

# BASL Daily Market Commentary

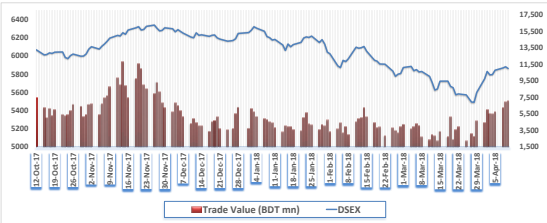
Thursday, April 10, 2018



## Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index declined by 19.8 points or -0.3% and closed at 5859.6 points today. The blue-chip index D530 both and the shariah based index DSES both closed in red closing to 2195.7 and 1360.4 respectively. Turnover stood at BDT 7,110 million (USD 85.7 million), about 2.81% higher than the previous trading session's value. Most of the sectors witnessed mixed performance today. Telecommunication sector (+1.2%) was the highest gainer, followed by Paper & Printing (+0.5%) and General Insurance (+0.5%) whereas Ceramics (-1.6%) was the highest loser, followed by Travel & Leisure (-1.5%) and NBFI (-1.4%). BEXIMCO (0.3%) was the highest traded share with a turnover of BDT 537.6 million followed by BRACBANK (-0.7%) and KEYACOSMET (+9.2%) respectively. KEYACOSMET (+9.2%) was the today's top gainer while NHFI (-5.7%) was the top loser today.

## Last Six Months Market Movement



## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5859.6	5879.4	-19.8	-0.3%	16.4%
DSES	1360.4	1363.0	-2.6	-0.2%	14.1%
D530	2195.7	2207.6	-11.9	-0.5%	21.2%

Total Scripts	Advanced	Declined	Unchanged
330	122	184	32

Market Indicators	Today	Last day	Today	Last day
Market PE	16.39	16.40	Market RSI (14)	58.0
				60.0

Market Statistics	Today	Last day	Change (%)
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Market Cap	Mn BDT	4,059,237	4,063,244	(4,008)	-0.10%
	Mn USD	48,906	48,955	(48)	

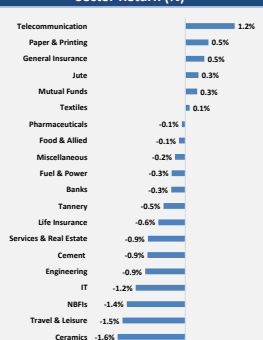
Turnover	Mn BDT	7,110	6,915	194	2.81%
	Mn USD	85.7	83.3	2.3	

Volume	Mn Shares	236.5	209.4	27.1	13%
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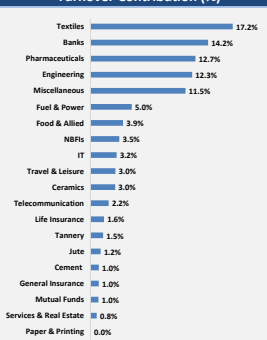
## Sector Review

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	941.8	14.2%	24.3%	637,896	18.2%	-0.3%	10.1
Cement	7	67.3	1.0%	-48.3%	124,062	3.5%	-0.9%	48.6
Ceramics	5	198.3	3.0%	18.6%	27,824	0.8%	-1.6%	21.7
Engineering	35	814.1	12.3%	-19.5%	195,771	5.6%	-0.9%	19.5
Food & Allied	18	260.8	3.9%	-5.2%	280,623	8.0%	-0.1%	27.2
Fuel & Power	18	330.7	5.0%	-31.7%	365,070	10.4%	-0.3%	11.8
General Insurance	35	66.8	1.0%	82.6%	40,567	1.2%	0.5%	11.7
IT	8	209.8	3.2%	1.9%	16,159	0.5%	-1.2%	21.4
Jute	3	81.3	1.2%	86.6%	1,719	0.0%	0.3%	417.0
Life Insurance	12	108.5	1.6%	-28.6%	52,221	1.5%	-0.6%	n/m
Miscellaneous	12	760.7	11.5%	-1.2%	98,456	2.8%	-0.2%	27.1
Mutual Funds	36	64.0	1.0%	3.2%	42,358	1.2%	0.3%	10.0
NBFIs	23	231.3	3.5%	-9.2%	218,142	6.2%	-1.4%	14.5
Paper & Printing	2	2.8	0.0%	-68.0%	1,989	0.1%	0.5%	n/m
Pharmaceuticals	28	840.2	12.7%	10.3%	547,336	15.6%	-0.1%	19.5
Services & Real Estate	4	50.4	0.8%	-6.2%	21,403	0.6%	-0.9%	17.3
Tannery	6	101.5	1.5%	-43.5%	26,432	0.8%	-0.5%	17.1
Telecommunication	2	145.7	2.2%	146.5%	664,232	18.9%	1.2%	24.2
Textiles	48	1138.6	17.2%	13.9%	119,604	3.4%	0.1%	17.0
Travel & Leisure	4	199.7	3.0%	63.8%	24,706	0.7%	-1.5%	31.3

