

BASL Daily Market Commentary

Thursday, November 7, 2019

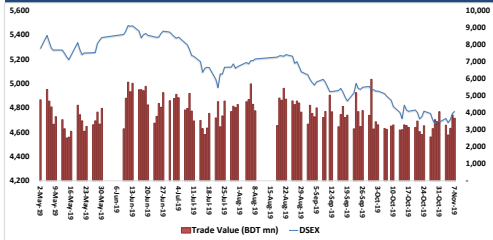
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Today's Market View

The DSE broad index- DSEX closed in green today. The benchmark index advanced by 17.2 points or 0.4% and closed at 4771.9 points today. The blue-chip index D530 and the shariah based index DSE5 both closed in green, closing to 1657.9 and 1089.6 respectively. Turnover stood at BDT million 3,671 (USD 43.3 million), about -4.72% lower than the previous trading session's value. Most of the sectors witnessed bullish performance today. Life Insurance Sector (+4.5%) was the highest gainer followed by NBFi Sector (+4.1%) whereas Jute Sector (-2.2%) was the highest loser followed by Ceramics Sector (-1.0%). NTLTUBES (+4.9%) was the highest traded share with a turnover of BDT 194.7 million followed by SONARBAINS (+9.6%) and FORTUNE (+4.4%) respectively. Engineering sector has continued its highest turnover position of 15.6% in the whole market. ICB(+9.9%) was the today's top gainer while FAMILYTEX (-7.7%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	4771.9	4754.7	17.2	0.4%	-23.6%
DSE5	1089.6	1089.3	0.2	0.0%	-21.7%
D530	1657.9	1654.2	3.7	0.2%	-27.4%

Total Scripts	Advanced	Declined	Unchanged	Not Traded
356	164	115	51	25

Market Indicators	Today	Last day	Today	Last day	
Market PE	13.48	13.55	Market RSI (14)	47.96	45.89

Market Statistics	Today	Last day	Change	Change (%)
Market Cap	3,591,103	3,578,274	12,829	0.36%

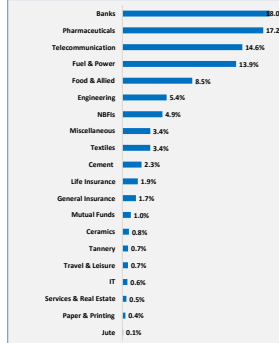
Market Cap	Mn BDT	Mn USD	Mn BDT	Mn USD	Turnover
Mn BDT	3,591,103	42,323	3,578,274	42,172	151
Mn USD	43.3	3.671	43.3	3.853	(182)
Turnover	3,671	43.3	3,671	43.3	(182)

Volume	Mn Shares	Today	Last day	Change	Change (%)
Mn Shares	128.9	128.9	141.5	(12.6)	-9%

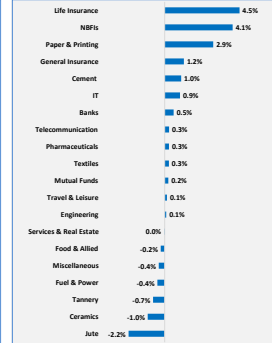
Sector Review

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	371.4	10.4%	-16.0%	542,220	18.0%	0.5%	8.3
Cement	7	36.2	1.0%	-19.5%	70,352	2.3%	1.0%	24.4
Ceramics	5	76.5	2.1%	-24.8%	24,302	0.8%	-1.0%	27.7
Engineering	39	555.5	15.6%	-4.5%	162,775	5.4%	0.1%	13.9
Food & Allied	17	115.2	3.2%	-28.2%	257,080	8.5%	-0.2%	23.2
Fuel & Power	19	290.6	8.2%	23.2%	418,206	13.9%	-0.4%	10.9
General Insurance	35	401.1	11.3%	64.1%	49,922	1.7%	1.2%	14.0
IT	9	38.9	1.1%	-71.3%	18,663	0.6%	0.9%	20.1
Jute	3	14.1	0.4%	-64.6%	2,784	0.1%	-2.2%	43.4
Life Insurance	12	53.5	1.5%	172.4%	56,969	1.9%	4.5%	20.5
Miscellaneous	13	184.4	5.2%	21.6%	102,559	3.4%	-0.4%	n/m
Mutual Funds	37	84.8	2.4%	-9.6%	31,003	1.0%	0.2%	47.8
NBFIs	23	164.3	4.6%	-26.2%	147,257	4.9%	4.1%	21.2
Paper & Printing	3	23.6	0.7%	-32.1%	11,228	0.4%	2.9%	31.5
Pharmaceuticals	32	518.0	14.6%	10.4%	517,967	17.2%	0.3%	17.1
Services & Real Estate	4	16.9	0.5%	-59.6%	14,914	0.5%	0.0%	12.4
Tannery	6	150.3	4.2%	13.7%	21,005	0.7%	-0.7%	21.7
Telecommunication	2	117.3	3.3%	8.9%	441,172	14.6%	0.3%	12.8
Textiles	55	320.8	9.0%	-32.8%	102,501	3.4%	0.3%	16.4
Travel & Leisure	5	23.8	0.7%	-48.1%	20,703	0.7%	0.1%	26.9

