

# BASL Daily Market Commentary

Monday, January 7, 2019

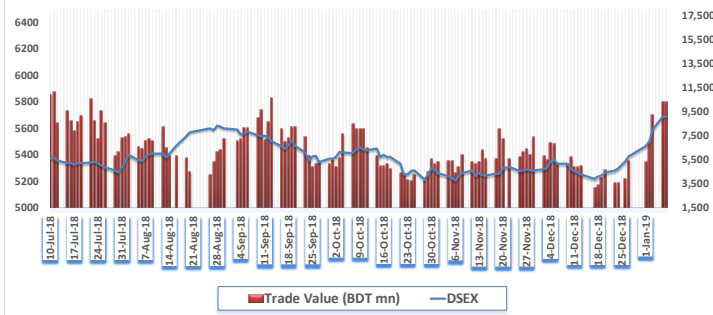
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
info@basl-bd.com, Tel- 9515826-2, www.basl-bd.com



## Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index decreased by 31.8 points or 0.6% and closed at 5655.2 points today. The blue-chip index DS30 and the shariah based index DSES both closed in red, closing to 1963.9 and 1289.5 respectively. Turnover stood at BDT million 9655 (USD 116.3 million), about 5.96 % lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Jute Sector (+2.6%) was the highest gainer followed by Mutual Fund (+1.4%) and Food & Allied (+0.8%) respectively whereas Paper & Printing sector (-2.2%) was the highest loser followed by Ceramics (-2.1%), Travel & Leisure (-1.9%) and Miscellaneous (-1.2%) respectively. BRACBANK (-1.0%) was the highest traded share with a turnover of BDT 256.0 million followed by OLYMPIC (+4.1%) and BBBSCABLES (-2.2%) respectively. Banks sector has highest turnover of 17.6% in the market. 1JANATAMF (+6.1%) was the today's top gainer while DULAMIACOT (-4.1%) was the top loser today.

## Last Six Months Market Movement



## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5655.2	5687.0	-31.8	-0.6%	-9.4%
DSES	1289.5	1295.3	-5.8	-0.4%	-7.3%
DS30	1963.9	1974.1	-10.2	-0.5%	-14.0%

	Total Scripts	Advanced	Declined	Unchanged
	330	116	199	30

Market Indicators	Today	Last day	Today	Last day
Market PE	15.19	15.26	Market RSI (14)	79.37
				84.80

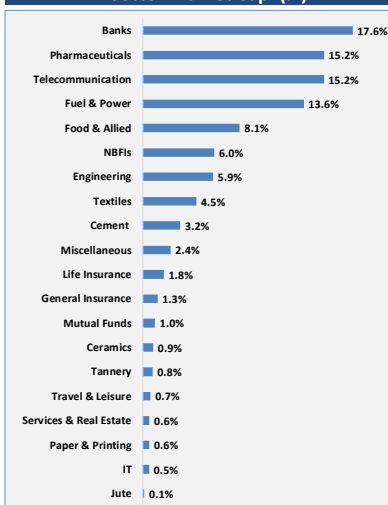
  

Market Statistics	Today	Last day	Change	Change (%)
Mn BDT	4,032,061	4,032,061	-	0.00%
Mn USD	48,579	48,579	-	0.00%
Turnover Mn BDT	9,655	10,268	(612)	-5.96%
Mn USD	116.3	123.7	(7.4)	-5.96%
Volume Mn Shares	294.0	314.2	(20.2)	-6%

