

# BASL Daily Market Commentary

Tuesday, April 2, 2019

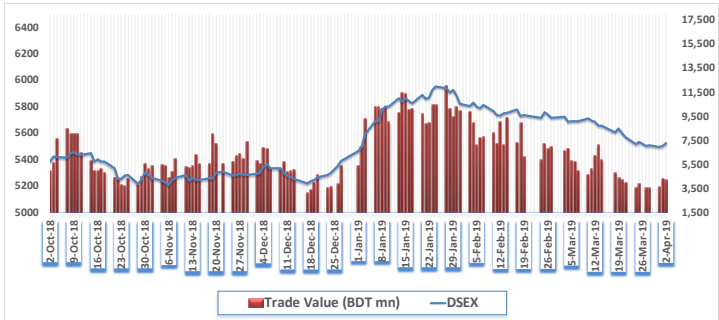
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
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## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 19.1 points or 0.3% and closed at 5522.2 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1977.5 and 1281.2 respectively. Turnover stood at BDT million 4125 (USD 49.7 million), about 2.7% lower than the previous trading session's value. Most of the sectors witnessed bullish performance today. Paper & Printing Sector (+2.8%) was the highest gainer followed by Miscellaneous (+1.8%) and Tannery Sector (+1.8%) respectively whereas Telecommunication Sector (-1.7%) was the highest loser followed by Jute (-0.4%) and Services & Real Estate Sector (-0.2%) respectively. UPGDCL (+0.1%) was the highest traded share with a turnover of BDT 380.6 million followed by MONNOCERA (+0.2%) and BATBC (+1.5%) respectively. Banks sector has highest turnover of 16.6% in the market. UNITEDINS (+9.9%) was the today's top gainer while ARAMITCEM (-5.7%) was the top loser today.

## Last Six Months Market Movement



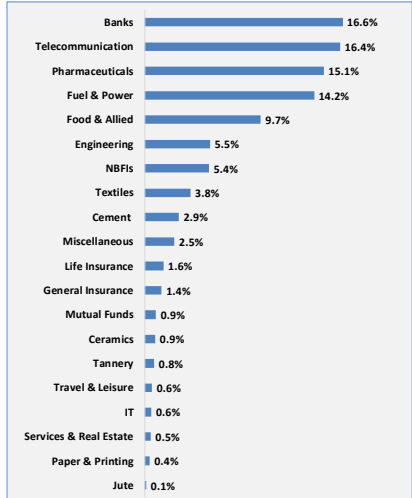
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5522.2	5503.1	19.1	0.3%	-11.6%
DSES	1281.2	1277.7	3.5	0.3%	-7.9%
DS30	1977.5	1971.6	5.9	0.3%	-13.4%
<b>Total Scripts</b>	<b>Advanced</b>	<b>Declined</b>	<b>Unchanged</b>		
	330	183	106	60	
<b>Market Indicators</b>	<b>Today</b>	<b>Last day</b>	<b>Today</b>	<b>Last day</b>	
<b>Market PE</b>	15.97	15.99	<b>Market RSI (14)</b>	34.14	29.84
<b>Market Statistics</b>	<b>Today</b>	<b>Last day</b>	<b>Change</b>	<b>Change (%)</b>	
<b>Market Cap</b>	Mn BDT	4,140,323	4,132,761	7,563	0.18%
	Mn USD	49,883	49,792	91	
<b>Turnover</b>	Mn BDT	4,125	4,240	(114)	-2.70%
	Mn USD	49.7	51.1	(1.4)	
<b>Volume</b>	Mn Shares	90.3	81.0	9.3	11%

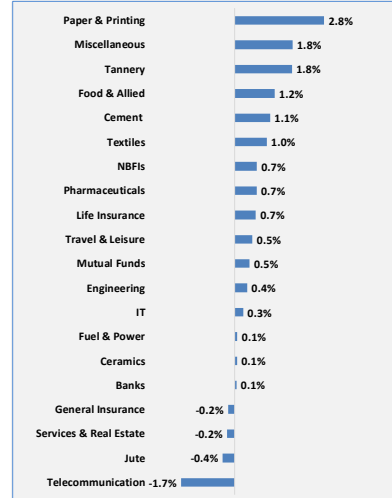
## Sector Review

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	385.0	9.4%	-27.0%	586,874	16.6%	0.1%	10.1
Cement	7	96.7	2.4%	42.7%	101,237	2.9%	1.1%	34.2
Ceramics	5	269.3	6.6%	93.7%	31,122	0.9%	0.1%	19.3
Engineering	36	450.6	11.0%	-3.6%	193,210	5.5%	0.4%	16.6
Food & Allied	17	293.1	7.2%	-30.7%	343,800	9.7%	1.2%	27.1
Fuel & Power	19	612.2	15.0%	-1.1%	502,204	14.2%	0.1%	13.2
General Insurance	35	346.2	8.5%	-9.7%	49,944	1.4%	-0.2%	14.3
IT	8	78.0	1.9%	43.4%	19,489	0.6%	0.3%	19.1
Jute	3	8.3	0.2%	-24.1%	4,409	0.1%	-0.4%	92.8
Life Insurance	12	44.0	1.1%	14.2%	55,612	1.6%	0.7%	n/m
Miscellaneous	13	114.1	2.8%	46.4%	88,356	2.5%	1.8%	26.0
Mutual Funds	37	12.5	0.3%	56.0%	33,271	0.9%	0.5%	12.7
NBFIs	23	202.0	4.9%	92.1%	190,458	5.4%	0.7%	23.1
Paper & Printing	3	13.6	0.3%	11.5%	14,786	0.4%	2.8%	32.2
Pharmaceuticals	31	395.6	9.7%	-7.5%	531,602	15.1%	0.7%	18.7
Services & Real Estate	4	22.5	0.5%	3.3%	17,911	0.5%	-0.2%	16.3
Tannery	6	99.9	2.4%	-11.7%	28,162	0.8%	1.8%	17.0
Telecommunication	2	243.9	6.0%	-37.4%	579,913	16.4%	-1.7%	16.3
Textiles	53	370.8	9.1%	33.3%	135,602	3.8%	1.0%	18.3
Travel & Leisure	4	29.3	0.7%	-6.3%	21,570	0.6%	0.5%	29.3

