | 2% |
| Government/ PSU/ Defence | 83 | 84 | 1% |

Singapore Lowest Growth Industries

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|---|--------|--------|----------------|
| Engineering, Construction and Real Estate | 103 | 93 | -10% |
| Hospitality | 123 | 101 | -18% |
| Retail/Trade and Logistics | 122 | 96 | -21% |

Singapore Top Growth Occupations

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|-----------------------------|--------|--------|----------------|
| Software, Hardware, Telecom | 147 | 166 | 13% |
| Health Care | 114 | 119 | 4% |
| Legal | 108 | 104 | -4% |

Singapore Lowest Growth Occupations

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|------------------------------|--------|--------|----------------|
| Finance & Accounts | 95 | 79 | -17% |
| Sales & Business Development | 104 | 86 | -17% |
| Hospitality & Travel | 104 | 79 | -24% |

Philippines Highlights

- Monster Employment Index Philippines witnesses decline of five percent in April 2020, from the year-ago level.
- BPO/ITES records the most-notable annual growth among industry sectors; whereas, Logistic, Courier/ Freight/ Transportation, Import/Export, Shipping register the steepest decline.
- Among job-roles, Software, Hardware, Telecom led growth in online demand from the year-ago level.

Philippines Top Growth Industries

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|-----------------------|--------|--------|----------------|
| BPO/ITES | 137 | 161 | 18% |
| IT, Telecom/ISP | 143 | 163 | 14% |
| BFSI | 164 | 167 | 2% |

Philippines Lowest Growth Industries

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|---|--------|--------|----------------|
| Education | 114 | 95 | -17% |
| Retail | 192 | 143 | -26% |
| Logistic, Courier/ Freight/ Transportation, Import/Export, Shipping | 174 | 122 | -30% |

Philippines Top Growth Occupations

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|-----------------------------|--------|--------|----------------|
| Software, Hardware, Telecom | 151 | 180 | 19% |
| Customer Service | 132 | 149 | 13% |
| Finance & Accounts | 173 | 159 | -8% |

Philippines Lowest Growth Occupations

| Year-over-year Growth | Apr 19 | Apr 20 | % Growth Y-o-Y |
|-----------------------------------|--------|--------|----------------|
| HR & Admin | 149 | 121 | -19% |
| Sales & Business Development | 135 | 103 | -24% |
| Purchase/ Logistics/ Supply Chain | 166 | 99 | -40% |

By Industry

| | 2019 | | | | | | | | | 2020 | | | |
|--|------|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|
| | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr |
| IT, Telecom/ISP and BPO/ITES | 134 | 127 | 125 | 136 | 141 | 139 | 138 | 149 | 146 | 123 | 138 | 138 | 95 |
| Engineering, Construction and Real Estate | 62 | 59 | 54 | 59 | 56 | 56 | 56 | 58 | 57 | 51 | 56 | 60 | 41 |
| BFSI | 71 | 65 | 59 | 68 | 64 | 62 | 57 | 63 | 63 | 55 | 67 | 68 | 40 |
| Production/Manufacturing, Automotive and Ancillary | 93 | 89 | 88 | 91 | 88 | 88 | 87 | 89 | 89 | 86 | 91 | 93 | 78 |
| Oil and Gas | 106 | 99 | 102 | 110 | 116 | 102 | 98 | 99 | 101 | 96 | 100 | 105 | 95 |
| Hospitality | 63 | 63 | 59 | 66 | 71 | 61 | 58 | 66 | 68 | 68 | 64 | 59 | 46 |
| Retail | 54 | 47 | 42 | 48 | 45 | 45 | 40 | 45 | 40 | 30 | 43 | 46 | 13 |
| Logistic, Courier/ Freight/ Transportation, Shipping/ Marine | 73 | 68 | 59 | 71 | 63 | 59 | 59 | 58 | 58 | 45 | 55 | 66 | 16 |
| Advertising, Market Research, Public Relations, Media and Entertainment | 63 | 58 | 55 | 60 | 58 | 56 | 57 | 61 | 60 | 54 | 62 | 63 | 44 |

By Occupation

| | 2019 | | | | | | | | | 2020 | | | |
|---|------|-----|-----|-----|-----|-----|-----|-----|-----|------|-----|-----|-----|
| | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr |
| Software, Hardware, Telecom | 82 | 71 | 68 | 78 | 74 | 75 | 77 | 78 | 72 | 58 | 83 | 93 | 63 |
| Finance & Accounts | 67 | 63 | 59 | 65 | 61 | 60 | 56 | 60 | 60 | 55 | 63 | 64 | 46 |
| Sales & Business Development | 82 | 77 | 74 | 78 | 75 | 75 | 71 | 75 | 71 | 64 | 74 | 78 | 53 |
| Customer Service | 23 | 23 | 22 | 27 | 22 | 23 | 24 | 30 | 27 | 17 | 19 | 16 | 12 |
| Marketing & Communications | 83 | 79 | 77 | 80 | 77 | 76 | 76 | 79 | 77 | 74 | 79 | 80 | 66 |
| HR & Admin | 62 | 59 | 56 | 60 | 56 | 56 | 55 | 57 | 55 | 52 | 56 | 57 | 42 |
| Engineering /Production, Real Estate | 66 | 62 | 59 | 64 | 60 | 60 | 60 | 61 | 61 | 56 | 62 | 65 | 48 |
| Hospitality & Travel | 39 | 37 | 47 | 41 | 44 | 39 | 40 | 53 | 55 | 34 | 35 | 24 | 19 |
| Purchase/ Logistics/ Supply Chain | 76 | 72 | 65 | 74 | 69 | 67 | 66 | 65 | 65 | 57 | 64 | 72 | 38 |