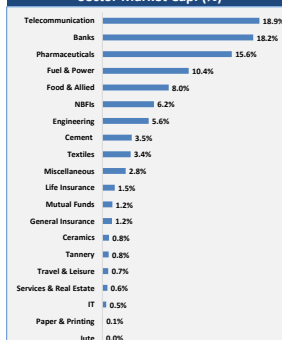
## Sector Return (%)



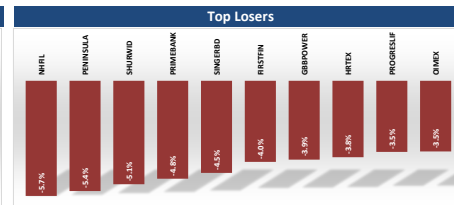
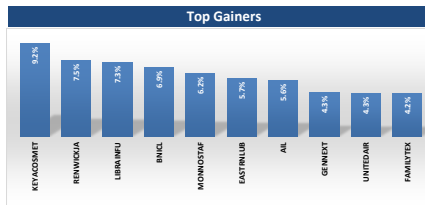
## Turnover Contribution (%)



## Sector Market Cap. (%)



Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
BEXIMCO	30.7	0.3%	537.6	8.1%
BRACBANK	106.1	-0.7%	301.3	4.6%
KEYACOSMET	10.7	9.2%	292.1	4.4%
UNIQUEHRL	59.2	-2.1%	170.1	2.6%
ALIF	13.3	0.0%	169.7	2.6%
GENNEXT	9.6	4.3%	146.1	2.2%
MONNOCCERA	154.4	-0.2%	143.4	2.2%
GP	480.3	1.2%	140.9	2.1%
MERCANBANK	23.1	2.2%	129.1	2.0%
IFADAUTOS	124.1	-0.8%	124.4	1.9%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	480.3	1.2%	648,549	18.5%
SOLPHARMA	316.8	0.0%	233,605	6.7%
BATBC	3361.8	-0.2%	201,708	5.8%
ICB	143	-1.9%	95,017	2.7%
BRACBANK	106.1	-0.7%	91,034	2.6%
RENATA	1248	0.1%	87,399	2.5%
LHBL	60.1	-1.2%	69,799	2.0%
UPGDCL	165.5	-0.9%	66,074	1.9%
OLYMPIC	273	0.1%	54,583	1.6%
BERGERPBL	2096.8	-0.2%	48,623	1.4%

Upcoming Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
UCB	10%C	11.04.2018	30.04.2018	
BRACBANK	25%K	11.04.2018	26.04.2018	
MERCANBANK	17%K & 5%B	15.04.2018	30.04.2018	
BRACBANK	25%B	11.04.2018	26.04.2018	
UNITEDINS	11%C	15.04.2018	03.05.2018	
FAFIN	10%B	19.04.2018	20.06.2018	

Performances of World Stock Indices				
Indices	Country	Index Value	Change	Change (%)
DIA	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

#### ALARABANK: Dividend Declaration

The Board of Directors has recommended 15% cash and 5% stock dividend for the year ended on December 31, 2017. Date of AGM: 24.05.2018, Time: 11:30 AM. Venue: Own Premises, 63/1, Purana Paltan (Beside of Al-Arafah Tower), Dhaka - 1000. Record Date: 03.05.2018. The Company has also reported Consolidated EPS of Tk. 3.15, Consolidated NAV per share of Tk. 20.87 and Consolidated NOCFPS of Tk. 10.40 for the year ended on December 31, 2017 as against Tk. 3.07, Tk. 19.72 and Tk. 11.18 respectively for the same period of the previous year.

#### QUEENSOUTH: Appointment of new CEO of the Company

The Company has informed that Mr. Liang Chin-Hsien has joined the Company as the CEO of the Company on April 09, 2018. Earlier Mr. Rathindra Kumar Chowdhury MBE has resigned from the post of CEO with effect from April 08, 2018.

Comodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (5/barrel)	64.2	1.2%	42.6	66.7
Gold (5/Ounce)	1338.3	-0.1%	1204.0	1365.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.2	102.6	117.8	1.3	64.3

\*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](http://www.dsebd.org), [www.bloomberg.com](http://www.bloomberg.com), [www.finance.yahoo.com](http://www.finance.yahoo.com), <http://money.cnn.com>, <https://fx-rate.net>

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