

BASL Daily Market Commentary

Thursday, July 12, 2018

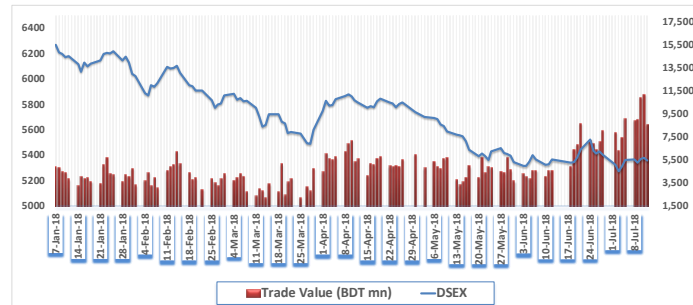
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000
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Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index declined by 20.3 points or 0.4% and closed at 5358.9 points today. Today the blue-chip index DS30 closed in red and closed at 1906.8 and the shariah based index DSES closed in green closed at 1267.4. Turnover stood at BDT 8530 million (USD 102.8 million), about -23.52% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Fuel & Power sector (+2.7%) was the highest gainer, followed by Telecommunication (+1.9%) and Travel & Leisure (+1.1%) respectively, whereas IT (-2.3%) was the highest loser, followed by Service & Real Estate (-1.7%) and General Insurance (-1.2%). SINGERBD (+10.0%) was the highest traded share with a turnover of BDT 436.4 million followed by UPGDCL (+8.4%) and KDSALTD (+10.0%) respectively. Engineering sector has highest turnover of 25.7% in the market. KDSALTD (+10.0%) was the today's top gainer while BDAUTOCA (-8.7%) was the top loser today.

Last Six Months Market Movement



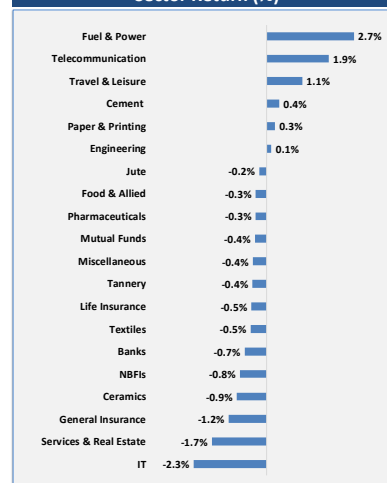
Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5358.9	5379.2	-20.3	-0.4%	-14.2%
DSES	1267.4	1267.0	0.4	0.0%	-8.9%
DS30	1906.8	1915.3	-8.6	-0.4%	-16.5%
Total Scripts					
	330	91	222	25	
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	16.6	16.7	Market RSI (14)	48.40	48.40
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,868,774	3,858,117	10,657	0.28%
	Mn USD	46,612	46,483	128	
Turnover	Mn BDT	8,530	11,153	(2,623)	-23.52%
	Mn USD	102.8	134.4	(31.6)	
Volume	Mn Shares	186.5	307.9	(121.4)	-39%

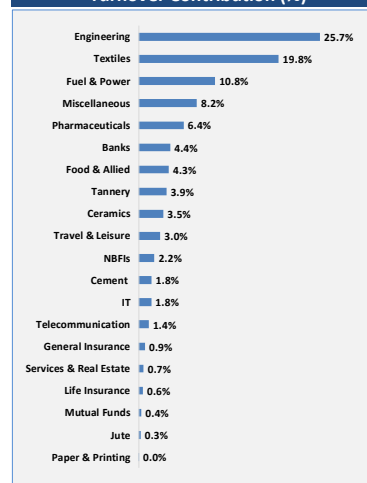
Sector Review

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	356.8	4.4%	-48.6%	530,954	16.3%	-0.7%	11.0
Cement	7	146.2	1.8%	-53.0%	119,823	3.7%	0.4%	38.3
Ceramics	5	278.8	3.5%	51.3%	32,250	1.0%	-0.9%	26.8
Engineering	35	2058.6	25.7%	2.3%	197,787	6.1%	0.1%	18.7
Food & Allied	18	341.7	4.3%	-37.7%	265,207	8.2%	-0.3%	19.7
Fuel & Power	18	865.2	10.8%	7.8%	430,947	13.3%	2.7%	14.3
General Insurance	35	69.7	0.9%	8.2%	37,534	1.2%	-1.2%	9.9
IT	8	143.1	1.8%	-36.5%	15,349	0.5%	-2.3%	18.0
Jute	3	20.2	0.3%	-35.0%	1,685	0.1%	-0.2%	340.2
Life Insurance	12	46.7	0.6%	29.3%	47,109	1.5%	-0.5%	n/m
Miscellaneous	12	661.5	8.2%	-37.4%	78,179	2.4%	-0.4%	19.5
Mutual Funds	36	28.9	0.4%	-63.1%	40,735	1.3%	-0.4%	11.9
NBFIs	23	178.1	2.2%	-64.5%	203,171	6.3%	-0.8%	17.1
Paper & Printing	2	2.3	0.0%	-71.4%	2,095	0.1%	0.3%	n/m
Pharmaceuticals	28	510.4	6.4%	-41.4%	506,509	15.6%	-0.3%	18.4
Services & Real Estate	4	53.8	0.7%	-42.4%	20,065	0.6%	-1.7%	16.4
Tannery	6	314.2	3.9%	-24.8%	27,184	0.8%	-0.4%	24.9
Telecommunication	2	113.4	1.4%	154.2%	540,472	16.6%	1.9%	21.1
Textiles	48	1588.6	19.8%	-11.0%	127,861	3.9%	-0.5%	19.7
Travel & Leisure	4	244.5	3.0%	-41.7%	23,216	0.7%	1.1%	30.8

