

# BASL Daily Market Commentary

Tuesday, May 29, 2018

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

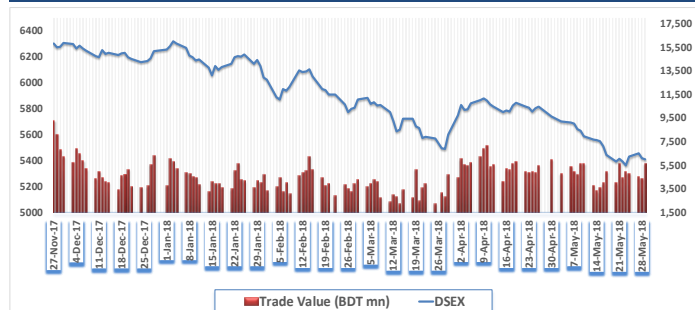


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## Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index declined by 7.7 points or -0.1% and closed at 5409.7 points today. The blue-chip index DS30 and the shariah based index DSES both closed in red closing to 2006.0 and 1253.9 respectively. Turnover stood at BDT 5644 million (USD 68.0 million), about 30.74% lower than the previous trading session's value. Most of the sectors witnessed bullish performance today. Jute Sector (+2.9%) was the highest gainer, followed by Travel & Leisure (+1.6) & Miscellaneous (+1.1) whereas Telecommunication was the highest loser, followed by NBFI (-0.7%) and General Insurance (-0.5%). BEXIMCO (+9.8%) was the highest traded share with a turnover of BDT 315.5 million followed by MONNOCERA (+7.2%) and NAHEEACP (+9.6%) respectively. Textiles sector has highest turnover of 18.8% in the market. AIL (+10.0%) was the today's top gainer while CENTRALINS (-8.6%) was the top loser today.

## Last Six Months Market Movement



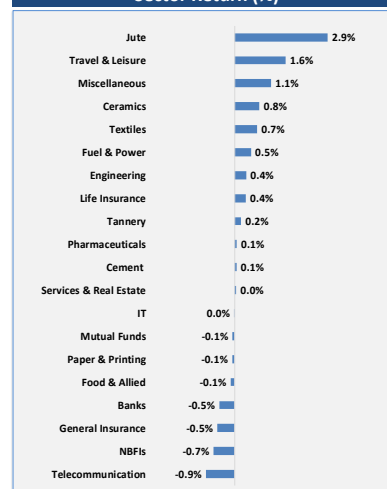
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5409.7	5417.4	-7.7	-0.1%	-13.4%
DSES	1253.9	1257.5	-3.5	-0.3%	-9.8%
DS30	2006.0	2011.4	-5.4	-0.3%	-12.1%
Total Scrips					
	330	138	151	45	
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	17.1	17.1	Market RSI (14)	32.40	32.97
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,837,974	3,844,744	(6,770)	-0.18%
	Mn USD	46,241	46,322	(82)	
Turnover	Mn BDT	5,644	4,317	1,327	30.74%
	Mn USD	68.0	52.0	16.0	
Volume	Mn Shares	130.9	113.6	17.2	15%

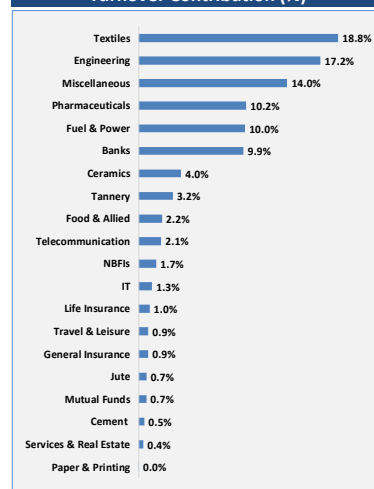
## Sector Review

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	514.9	9.9%	-18.4%	569,290	17.4%	-0.5%	12.8
Cement	7	27.8	0.5%	-2.7%	114,611	3.5%	0.1%	36.9
Ceramics	5	208.6	4.0%	176.7%	25,681	0.8%	0.8%	21.4
Engineering	35	892.8	17.2%	44.0%	186,380	5.7%	0.4%	17.6
Food & Allied	18	114.8	2.2%	15.9%	274,589	8.4%	-0.1%	20.4
Fuel & Power	18	521.6	10.0%	-6.6%	372,228	11.4%	0.5%	12.4
General Insurance	35	46.8	0.9%	2.2%	38,957	1.2%	-0.5%	10.3
IT	8	66.2	1.3%	35.4%	14,785	0.5%	0.0%	17.4
Jute	3	37.9	0.7%	93.0%	1,667	0.1%	2.9%	336.5
Life Insurance	12	54.1	1.0%	5.6%	48,306	1.5%	0.4%	n/m
Miscellaneous	12	729.6	14.0%	53.3%	104,011	3.2%	1.1%	26.0
Mutual Funds	36	37.7	0.7%	5.0%	41,155	1.3%	-0.1%	12.0
NBFIs	23	86.7	1.7%	-7.3%	191,398	5.8%	-0.7%	15.9
Paper & Printing	2	1.1	0.0%	6.6%	1,704	0.1%	-0.1%	n/m
Pharmaceuticals	28	527.4	10.2%	46.8%	514,507	15.7%	0.1%	18.7
Services & Real Estate	4	22.2	0.4%	9.3%	19,259	0.6%	0.0%	15.7
Tannery	6	167.4	3.2%	-2.8%	25,752	0.8%	0.2%	23.6
Telecommunication	2	111.2	2.1%	-10.3%	592,044	18.1%	-0.9%	23.1
Textiles	48	978.9	18.8%	40.5%	115,161	3.5%	0.7%	17.7
Travel & Leisure	4	47.2	0.9%	11.4%	22,119	0.7%	1.6%	29.4

