

# BASL Daily Market Commentary

Thursday, July 5, 2018

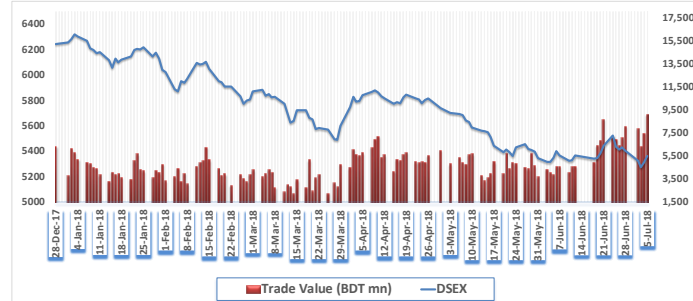
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
info@basl-bd.com, Tel- 9515826-2, www.basl-bd.com



## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index advanced by 53.2 points or 1.0% and closed at 5362.3 points today. The blue-chip index DS30 and the shariah based index DSES closed in green closing to 1926.5 and 1261.3 respectively. Turnover stood at BDT 9028 million (USD 108.8 million), about +21.80% higher than the previous trading session's value. Most of the sectors witnessed bullish performance today. Service & Real Estate sector (+3.6%) was the highest gainer, followed by IT (+3.5%) and Engineering (+2.7%) respectively, whereas Paper & Printing (-4.0%) was the highest loser, followed by Ceramics (-2.3%) and Jute (-2.0%). AIL (+3.1%) was the highest traded share with a turnover of BDT 359.7 million followed by FORTUNE (+9.4%) and RSRMSTEEL (-5.1%) respectively. Engineering sector has highest turnover of 23.3% in the market. SPCL (+10.0%) was the today's top gainer while DULAMACOT (-9.2%) was the top loser today.

## Last Six Months Market Movement



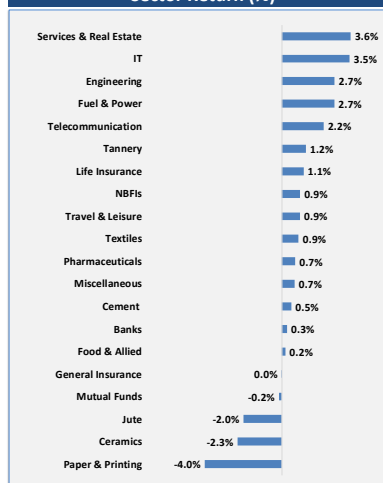
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5362.3	5309.1	53.2	1.0%	-14.1%
DSES	1261.3	1245.5	15.8	1.3%	-9.3%
DS30	1926.5	1902.6	23.9	1.3%	-15.6%
Total Scripts					
	330	192	107	40	
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	16.6	16.5	Market RSI (14)		
			46.08	40.43	
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,863,953	3,826,120	37,833	
	Mn USD	46,554	46,098	456	0.99%
Turnover	Mn BDT	9,028	7,412	1,616	
	Mn USD	108.8	89.3	19.5	21.80%
Volume	Mn Shares	208.0	170.7	37.3	
				22%	