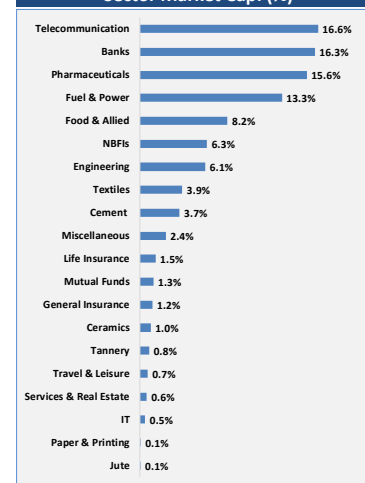
Sector Return (%)



Turnover Contribution (%)



Sector Market Cap. (%)



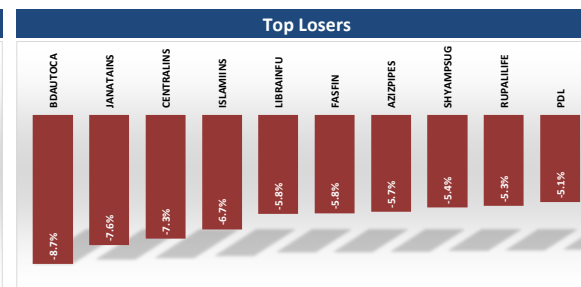
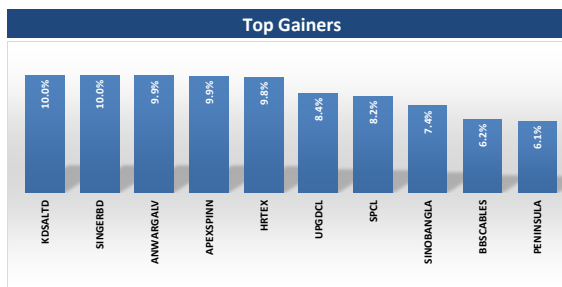
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
SINGERBD	207.5	10.0%	436.4	5.3%
UPGDCL	327	8.4%	390.7	4.7%
KDSALTD	83.8	10.0%	251.3	3.1%
BBSCABLES	90.3	6.2%	241.7	2.9%
MONNOCERA	341.1	2.0%	239.6	2.9%
LEGACYFOOT	152.3	-4.8%	229.8	2.8%
QUEENSOUTH	66.1	5.1%	207.8	2.5%
PTL	55.4	1.3%	192.2	2.3%
PENINSULA	33.3	6.1%	183.8	2.2%
ANWARGALV	111.9	9.9%	170.6	2.1%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	388.5	2.0%	524,592	16.1%
SQURPHARMA	281.9	-0.7%	207,871	6.4%
BATBC	3293.9	-0.1%	197,634	6.1%
UPGDCL	327	8.4%	130,551	4.0%
ICB	143.2	-1.0%	95,150	2.9%
RENATA	1248.9	-0.2%	87,462	2.7%
BRACBANK	64	0.2%	68,640	2.1%
LHBL	55.7	-0.2%	64,689	2.0%
OLYMPIC	217.9	-1.4%	43,567	1.3%
SUMITPOWER	38.8	0.8%	41,434	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 (%)
JANATAINS	5% S	31.07.2018	04.09.2018	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

SHAHJABANK: Buy Intimation

Artistic Design Ltd. (where Mr. A.K. Azad is the MD of Artistic Design Ltd. and also a Sponsor Director of Shahjalal Islami Bank Limited), has expressed its intention to buy 10,00,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchanges (DSE & CSE) within next 30 working days.

AGRANINS: Buy declaration of a Sponsor Director

Mr. Abdul Kader Khan, one of the Sponsors Directors of the Company, has expressed his intention to buy 75,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	71.1	1.0%	45.0	75.3
Gold (\$/Ounce)	1245.4	0.1%	1213.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.8	97.8	110.6	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 2 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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