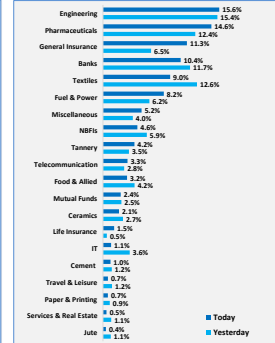
Sector Market Cap. (%)



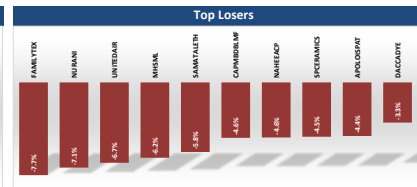
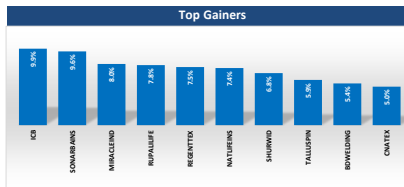
Sector Return (%)



Turnover Contribution (%)



Most Active Stocks				
Script	Price	Change (%)	Turnover (BDT mm)	Turnover As (%)
NTLTUBES	166.2	4.9%	194.7	5.5%
SONARBAINS	42.3	9.6%	146.6	4.1%
FORTUNE	30.7	4.4%	112.9	3.2%
BSCCL	109.9	3.6%	95.5	2.7%
SILVAPHIL	17.4	-0.8%	74.4	2.1%
RENATA	1294.7	0.4%	74.2	2.1%
SQURPHARMA	239	0.4%	70.6	2.0%
STANCERAM	553.5	-2.5%	69.6	2.0%
SHURVID	30	6.8%	67.1	1.9%
WATACHEM	602.4	0.7%	62.6	1.8%



Market Leaders Composition				
Script	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	313.3	0.3%	423,049	14.0%
BATTC	1126.3	0.0%	202,734	6.7%
SQURPHARMA	239	0.4%	197,394	6.2%
UPGDCL	262.9	-0.8%	138,547	4.6%
RENATA	1294.7	0.4%	104,270	3.5%
BRACBANK	57.9	1.0%	71,412	2.4%
BERGERPBL	1446.5	-0.7%	67,086	2.2%
ICB	90.7	9.9%	63,279	2.1%
MARICO	1710.9	-0.1%	53,893	1.8%
SUMITPOWER	37.5	0.5%	40,045	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Script	Declaration	Record Date	AGM Date	
NURANI	10%	06.11.2019	19.12.2019	
BSC	10% cash	06.11.2019	24.11.2019	
SILVAPHIL	6% cash, 5% stock	06.11.2019	25.11.2019	
NURANI	10% stock	06.11.2019	19.12.2019	
GENEXIL	5% cash, 15% stock	07.11.2019	24.12.2019	
FEXDIL	5% cash, 5% stock	14.11.2019	05.12.2019	
APEXSPINN	20% cash	11.11.2019	12.12.2019	

Performances of World Stock Indices				
Indices	Country	Index Value	Change	Change (%)
DIA	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

ORIONPHARM: Dividend Declaration

The Company has also reported Consolidated EPS of Tk. 3.77, Consolidated NAV per share (Including Revaluation Surplus) of Tk. 75.19, Consolidated NAV per share (Excluding Revaluation Surplus) of Tk. 66.98 and Consolidated NOCFPS of Tk. 6.19 for the year ended on June 30, 2019 as against Tk. 3.43, Tk. 72.88, Tk. 64.55 and Tk. 9.38 respectively for the same period of the previous year.

POWERGRID: Dividend Declaration

The Board of Directors has recommended 20% cash dividend for the year ended on June 30, 2019. Date of AGM: 25.01.2020, Time: 10:00 AM, Venue: PGCB Head Office Building Auditorium, Atfahbagor (Beside NLDC Building), Dhaka. Record Date: 22.12.2019. The Company has also reported EPS of Tk. 8.33, NAV per share of Tk. 143.76 and NOCFPS of Tk. 14.60 for the year ended on June 30, 2019 as against Tk. 4.73, Tk. 108.12 and Tk. 27.51 respectively for the same period of the previous year.

Commodity Prices

Commodity	Latest	Change (%)	\$2W-Low	\$2W-High
Oil (\$/barrel)	57.1	1.3%	42.4	66.6
Gold (\$/Ounce)	1483.0	-0.7%	1197.0	1566.0

Exchange Rates

USD	EURO	GBP	RUPEE	CAD
84.9	94.1	109.2	1.2	58.6

*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://fk-rate.net

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