

# BASL Daily Market Commentary

Wednesday, September 5, 2018

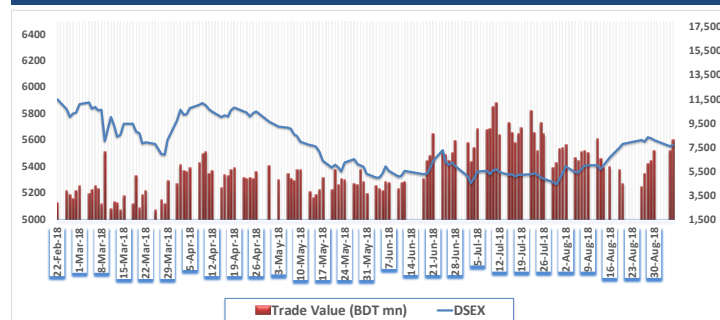
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
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## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index advanced by 9.4 points or 0.2% and closed at 5562.2 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green closing to 1955.6 and 1280.0 respectively. Turnover stood at BDT 8118 million (USD 97.8 million), about 13.22% higher than the previous trading session's value. Most of the sectors witnessed bullish performance today. Paper & Printing sector (+6.0%) was the highest gainer, followed by Travel & Leisure (+3.7%) and Service & Real Estate (+3.0%), whereas Banks (-1.1%) was the highest loser, followed by NBFIs (-0.9%) and Mutual Funds (-0.5%). KPCL (+706%) was the highest traded share with a turnover of BDT 601.4 million followed by UPGDCL (+0.4%) and PENINSULA (-9.7%) respectively. Banks sector has highest turnover of 17.3% in the market. MEGHNAPET (+10.0%) was the today's top gainer while SEMLLECMF (-9.2%) was the top loser today.

## Last Six Months Market Movement



## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5562.2	5552.8	9.4	0.2%	-10.9%
DSES	1280.0	1271.0	9.0	0.7%	-8.0%
DS30	1955.6	1950.3	5.3	0.3%	-14.3%

Total Scripts	Advanced	Declined	Unchanged
330	156	131	49

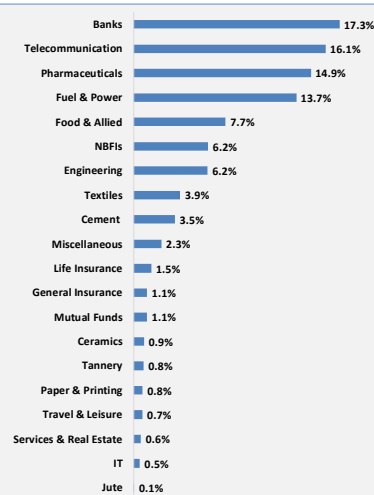
Market Indicators	Today	Last day	Today	Last day
Market PE	15.64	15.59	Market RSI (14)	62.46
				61.39

Market Statistics	Today	Last day	Change	Change (%)
Market Cap				
Mn BDT	3,962,980	3,952,956	10,024	0.25%
Mn USD	47,747	47,626	121	
Turnover				
Mn BDT	8,118	7,170	948	13.22%
Mn USD	97.8	86.4	11.4	
Volume				
Mn Shares	182.8	170.4	12.4	7%