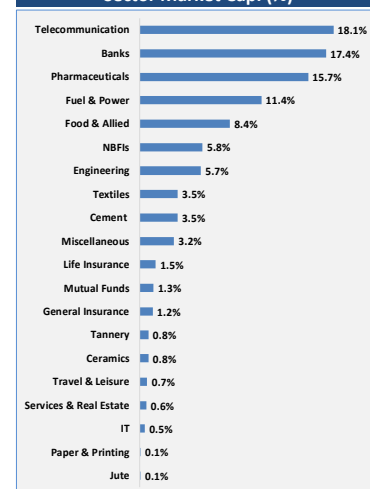
## Sector Return (%)



## Turnover Contribution (%)



## Sector Market Cap. (%)



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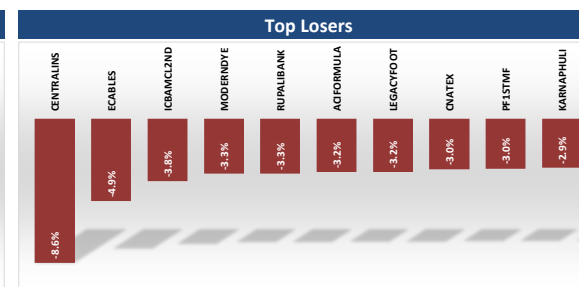
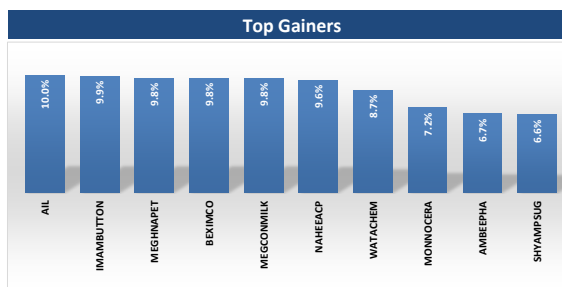
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
BEXIMCO	28.1	9.8%	315.5	6.1%
MONNOCERA	158.3	7.2%	196.7	3.8%
NAHEEACP	52.4	9.6%	188.1	3.6%
AIL	93.5	10.0%	170.6	3.3%
MIRACLEIND	48.1	-1.4%	160.7	3.1%
ALARABANK	24.2	1.3%	136.8	2.6%
BSRMLTD	106.4	1.3%	127.4	2.5%
QUEENSOUTH	56.9	1.1%	117.4	2.3%
BERGERPBL	2511.1	-1.4%	113.0	2.2%
SHEPHERD	31.6	-1.6%	111.2	2.1%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	428	-0.9%	577,928	17.7%
SQURPHARMA	288.4	-1.2%	212,664	6.5%
BATBC	3392	0.0%	203,520	6.2%
RENATA	1230.8	-0.6%	86,194	2.6%
UPGDCL	207.6	1.2%	82,882	2.5%
BRACBANK	77.2	-2.4%	82,797	2.5%
ICB	124.5	-0.5%	82,724	2.5%
LHBL	55.3	-0.4%	64,224	2.0%
BERGERPBL	2511.1	-1.4%	58,230	1.8%
OLYMPIC	241.9	-0.9%	48,365	1.5%

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 (%)
EASTERNINS	20% C	29.05.2018	25.07.2018	DJIA	USA	24,682	-45	-0.2%
NCCBANK	13% C	30.05.2018	30.07.2018	FTSE 100	UK	7,039	-22	-0.3%
PROVATIINS	10% C	30.05.2018	23.07.2018	SENSEX	India	33,133	-3	0.0%
GLOBALINS	5% S	30.05.2018	14.07.2018	Nikkei 225	Japan	21,592	211	1.0%
SHAHJABANK	10% B	31.05.2018	08.07.2018	STI	Singapore	3,507	-4	-0.1%
AIBL1STIMF	8% C	04.06.2018		SSE Comp.	China	3,266	-15	-0.5%
MARICO	600% C	07.06.2018	18.07.2018	NASDAQ Co	USA	7,345	-19	-0.3%
PURABIGEN	12% S	07.06.2018	16.07.2018	NYSE Comp.	USA	12,684	20	0.2%
PEOPLESINS	10% C	19.06.2018	01.08.2018					

## Today's News Cut

### MTB: Buy Declarations of Sponsor Director

Mr. Md. Abdul Malek, one of the Sponsors Directors and Mr. Rashed Ahmed Chowdhury, one of the Directors (nominated from Associated Builders Corporation Ltd.) of the Company, have expressed their intentions to buy 1,00,000 shares each of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

### SHAHJABANK: Credit Rating Result

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the Surveillance Rating of the Company as "AA2" in the long term and "ST-2" in the short term along with a stable outlook in consideration of audited financial statements of the Company as of December 31, 2017 and other relevant quantitative as well as qualitative information up to the date of rating declaration.

Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	66.7	-1.7%	42.6	72.9
Gold (\$/Ounce)	1298.2	-0.4%	1204.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.4	96.6	110.6	1.2	62.9

\*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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