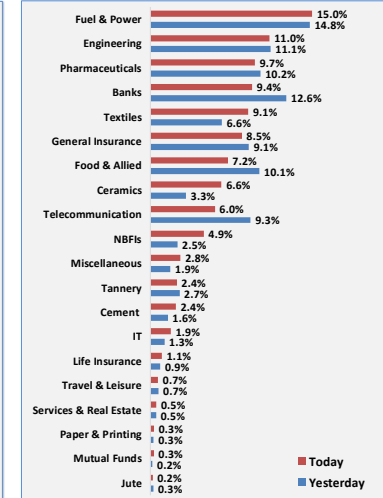
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



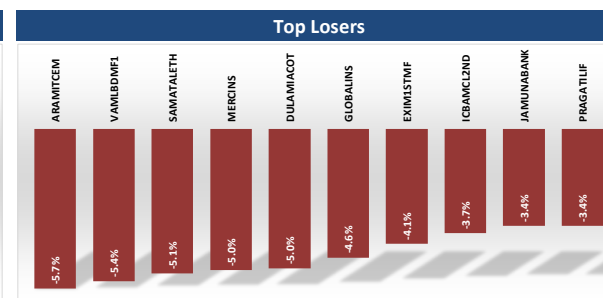
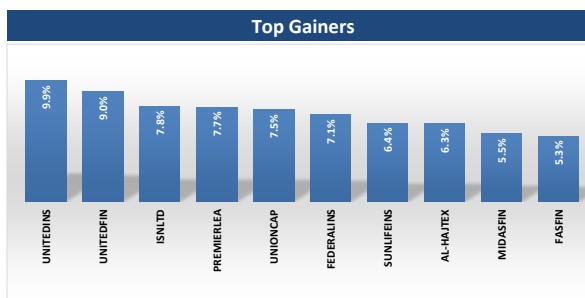
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
UPGDCL	415	0.1%	380.6	9.3%
MONNOCERA	355.6	0.2%	263.9	6.5%
BATBC	4607.4	1.5%	248.6	6.1%
BSCCL	162.7	0.3%	128.9	3.2%
GP	409.6	-1.8%	114.9	2.8%
AIL	71.5	3.0%	110.7	2.7%
JMISMDL	365.4	-0.7%	69.4	1.7%
SHURWID	38.2	-0.8%	68.5	1.7%
SINGERBD	185.6	-1.8%	66.4	1.6%
DUTCHBANGL	214.3	-0.3%	65.5	1.6%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	409.6	-1.8%	553,083	15.7%
BATBC	4607.4	1.5%	276,444	7.8%
SQURPHARMA	268	0.3%	211,454	6.0%
UPGDCL	415	0.1%	198,821	5.6%
RENATA	1172.2	0.0%	94,404	2.7%
BRACBANK	80.2	1.0%	86,015	2.4%
ICB	116.3	-0.5%	81,140	2.3%
LHBL	41.2	0.0%	47,849	1.4%
OLYMPIC	232.9	0.3%	46,566	1.3%
MARICO	1413.6	1.9%	44,528	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings			
Scrip	Declaration	Record Date	AGM Date
DUTCHBANGL	150%\$	07.04.2019	29.04.2019
UNITEDINS	7.05C, 5.95%\$	08.04.2019	28.04.2019
FIRSTSBANK	10%\$	22.04.2019	20.05.2019
PREMIERBAN	15.5%\$	23.04.2019	12.05.2019
BDFINANCE	10%\$	06.05.2019	06.05.2019

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

### BANKASIA: Buy Declaration of a Sponsor Director

Mr. Rume A Hossain, one of the Sponsors and Directors of the Company, has expressed his intention to buy 3,00,000 shares of the Company at prevailing market price (In the Public market) through Stock Exchange (DSE) within next 30 working days.

### RDFOOD: Sale & Buy Declarations of Sponsor Director

Mr. S.M. Fakhar-Uz-Zaman, one of the Sponsors of the Company, has expressed his intention to sell 9,25,000 shares out of his total holding of 55,85,406 shares whereas Concrete and Steel Technologies Limited, a Corporate Director of the Company, has expressed its intention to buy 9,25,000 shares of the Company, at prevailing market price (In the Block market) through Stock Exchange (DSE) within April 30, 2019.

Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	62.0	0.7%	42.4	76.9
Gold (\$/Ounce)	1292.0	-0.2%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
84.5	94.6	110.3	1.2	59.7

\*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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