SGX beneficiaries

Riding China's recovery

STOCK NAME	MARKET CAP (S$M)	% OF REVENUE FROM CHINA	P/E	TOTAL RETURN YTD (%)
Wilmar International	27,720	39	14.4	19.9
CapitaLand	13,865	69	9.9	-20.5
ST Engineering	10,532	53*	18.6	-9
Keppel Corporation	7,452	14	-	-30.8
Yangzijiang Shipbuilding	3,786	57	7.5	-1.5
Mapletree North Asia Commercial Trust	2,903	41	0.63^	-28.8
Sembcorp Industries	2,358	15	-	22.1
Yanlord Land	2,183	100	4.1	-1
CapitaLand Retail China Trust	1,370	100	0.69^	-23
First Sponsor Group	1,195	49	7.8	2.9
Hutchison Port Holdings Trust	1,115	65	0.34^	-18.6
Sasseur Reit	921	100	0.85^	4.6
Hi-P International	872	24	10.9	-4.5
China Aviation Oil	770	-	8.2	-22.1
Dasin Retail Trust	621	100	0.59^	0.1
EC World Reit	539	100	0.77^	-0.6
SIIC Environment	495	100	4.2	-16.7
HRnetGroup	446	27**	8.7	-21.8
Valuetronics	231	100***	6.5	-9.6
Fu Yu Corp	177	54	11.8	11.6

^Price-to-book ratio
**For Asia; no breakdown provided*
***For North Asia; no breakdown provided*
****For Greater China; no breakdown provided*

Note: Data as at Sept 24

Source: BLOOMBERG