

# BASL Daily Market Commentary

Tuesday, June 26, 2018

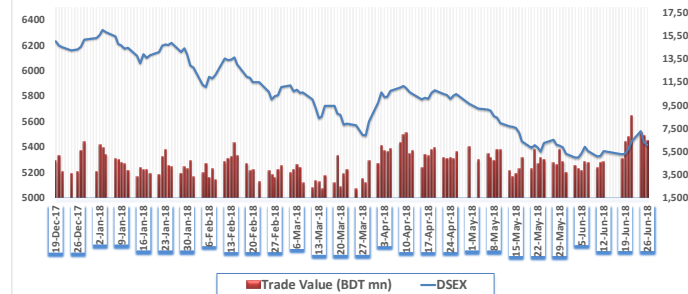
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
info@basl-bd.com, Tel- 9515826-2, www.basl-bd.com



## Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index declined by 22.5 points or 0.4% and closed at 5411.3 points today. The blue-chip index DS30 and the shariah based index DSES closed in red closing to 1965.7 and 1259.8 respectively. Turnover stood at BDT 6394 million (USD 77.0 million), about -6.80% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Travel & Leisure (+4.4%) was the highest gainer, followed by Paper & Printing (+3.1%) and IT (+2.2) respectively, whereas NBFIs (-1.7%) was the highest loser, followed by Service & Real Estate (-1.5%) and Telecommunication (-1.5%). RSRMSTEEL (+7.2%) was the highest traded share with a turnover of BDT 435.6 million followed by MONNOCERA (+3.2%) and GP (-1.4%) respectively. Engineering sector has highest turnover of 22.8% in the market. POPULARLIFE (+10.0%) was the today's top gainer while BDFINANCE (-7.7%) was the top loser today.

## Last Six Months Market Movement



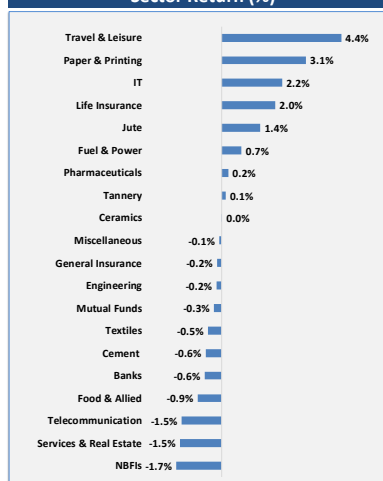
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5411.3	5433.8	-22.5	-0.4%	-13.3%
DSES	1259.8	1263.5	-3.7	-0.3%	-9.4%
DS30	1965.7	1977.0	-11.4	-0.6%	-13.9%
Total Scripts		Advanced	Declined	Unchanged	
330		102	196	39	
Market Indicators	Today	Last day		Today	Last day
Market PE	16.7	16.8	Market RSI (14)		47.57 45.78
Market Statistics		Today	Last day Change		Change (%)
Market Cap	Mn BDT	3,844,851	3,859,772 (14,921)		-0.39%
	Mn USD	46,324	46,503 (180)		
Turnover	Mn BDT	6,394	6,861 (467)		-6.80%
	Mn USD	77.0	82.7 (5.6)		
Volume	Mn Shares	133.6	163.5 (29.9)		-18%

