

# BASL Daily Market Commentary

Monday, July 2, 2018

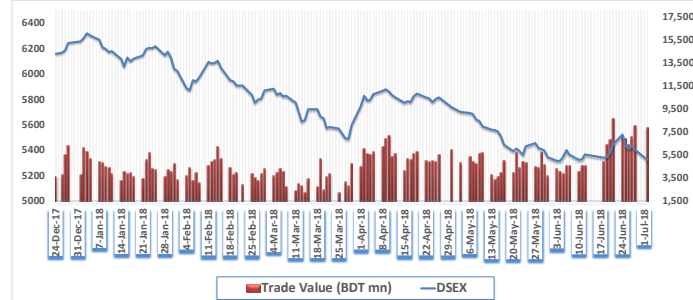
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## Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index declined by 83.0 points or 1.5% and closed at 5322.4 points today. The blue-chip index DS30 and the shariah based index DSES closed in red closing to 1915.8 and 1247.8 respectively. Turnover stood at BDT 7848 million (USD 94.5 million), about -2.08% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Ceramics sector (+2.2%) was the highest gainer, followed by Fuel & Power (+1.3%) and Textiles (+1.3%) respectively, whereas Paper & Printing (-7.0%) was the highest loser, followed by Jute (-3.0%) and NBFIs (-2.9%). RSRMSTEEL (-3.7%) was the highest traded share with a turnover of BDT 334.2 million followed by MONNOCERA (+1.5%) and BEXIMCO (+2.9%) respectively. Textiles sector has highest turnover of 21.5% in the market. CNATEX (+10.0%) was the today's top gainer while PLFLS (-18.2%) was the top loser today.

## Last Six Months Market Movement



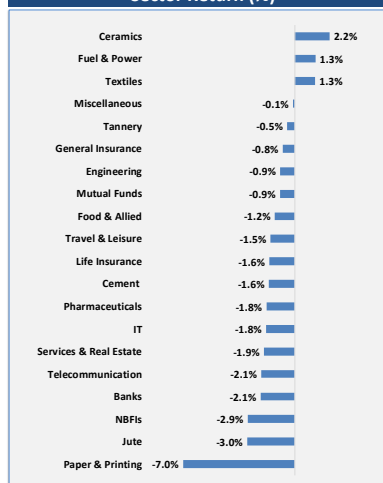
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5322.4	5405.5	-83.0	-1.5%	-14.8%
DSES	1247.8	1263.8	-16.0	-1.3%	-10.3%
DS30	1915.8	1959.9	-44.1	-2.3%	-16.1%
Total Scripts					
	330	106	206	30	
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	16.0	16.2	Market RSI (14)	39.81	47.05
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,827,062	3,847,348	(20,286)	-0.53%
	Mn USD	46,109	46,354	(244)	
Turnover	Mn BDT	7,848	8,014	(167)	-2.08%
	Mn USD	94.5	96.6	(2.0)	
Volume	Mn Shares	164.2	151.0	13.2	9%

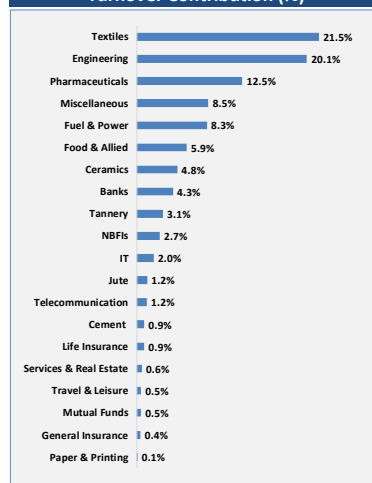
## Sector Review

Sector Index	No. of Company	Turnover (mn)	(%) of Total Turnover	Turnover Δ (%)	M.Cap (mn)	(%) of Total M.Cap	M.Cap Δ (%)	P/E (x)
Banks	30	294.8	4.3%	-40.5%	545,092	17.0%	-2.1%	10.1
Cement	7	61.4	0.9%	-46.7%	115,640	3.6%	-1.6%	37.0
Ceramics	5	330.9	4.8%	25.4%	30,538	1.0%	2.2%	25.4
Engineering	35	1386.1	20.1%	1.6%	188,873	5.9%	-0.9%	17.8
Food & Allied	18	408.3	5.9%	20.8%	272,697	8.5%	-1.2%	20.2
Fuel & Power	18	571.8	8.3%	-7.3%	402,681	12.6%	1.3%	13.4
General Insurance	35	31.0	0.4%	37.5%	36,832	1.1%	-0.8%	9.7
IT	8	138.2	2.0%	-12.3%	14,970	0.5%	-1.8%	17.6
Jute	3	84.2	1.2%	-31.3%	1,888	0.1%	-3.0%	381.0
Life Insurance	12	61.4	0.9%	-14.4%	47,859	1.5%	-1.6%	n/m
Miscellaneous	12	584.0	8.5%	-1.4%	77,364	2.4%	-0.1%	19.3
Mutual Funds	36	35.1	0.5%	-38.7%	40,432	1.3%	-0.9%	11.8
NBFIs	23	188.1	2.7%	-28.4%	203,547	6.3%	-2.9%	16.9
Paper & Printing	2	5.9	0.1%	-33.1%	2,006	0.1%	-7.0%	n/m
Pharmaceuticals	28	860.1	12.5%	3.0%	511,241	15.9%	-1.8%	18.6
Services & Real Estate	4	40.5	0.6%	14.5%	18,755	0.6%	-1.9%	15.3
Tannery	6	213.9	3.1%	-0.7%	26,383	0.8%	-0.5%	24.2
Telecommunication	2	83.4	1.2%	-51.9%	530,757	16.5%	-2.1%	20.7
Textiles	48	1484.1	21.5%	27.3%	119,398	3.7%	1.3%	18.4
Travel & Leisure	4	35.5	0.5%	-26.1%	21,500	0.7%	-1.5%	28.5

