

BASL Daily Market Commentary

Sunday, February 3, 2019

Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000
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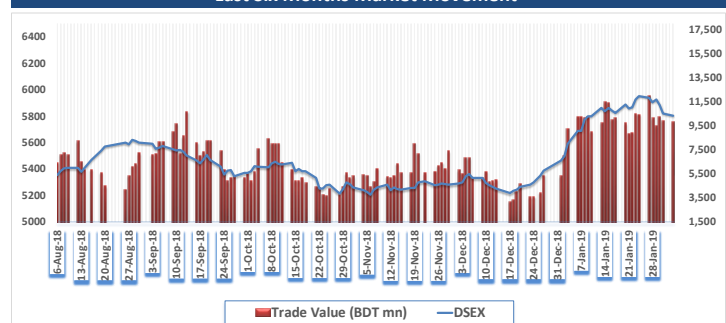


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Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index decreased by 19.7 points or 0.3% and closed at 5801.3 points today. Today the blue-chip index DS30 closed in red and closed at 2003.8 and the shariah based index DSES closed in green and closed at 1311.4. Turnover stood at BDT 9842 million (USD 118.6 million), about 0.86% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Life Insurance sector (+1.0%) was the highest gainer, followed by Pharmaceuticals (+0.9%) and Fuel & Power (+0.9%) respectively, whereas Jute (-4.3%) was the highest loser, followed by Ceramics (-1.8%) and Paper & Printing (-1.5%). GP (-1.1%) was the highest traded share with a turnover of BDT 261.7 million followed by BATBC (-0.5%) and squarepharma (+1.3%) respectively. Banks sector has highest turnover of 17.4% in the market. ICBAMCL2ND (+10.0%) was the today's top gainer while APOLOISPAT (-8.8%) was the top loser today.

Last Six Months Market Movement



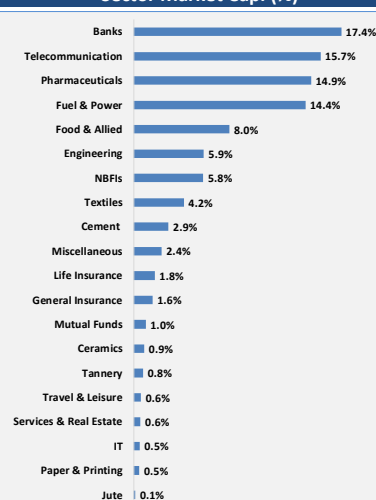
Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5801.3	5821.0	-19.7	-0.3%	-7.1%
DSES	1311.4	1310.6	0.8	0.1%	-5.7%
DS30	2003.8	2008.0	-4.1	-0.2%	-12.2%
Total Scripts					
	330	133	186	27	
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	16.32	16.34	Market RSI (14)	55.81	58.21
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap					
Mn BDT	4,156,590	4,163,604	(7,014)	-0.17%	
Mn USD	50,079	50,164	(85)		
Turnover					
Mn BDT	9,842	9,927	(85)	-0.86%	
Mn USD	118.6	119.6	(1.0)		
Volume					
Mn Shares	240.7	260.3	(19.7)	-8%	