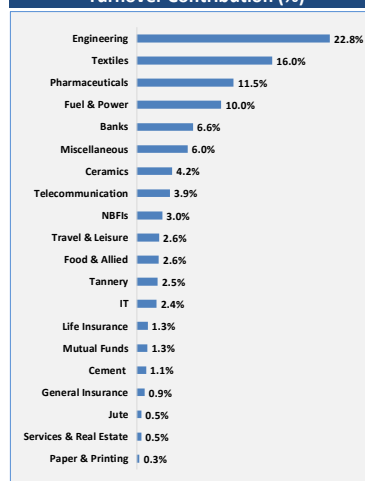
## Sector Review

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	360.4	6.6%	-35.6%	561,366	17.3%	-0.6%	11.8
Cement	7	59.3	1.1%	0.5%	115,118	3.5%	-0.6%	36.8
Ceramics	5	228.2	4.2%	-7.2%	29,125	0.9%	0.0%	24.2
Engineering	35	1239.0	22.8%	10.2%	190,230	5.9%	-0.2%	18.0
Food & Allied	18	141.5	2.6%	-54.2%	273,203	8.4%	-0.9%	20.3
Fuel & Power	18	542.4	10.0%	-13.5%	401,865	12.4%	0.7%	13.3
General Insurance	35	49.7	0.9%	8.4%	37,554	1.2%	-0.2%	9.9
IT	8	128.2	2.4%	47.2%	14,818	0.5%	2.2%	17.4
Jute	3	29.2	0.5%	46.7%	1,680	0.1%	1.4%	339.1
Life Insurance	12	69.7	1.3%	24.3%	49,470	1.5%	2.0%	n/m
Miscellaneous	12	326.3	6.0%	-34.0%	75,999	2.3%	-0.1%	19.0
Mutual Funds	36	68.5	1.3%	19.8%	40,712	1.3%	-0.3%	11.9
NBFIs	23	164.1	3.0%	-43.8%	201,048	6.2%	-1.7%	16.6
Paper & Printing	2	17.6	0.3%	118.8%	2,125	0.1%	3.1%	n/m
Pharmaceuticals	28	622.3	11.5%	-4.4%	516,765	15.9%	0.2%	18.8
Services & Real Estate	4	28.1	0.5%	-5.6%	19,057	0.6%	-1.5%	15.5
Tannery	6	134.8	2.5%	4.5%	26,049	0.8%	0.1%	23.8
Telecommunication	2	212.5	3.9%	-5.1%	553,178	17.0%	-1.5%	21.6
Textiles	48	868.3	16.0%	-24.6%	117,316	3.6%	-0.5%	18.0
Travel & Leisure	4	142.9	2.6%	182.7%	23,114	0.7%	4.4%	30.7

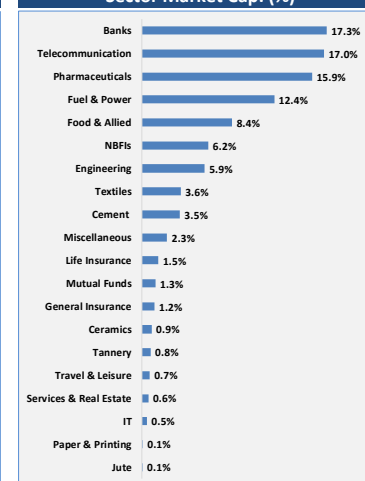
## Sector Return (%)



## Turnover Contribution (%)



## Sector Market Cap. (%)



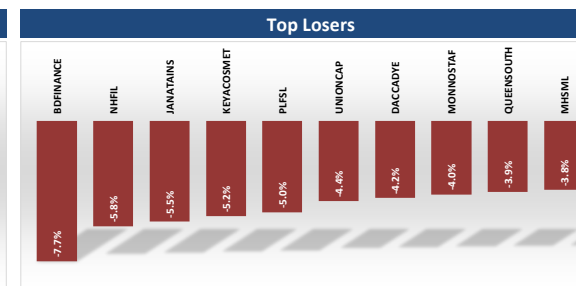
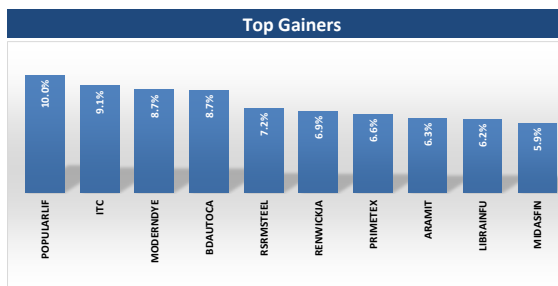
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
RSRMSTEEL	65.5	7.2%	435.6	8.0%
MONNOCERA	278.2	3.2%	213.5	3.9%
GP	397.8	-1.4%	200.8	3.7%
UPGDCL	263.6	3.4%	177.0	3.3%
PTL	53.3	-2.0%	174.1	3.2%
AIL	101.8	0.8%	136.7	2.5%
UNIQUEHRL	55.8	5.7%	131.6	2.4%
BEXIMCO	26.5	-1.5%	113.7	2.1%
MONNOSTAF	3306.8	-4.0%	96.5	1.8%
KEYACOSMET	9.1	-5.2%	87.4	1.6%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	397.8	-1.4%	537,149	16.5%
SQURPHARMA	291.6	-0.2%	215,023	6.6%
BATBC	3419.9	-0.7%	205,194	6.3%
UPGDCL	263.6	3.4%	105,239	3.2%
ICB	136.9	-2.2%	90,964	2.8%
RENATA	1254.3	1.4%	87,840	2.7%
BRACBANK	71.5	-1.1%	76,684	2.4%
LHBL	55.5	-0.2%	64,456	2.0%
OLYMPIC	224.5	-2.0%	44,886	1.4%
TITASGAS	40.3	2.0%	39,866	1.2%

Upcoming Record Date & AGM date for Dividends/Right Offerings			
Scrip	Declaration	Record Date	AGM Date

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

### SIBL: Sale Declaration of a Sponsor

Mr. Md. Amin Uddin, one of the Sponsors of the Company, has expressed his intention to sell 15,00,000 shares out of his total holding of 1,47,66,096 shares of the Company at prevailing market price (In the Public Market) through Stock Exchanges (DSE & CSE) within next 30 working days.

Comodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	68.4	0.5%	42.6	72.9
Gold (\$/Ounce)	1261.0	-0.6%	1204.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.7	97.7	111.0	1.2	62.0

\*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

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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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