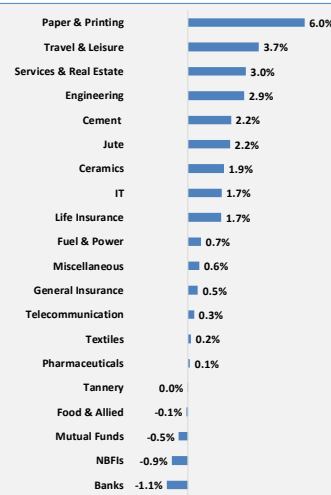
## Sector Review

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	484.3	6.0%	-19.6%	582,651	17.3%	-1.1%	10.1
Cement	7	305.9	3.8%	1.3%	116,977	3.5%	2.2%	37.5
Ceramics	5	59.8	0.7%	27.8%	29,181	0.9%	1.9%	31.9
Engineering	35	1497.1	18.6%	45.9%	209,366	6.2%	2.9%	19.3
Food & Allied	18	223.6	2.8%	3.3%	260,083	7.7%	-0.1%	18.7
Fuel & Power	18	1324.8	16.4%	10.5%	460,326	13.7%	0.7%	15.3
General Insurance	35	75.4	0.9%	57.8%	38,160	1.1%	0.5%	10.4
IT	8	158.0	2.0%	-7.1%	17,525	0.5%	1.7%	20.6
Jute	3	20.5	0.3%	-61.7%	1,748	0.1%	2.2%	352.7
Life Insurance	12	69.2	0.9%	13.5%	49,810	1.5%	1.7%	n/m
Miscellaneous	12	469.4	5.8%	49.3%	78,629	2.3%	0.6%	21.3
Mutual Funds	36	45.3	0.6%	24.5%	38,089	1.1%	-0.5%	8.8
NBFIs	23	766.5	9.5%	22.8%	210,496	6.2%	-0.9%	18.1
Paper & Printing	2	158.4	2.0%	65.3%	25,379	0.8%	6.0%	50.2
Pharmaceuticals	28	611.4	7.6%	24.9%	501,492	14.9%	0.1%	17.9
Services & Real Estate	4	207.9	2.6%	447.5%	20,673	0.6%	3.0%	16.9
Tannery	6	47.3	0.6%	-11.6%	28,153	0.8%	0.0%	16.8
Telecommunication	2	199.2	2.5%	-1.0%	543,206	16.1%	0.3%	15.8
Textiles	48	765.9	9.5%	-2.1%	131,877	3.9%	0.2%	20.3
Travel & Leisure	4	576.8	7.2%	201.7%	24,902	0.7%	3.7%	33.0

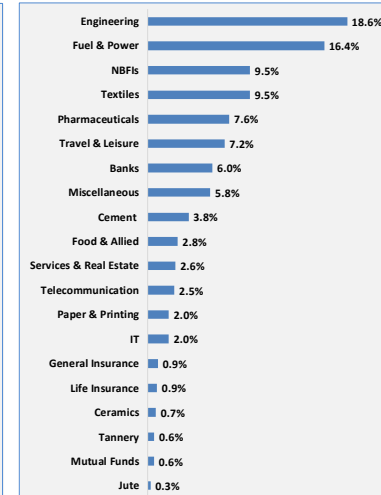
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



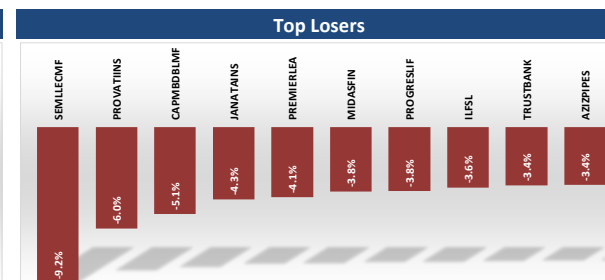
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
KPCL	95.1	7.6%	601.4	7.5%
UPGDCL	363.5	0.4%	301.6	3.7%
PENINSULA	36.3	9.7%	297.1	3.7%
UNIQUEHRL	58.1	3.0%	278.5	3.5%
AMANFEED	74.4	2.3%	274.7	3.4%
CONFIDCEM	216.6	7.8%	254.1	3.1%
BBSCABLES	122.3	1.8%	231.6	2.9%
NHFIL	80	-2.6%	223.9	2.8%
IPDC	43.5	-2.7%	218.2	2.7%
BSRMLTD	106.5	8.3%	196.8	2.4%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	388.4	0.2%	524,457	15.6%
SQURPHARMA	277	-0.3%	204,257	6.1%
BATBC	3300.3	-0.8%	198,018	5.9%
UPGDCL	363.5	0.4%	145,123	4.3%
ICB	138.1	-0.1%	91,761	2.7%
RENATA	1228.3	-0.1%	86,019	2.6%
BRACBANK	73.9	-2.8%	79,258	2.4%
LHBL	54.1	2.7%	62,830	1.9%
SUMITPOWER	40.5	1.3%	43,249	1.3%
OLYMPIC	210.8	2.9%	42,147	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
UPGDCL	90%C 20%S	06.09.2018	30.10.2018	
SANDHANINS	20% S	13.09.2018	30.09.2018	
DSSL	5%C 20%S	13.09.2018	12.11.2018	
KDSALTD	10% C & 5% S	18.09.2018	25.10.2018	
RUPALIIFE	8%C 4%S	26.09.2018	17.10.2018	

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

### AGRANINS: Buy Declaration of a Sponsor Director

Mr. Mahmudul Hoque, one of the Sponsors Directors of the Company, has expressed his intention to buy 4,000 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

### NCCBANK: Buy Declaration of a Sponsor Director

Mrs. Sohela Hossain, one of the Sponsors Directors of the Company, has expressed her intention to buy 20,00,000 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	69.1	-1.1%	47.0	75.3
Gold (\$/Ounce)	1199.8	0.1%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.5	95.3	106.4	1.2	61.0

\*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

Source: www.dsebd.org; www.bloomberg.com, www.finance.yahoo.com, http://money.cnn.com, https://fx-rate.net

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