

# BASL Daily Market Commentary

Wednesday, July 11, 2018

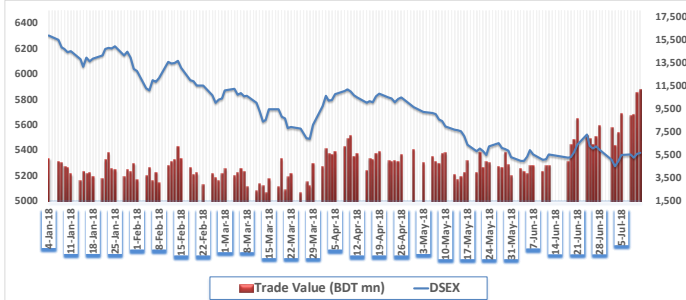
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
info@basl-bd.com, Tel- 9515826-2, www.basl-bd.com



## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index advanced by 7.9 points or 0.1% and closed at 5379.2 points today. Today the blue-chip index DS30 closed in green and closed at 1915.3 and the shariah based index DSES closed in red closed at 1267.0. Turnover stood at BDT 11153 million (USD 134.4 million), about +2.49% higher than the previous trading session's value. Most of the sectors witnessed bearish performance today. Ceramics sector (+2.9%) was the highest gainer, followed by NBFIs (+1.4%) and General Insurance (+1.3%) respectively, whereas IT (-3.0%) was the highest loser, followed by Jute (-2.4%) and Paper & Printing (-2.1%). PENINSULA (+9.8%) was the highest traded share with a turnover of BDT 342.8 million followed by RSRMSTEEL (+1.1%) and BBSCABLES (+5.5%) respectively. Engineering sector has highest turnover of 19.7% in the market. QUEENSOUTH (+10.0%) was the today's top gainer while AZIZPIPES (-8.4%) was the top loser today.

## Last Six Months Market Movement



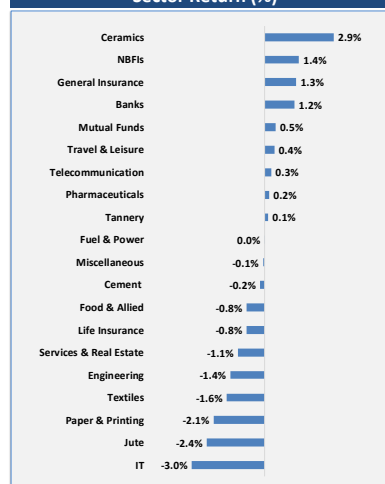
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5379.2	5371.3	7.9	0.1%	-13.9%
DSES	1267.0	1271.0	-4.0	-0.3%	-8.9%
DS30	1915.3	1911.9	3.5	0.2%	-16.1%
Total Scripts					
	330	153	157	31	
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	16.7	16.1	Market RSI (14)	48.40	47.53
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,858,117	3,857,048	1,069	0.03%
	Mn USD	46,483	46,470	13	
Turnover	Mn BDT	11,153	10,882	271	2.49%
	Mn USD	134.4	131.1	3.3	
Volume	Mn Shares	307.9	292.2	15.7	5%