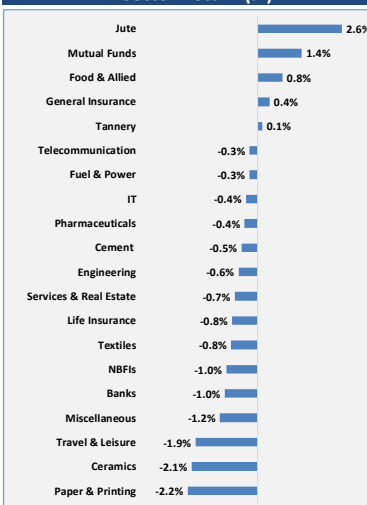
## Sector Review

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	991.4	10.4%	-15.3%	602,739	17.6%	-1.0%	10.7
Cement	7	128.3	1.3%	6.6%	108,056	3.2%	-0.5%	39.2
Ceramics	5	84.3	0.9%	-10.1%	29,950	0.9%	-2.1%	22.2
Engineering	36	1561.2	16.3%	12.1%	201,988	5.9%	-0.6%	16.9
Food & Allied	17	517.2	5.4%	17.4%	278,355	8.1%	0.8%	20.7
Fuel & Power	19	729.6	7.6%	-15.5%	462,925	13.6%	-0.3%	11.3
General Insurance	35	367.4	3.8%	36.2%	42,888	1.3%	0.4%	12.9
IT	8	431.1	4.5%	-1.8%	18,200	0.5%	-0.4%	22.3
Jute	3	50.5	0.5%	-17.5%	5,048	0.1%	2.6%	229.1
Life Insurance	12	175.2	1.8%	-22.4%	60,861	1.8%	-0.8%	n/m
Miscellaneous	13	460.8	4.8%	-20.1%	80,676	2.4%	-1.2%	23.2
Mutual Funds	37	67.7	0.7%	-7.8%	35,594	1.0%	1.4%	16.0
NBFIs	23	510.2	5.3%	-16.5%	205,065	6.0%	-1.0%	25.1
Paper & Printing	3	75.5	0.8%	-26.5%	19,012	0.6%	-2.2%	26.3
Pharmaceuticals	31	973.4	10.2%	-13.9%	520,596	15.2%	-0.4%	17.4
Services & Real Estate	4	69.2	0.7%	-22.1%	19,426	0.6%	-0.7%	13.7
Tannery	6	118.5	1.2%	6.9%	28,320	0.8%	0.1%	16.0
Telecommunication	2	214.8	2.2%	142.8%	519,745	15.2%	-0.3%	14.8
Textiles	53	1940.4	20.3%	-9.6%	153,500	4.5%	-0.8%	17.8
Travel & Leisure	4	99.1	1.0%	-12.5%	22,929	0.7%	-1.9%	27.6

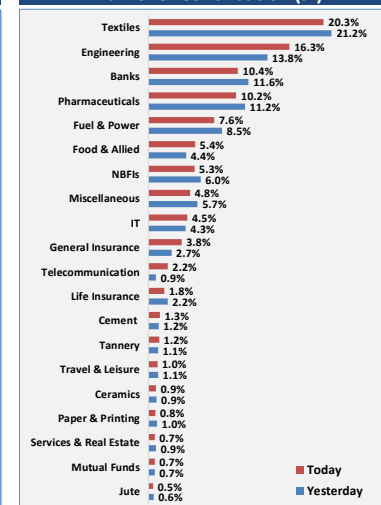
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