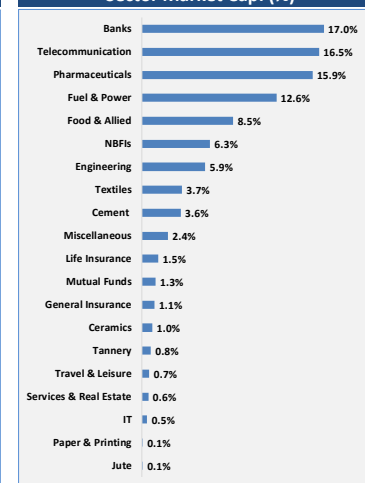
## Sector Return (%)



## Turnover Contribution (%)



## Sector Market Cap. (%)



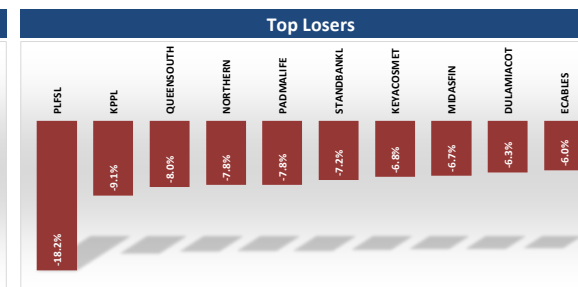
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
RSRMSTEEL	67.2	-3.7%	334.2	4.3%
MONNOCERA	310.5	1.5%	279.4	3.6%
BEXIMCO	25.7	-1.9%	195.8	2.5%
UPGDCL	271.4	8.7%	179.4	2.3%
PRIMETEX	36.3	3.1%	168.8	2.2%
SQURPHARMA	284.7	-2.9%	163.2	2.1%
AIL	98.3	-3.6%	146.4	1.9%
PTL	52.7	-0.8%	139.2	1.8%
WATACHEM	343.8	7.7%	135.5	1.7%
QUEENSOUTH	57.3	-8.0%	113.2	1.5%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	381	-2.0%	514,464	16.0%
SQURPHARMA	284.7	-2.9%	209,935	6.5%
BATBC	3411.1	-1.3%	204,666	6.4%
UPGDCL	271.4	8.7%	108,354	3.4%
ICB	145.5	-4.2%	96,678	3.0%
RENATA	1264.3	-2.5%	88,540	2.8%
BRACBANK	67.7	-4.9%	72,608	2.3%
LHBL	55	-2.5%	63,876	2.0%
OLYMPIC	219.3	-2.3%	43,847	1.4%
SUMITPOWER	37.6	-0.8%	40,152	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings				Performances of World Stock Indices				
Scrip	Declaration	Record Date	AGM Date	Indices	Country	Index Value	Change	Change (%)
				DJIA	USA	24,682	-45	-0.2%
				FTSE 100	UK	7,039	-22	-0.3%
				SENSEX	India	33,133	-3	0.0%
				Nikkei 225	Japan	21,592	211	1.0%
				STI	Singapore	3,507	-4	-0.1%
				SSE Comp.	China	3,266	-15	-0.5%
				NASDAQ Co	USA	7,345	-19	-0.3%
				NYSE Comp.	USA	12,684	20	0.2%

## Today's News Cut

### LANKABAFIN: Credit Rating Result

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the Rating of the Company as "AA3" in the Long Term and "ST-2" in the Short Term along with a stable outlook based on audited financial statements up to December 31, 2017 and other relevant quantitative as well as qualitative information up to the date of rating declaration.

### UTTARABANK: Credit Rating Result

Emerging Credit Rating Limited (ECRL) has assigned the surveillance rating of the Company as "AA" in the long term and "ST-2" in the short term along with a stable outlook based on audited financial statements of the Company up to December 31, 2017 and other relevant quantitative as well as qualitative information up to the date of rating.

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	73.9	-0.3%	43.7	74.5
Gold (\$/Ounce)	1249.9	-0.4%	1204.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.7	97.5	110.3	1.2	61.8

\*Considering current outstanding no. of shares; \*Changes/return has calculated based on the dividend adjusted price on record date; \*Change in price of stocks calculated with the previous close price and today's close price. \*PE excludes stocks with negative earnings and Z category \*Turnover includes block trade

Source: www.dsebd.org, www.bloomberg.com, www.finance.yahoo.com, http://money.cnn.com, https://fx-rate.net

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## About Bank Asia Securities (BASL)

Bank Asia Securities Limited (BASL) is one of the leading full-service brokerage companies in Bangladesh. The company was formed in 2009 and running its operation as a majority owned subsidiary of Bank Asia Limited. BASL offers full-fledged standard brokerage services for retail, institutional and foreign clients with a dedicated team of skilled professionals. The company is currently providing the brokerage services under the membership of Dhaka Stock Exchange Limited (DSE).

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