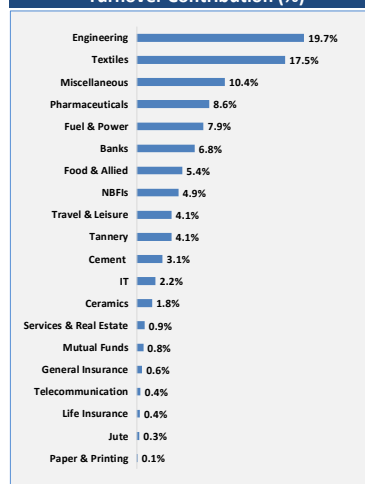
## Sector Review

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	694.6	6.8%	36.1%	534,664	16.5%	1.2%	11.3
Cement	7	311.4	3.1%	46.6%	119,363	3.7%	-0.2%	38.2
Ceramics	5	184.3	1.8%	-24.3%	32,555	1.0%	2.9%	27.1
Engineering	35	2011.8	19.7%	-20.0%	197,499	6.1%	-1.4%	18.7
Food & Allied	18	548.9	5.4%	13.0%	266,115	8.2%	-0.8%	19.7
Fuel & Power	18	802.8	7.9%	4.7%	419,515	13.0%	0.0%	13.9
General Insurance	35	64.4	0.6%	-1.8%	37,985	1.2%	1.3%	10.0
IT	8	225.2	2.2%	-34.7%	15,709	0.5%	-3.0%	18.4
Jute	3	31.0	0.3%	-1.6%	1,689	0.1%	-2.4%	340.9
Life Insurance	12	36.1	0.4%	-47.8%	47,337	1.5%	-0.8%	n/m
Miscellaneous	12	1057.5	10.4%	22.2%	78,519	2.4%	-0.1%	19.6
Mutual Funds	36	78.5	0.8%	-9.0%	40,885	1.3%	0.5%	11.9
NBFIs	23	502.4	4.9%	64.1%	204,888	6.3%	1.4%	17.2
Paper & Printing	2	8.2	0.1%	-47.1%	2,090	0.1%	-2.1%	n/m
Pharmaceuticals	28	871.6	8.6%	-12.6%	510,311	15.8%	0.2%	18.5
Services & Real Estate	4	93.5	0.9%	-22.5%	20,416	0.6%	-1.1%	16.7
Tannery	6	417.8	4.1%	96.2%	27,306	0.8%	0.1%	25.0
Telecommunication	2	44.6	0.4%	-50.3%	530,187	16.4%	0.3%	20.7
Textiles	48	1784.9	17.5%	-19.7%	128,511	4.0%	-1.6%	19.8
Travel & Leisure	4	419.1	4.1%	394.2%	22,961	0.7%	0.4%	30.5

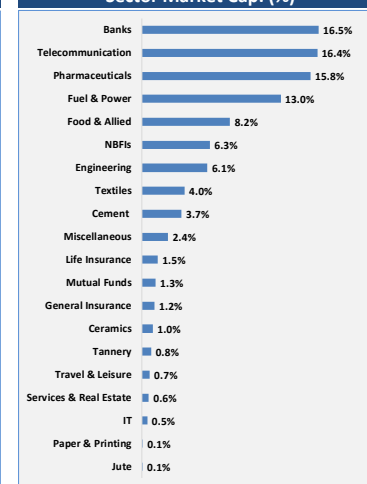
## Sector Return (%)