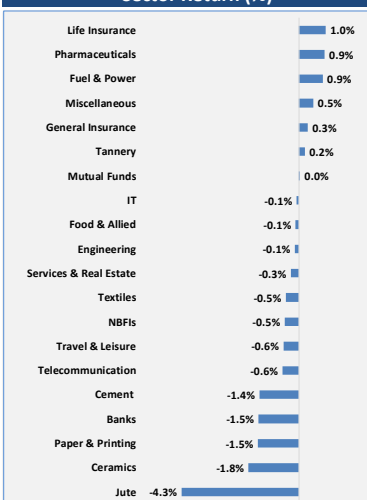
Sector Review

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	763.4	7.8%	-22.5%	619,723	17.4%	-1.5%	11.0
Cement	7	104.8	1.1%	181.4%	103,787	2.9%	-1.4%	41.5
Ceramics	5	135.2	1.4%	-57.1%	31,056	0.9%	-1.8%	21.8
Engineering	36	924.6	9.5%	-3.8%	208,894	5.9%	-0.1%	17.9
Food & Allied	17	265.0	2.7%	-23.7%	284,958	8.0%	-0.1%	21.5
Fuel & Power	19	1566.2	16.0%	55.1%	512,647	14.4%	0.9%	13.6
General Insurance	35	1663.9	17.0%	8.4%	56,547	1.6%	0.3%	17.0
IT	8	154.5	1.6%	-49.3%	17,921	0.5%	-0.1%	22.7
Jute	3	13.9	0.1%	-27.6%	4,519	0.1%	-4.3%	93.4
Life Insurance	12	213.9	2.2%	106.7%	62,888	1.8%	1.0%	n/m
Miscellaneous	13	437.1	4.5%	5.1%	83,574	2.4%	0.5%	24.2
Mutual Funds	37	40.4	0.4%	-20.0%	35,832	1.0%	0.0%	13.7
NBFIs	23	430.4	4.4%	-14.0%	207,393	5.8%	-0.5%	26.5
Paper & Printing	3	46.7	0.5%	-49.8%	16,727	0.5%	-1.5%	36.5
Pharmaceuticals	31	732.7	7.5%	-29.6%	529,649	14.9%	0.9%	18.6
Services & Real Estate	4	177.7	1.8%	-1.1%	20,048	0.6%	-0.3%	18.2
Tannery	6	158.4	1.6%	22.0%	27,859	0.8%	0.2%	16.9
Telecommunication	2	1014.0	10.4%	64.2%	557,710	15.7%	-0.6%	15.7
Textiles	53	903.8	9.2%	-21.1%	149,629	4.2%	-0.5%	20.5
Travel & Leisure	4	24.9	0.3%	-23.0%	21,765	0.6%	-0.6%	29.6

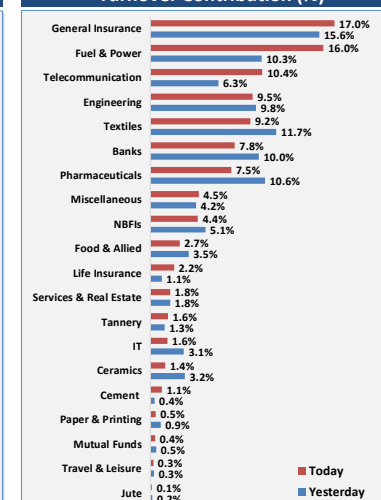
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
GP	394	-1.1%	261.7	15.0%
BATBC	3549.1	-0.5%	5.4	6.0%
SQURPHARMA	266.7	1.3%	74.1	5.9%
UPGDCL	393.6	0.6%	509.1	5.3%
RENATA	1136.5	-0.3%	11.5	2.6%
ICB	123.6	0.7%	3.9	2.4%
BRACBANK	78.5	0.0%	36.6	2.4%
LHBL	43.4	-1.6%	24.1	1.4%
OLYMPIC	244.8	1.8%	52.4	1.4%
SUMITPOWER	42.1	0.0%	34.3	1.3%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	394	-1.1%	532,018	15.0%
BATBC	3549.1	-0.5%	212,946	6.0%
SQURPHARMA	266.7	1.3%	210,429	5.9%
UPGDCL	393.6	0.6%	188,569	5.3%
RENATA	1136.5	-0.3%	91,529	2.6%
ICB	123.6	0.7%	86,233	2.4%
BRACBANK	78.5	0.0%	84,191	2.4%
LHBL	43.4	-1.6%	50,404	1.4%
OLYMPIC	244.8	1.8%	48,945	1.4%
SUMITPOWER	42.1	0.0%	44,958	1.3%

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

ACFL: Prohibition on providing loan facilities to purchase securities

DSE NEWS: The Stock Brokers and Merchant Bankers are requested to abstain from providing loan facilities to purchase securities of Aman Cotton Fibrous Limited in between 1st to 30th trading day after change of categorization, with effect from February 04, 2019 as per BSEC Directive No. SEC/CMRRCD/2009-193/177 and BSEC Order No. SEC/CMRRCD/2009-193/178 dated October 27, 2015.

Commodity Prices

Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	55.4	0.2%	42.4	76.9
Gold (\$/Ounce)	1322.0	0.0%	1167.0	1369.0

Exchange Rates

USD	EURO	GBP	RUPEE	CAD
83.7	95.9	109.6	1.2	60.7

*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

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