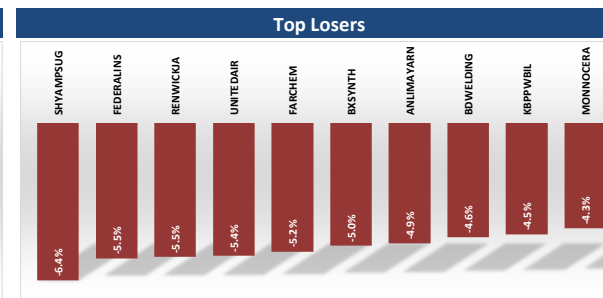
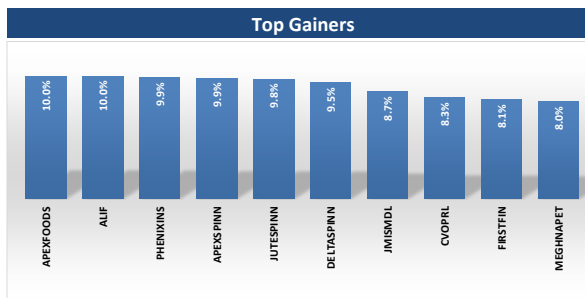
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
BRACBANK	75.8	-1.0%	256.0	2.7%
OLYMPIC	244.1	4.1%	223.3	2.3%
BBSABLES	106.9	-2.2%	219.8	2.3%
SINGERBD	230.7	2.0%	207.1	2.2%
BEXIMCO	25.3	-3.1%	201.3	2.1%
ALIF	12.1	10.0%	198.8	2.1%
DSSL	25	0.0%	189.0	2.0%
GP	372.1	-0.2%	177.4	1.9%
BDTHAI	23.6	4.4%	168.1	1.8%
PTL	69.9	-1.8%	155.5	1.6%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	372.1	-0.2%	502,447	14.7%
BATBC	3452.3	0.1%	207,138	6.1%
SQURPHARMA	256.8	-0.4%	202,617	5.9%
UPGDCL	328.8	-0.3%	157,524	4.6%
RENATA	1143.7	0.2%	92,109	2.7%
ICB	125.3	-1.6%	87,419	2.6%
BRACBANK	75.8	-1.0%	81,296	2.4%
LHBL	47	-2.1%	54,585	1.6%
OLYMPIC	244.1	4.1%	48,805	1.4%
SUMITPOWER	41	-1.9%	43,783	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

### CENTRALPHL: Fine Imposed on Directors of the Company

BSEC News: BSEC has imposed fine of Tk. 4.00 lac each to the Directors of Central Pharmaceuticals Limited; namely Mrs. Morsheha Ahmed, Mr. Munsur Ahamed, Mr. Md. Rukunuzzaman, Mr. Parvez Ahamed Bhuiyan and Mrs. Nasima Akter for noncompliance with BAS and Securities laws in connection with financial statements for the year ended on June 30, 2017.

## Commodity Prices

Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	48.9	2.0%	42.4	76.9
Gold (\$/Ounce)	1292.5	0.5%	1167.0	1369.0

## Exchange Rates

USD	EURO	GBP	RUPEE	CAD
83.8	95.8	106.6	1.2	59.8

\*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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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).

## BASL Research Team

Mr. Shariful Alam Chowdhury  
Head of Research & Investments

tushar@basl-bd.com, tusharbd@bloomberg.net

Mr. Shohidul Islam  
Research Analyst

shohidul@basl-bd.com, shohidulbd@bloomberg.net

Mr. Monir Hossain  
Research Associate

monir@basl-bd.com

Tanzin Naher  
Research Associate

Tanzin.naher@basl-bd.com

## BASL Networks

<b>Head Office</b> Hadi Mansion (7th Floor) 2, Dilkusha Commercial Area Dhaka-1000 Phone: +88-02-9515826-28 Fax: +88-02-9567884	<b>Modhumita Extension Office</b> 158-160 Modhumita Building (5th Floor) Motijheel C/A, Dhaka-1000 Phone: +88-01819118893	<b>Dhanmondi Branch</b> Meher Plaza (1st Floor), House # 13/A, Road # 05 Dhanmondi, Dhaka - 1207 Phone: +8802-8624874-5	<b>Mirpur Branch</b> Nishi Plaza, plot # 01, Avenue-04, Section-06, Block-C Mirpur, Dhaka - 1216 Phone: +88-02-9013841	<b>Uttara Branch</b> House # 79/A, (4th Floor), Road # 07, Sector # 04 Uttara Model Town, Dhaka-1230 Phone: +88-02-8958371	<b>Banani Branch</b> Nur Empori, Plot # 77 (1st Floor), Road No # 11, Banani, Dhaka-1213 Phone: +8801716180767	<b>Khulna Branch</b> 28, Sir Iqbal Road (1st Floor) Khulna Phone: +88-041-731208-9
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For International Trade & Sales, please contact **Mr. Sumon Das, Chief Executive Officer**. Please call at +8801993111666, +880 02 9515826, Ext:101 at Business hour. For further query, write to us at [research@basl-bd.com](mailto:research@basl-bd.com).