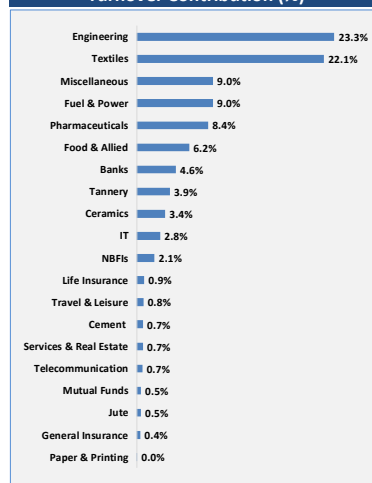
## Sector Review

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	387.3	4.6%	30.0%	541,650	16.7%	0.3%	11.4
Cement	7	61.2	0.7%	16.9%	115,433	3.6%	0.5%	36.9
Ceramics	5	281.2	3.4%	-12.8%	31,633	1.0%	-2.3%	26.3
Engineering	35	1957.5	23.3%	70.2%	194,176	6.0%	2.7%	18.4
Food & Allied	18	518.7	6.2%	49.8%	273,230	8.4%	0.2%	20.3
Fuel & Power	18	753.6	9.0%	66.1%	422,006	13.0%	2.7%	14.0
General Insurance	35	34.8	0.4%	36.4%	36,894	1.1%	0.0%	9.7
IT	8	232.2	2.8%	68.2%	15,388	0.5%	3.5%	18.1
Jute	3	40.1	0.5%	17.1%	1,771	0.1%	-2.0%	357.4
Life Insurance	12	74.4	0.9%	20.8%	48,222	1.5%	1.1%	n/m
Miscellaneous	12	755.5	9.0%	24.8%	77,359	2.4%	0.7%	19.3
Mutual Funds	36	41.2	0.5%	32.5%	40,440	1.2%	-0.2%	11.8
NBFIs	23	175.8	2.1%	34.6%	201,129	6.2%	0.9%	16.9
Paper & Printing	2	3.8	0.0%	-8.4%	2,012	0.1%	-4.0%	n/m
Pharmaceuticals	28	707.0	8.4%	40.3%	509,113	15.7%	0.7%	18.5
Services & Real Estate	4	60.8	0.7%	162.6%	19,649	0.6%	3.6%	16.0
Tannery	6	327.0	3.9%	14.0%	26,804	0.8%	1.2%	24.5
Telecommunication	2	56.1	0.7%	-3.9%	534,524	16.5%	2.2%	20.9
Textiles	48	1854.4	22.1%	11.7%	124,671	3.9%	0.9%	19.2
Travel & Leisure	4	65.4	0.8%	53.5%	21,635	0.7%	0.9%	28.7

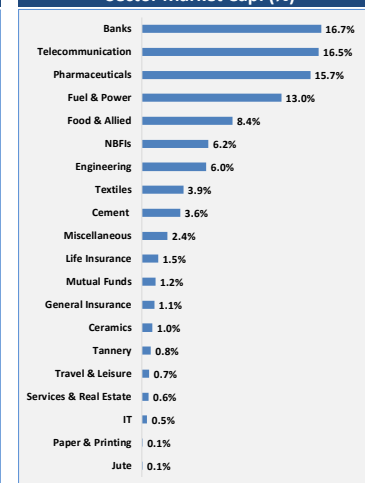
## Sector Return (%)



## Turnover Contribution (%)



## Sector Market Cap. (%)



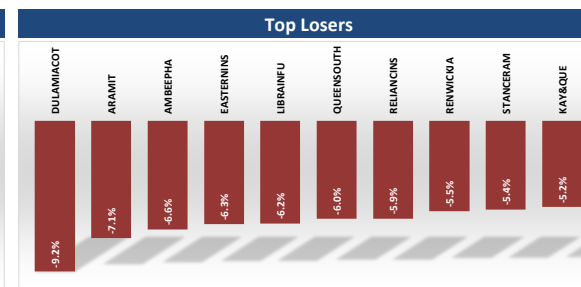
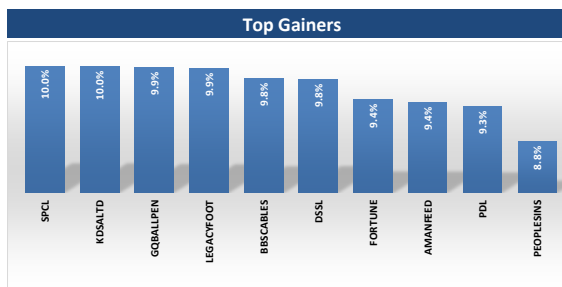
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
AIL	104	3.1%	359.7	4.0%
FORTUNE	33.6	9.4%	263.0	2.9%
RSRMSTEEL	65.4	-5.1%	217.5	2.4%
UPGDCL	306.3	3.2%	204.9	2.3%
BBSCABLES	78.6	9.8%	202.9	2.3%
MONNOCERA	301.1	2.3%	181.7	2.0%
BEXIMCO	26.1	1.6%	147.8	1.6%
ANWARGALV	88	0.3%	143.8	1.6%
SINOBANGLA	62.7	7.5%	139.0	1.5%
PRIMETEX	37	-1.3%	136.8	1.5%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	383.9	2.3%	518,380	16.0%
SQURPHARMA	284.4	0.2%	209,714	6.5%
BATBC	3406	-0.5%	204,360	6.3%
UPGDCL	306.3	3.2%	122,287	3.8%
ICB	142.8	1.4%	94,884	2.9%
RENATA	1255.8	0.0%	87,945	2.7%
BRACBANK	70	2.9%	75,075	2.3%
LHBL	55.1	1.1%	63,992	2.0%
OLYMPIC	222.9	3.2%	44,566	1.4%
SUMITPOWER	38.9	4.6%	41,540	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

### PRIMEBANK: Sale Declaration of a Sponsor

Mrs. Khushe Akhter, one of the Sponsors of the Company, has expressed her intention to sell 40,056 shares out of her total holding of 4,40,617 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

### MARICO: Board Meeting schedule under LR 16(1)

As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on July 18, 2018 at 4:00 PM to consider, among others, audited financial statements of the Company for the First Quarter (Q1) period ended on June 30, 2018.

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	74.1	-0.1%	43.7	75.3
Gold (\$/Ounce)	1254.7	0.1%	1204.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.8	97.9	110.8	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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