## Turnover Contribution (%)



## Sector Market Cap. (%)



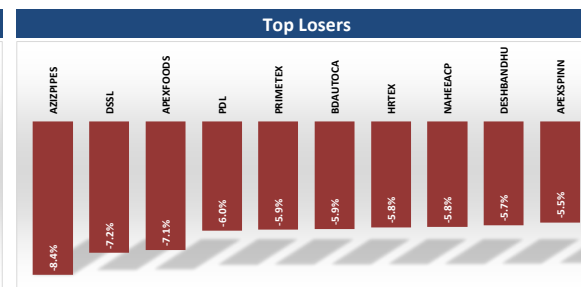
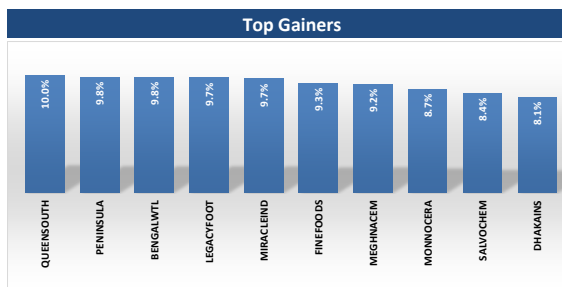
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
PENINSULA	31.4	9.8%	342.8	3.2%
RSRMSTEEL	69.3	-1.1%	322.8	3.0%
BBSCABLES	85	-5.5%	314.4	3.0%
BEXIMCO	27.4	0.7%	305.3	2.9%
LEGACYFOOT	159.9	9.7%	254.7	2.4%
UPGDCL	301.6	-0.3%	247.7	2.3%
MIRACLEIND	53.4	9.7%	236.6	2.2%
CONFIDCEM	183.1	4.8%	220.8	2.1%
BRACBANK	63.9	-0.6%	168.7	1.6%
SINOBANGLA	69.2	-1.8%	156.1	1.5%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	380.7	0.3%	514,059	15.9%
SQURPHARMA	283.8	-0.3%	209,272	6.5%
BATBC	3296.4	-1.0%	197,784	6.1%
UPGDCL	301.6	-0.3%	120,411	3.7%
ICB	144.7	1.0%	96,146	3.0%
RENATA	1251.3	-0.2%	87,630	2.7%
BRACBANK	63.9	-0.6%	68,533	2.1%
LHBL	55.8	-0.7%	64,805	2.0%
OLYMPIC	221	0.5%	44,186	1.4%
SUMITPOWER	38.5	1.3%	41,113	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings			
Scrip	Declaration	Record Date	AGM Date
JANATAINS	5% S	31.07.2018	04.09.2018

Performances of World Stock Indices				
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

### RAKCERAMIC: 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 17, 2018 at 5:30 PM to consider, among others, un-audited financial statements of the Company for the Second Quarter (Q2) period ended on June 30, 2018.

### BERGERPBL: 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 17, 2018 at 3:00 PM to consider, among others, un-audited financial statements of the Company for the First Quarter (Q1) period ended on June 30, 2018.

Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	73.5	-0.8%	43.8	75.3
Gold (\$/Ounce)	1251.8	-0.3%	1207.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.4	97.8	110.7	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).

## BASL Research Team

*Mr. Shariful Alam Chowdhury*  
Head of Research & Investments

*tushar@basl-bd.com, tusharbd@bloomberg.net*

*Mr. Shohidul Islam*  
Research Analyst

*shohidul@basl-bd.com, shohidulbd@bloomberg.net*

*Mr. Monir Hossain*  
Research Associate

*monir@basl-bd.com*

*Mr. Md. Monirul Islam*  
Research Associate

*abir@basl-bd.com*

## BASL Branches

<b>Head Office</b> Hadi Mansion (7th Floor) 2, Dilkusha Commercial Area Dhaka-1000, Bangladesh Phone: +88-02-9515826-28 Fax: +88-02-9567884	<b>Modhumita Extension Office</b> 158-160 Modhumita Building (5th Floor) Motijheel C/A, Dhaka-1000 Phone: +88-01819118893	<b>Dhanmondi Branch</b> Meher Plaza (1st Floor), House # 13/A, Road # 05 Dhanmondi, Dhaka - 1207 Phone: +8802-8624874-5	<b>Mirpur Branch</b> Nishi Plaza, plot # 01, Avenue-04, Section-06, Block-C Mirpur, Dhaka - 1216 Phone: +88-02-9013841	<b>Uttara Branch</b> House # 79/A, (4th Floor), Road # 07, Sector # 04 Uttara Model Town, Dhaka-1230 Phone: +88-02-8958371	<b>Banani Branch</b> Nur Empori, Plot # 77 (1st Floor), Road No # 11, Banani, Dhaka-1213 Phone: +8801716180767	<b>Khulna Branch</b> 28, Sir Iqbal Road (1st Floor) Khulna Phone: +88-041-731208-9
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For International Trade & Sales, please contact **Mr. Sumon Das, Chief Executive Officer**. Please call at +8801993111666, +880 02 9515826, Ext:101 at Business hour.

For further query, write to us at [research@basl-bd.com](mailto:research@basl-bd.com).