

BASL Daily Market Commentary

Wednesday, January 9, 2019

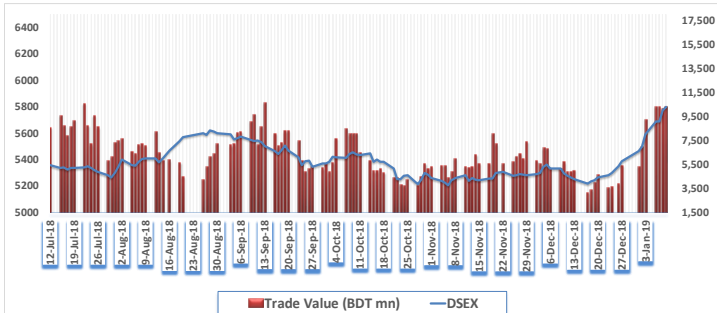
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Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 27.8 points or 0.5% and closed at 5798.6 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 2011.1 and 1316.0 respectively. Turnover stood at BDT million 10257 (USD 123.6 million), about 1.55 % higher than the previous trading session's value. Most of the sectors witnessed bearish performance today. Life Insurance Sector (+5.1%) was the highest gainer followed by NBFIs (+3.1%) and Jute (+2.9%) respectively whereas Textile sector (-1.1%) was the highest loser followed by Paper & Printing (-1.0%), Ceramics (-0.7%) respectively. OLYMPIC (+7.0%) was the highest traded share with a turnover of BDT 395.2 million followed by ACTIVEFINE (-5.9%) and BBSCABLES (+3.5%) respectively. Banks sector has highest turnover of 18.0% in the market. ATLASBANG (+7.9%) was the today's top gainer while KPPL (-4.1%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5798.6	5770.8	27.8	0.5%	-7.1%
DSES	1316.0	1308.1	7.9	0.6%	-5.4%
DS30	2011.1	2001.2	9.9	0.5%	-11.9%

Total Scripts	Advanced	Declined	Unchanged
330	148	161	37

Market Indicators	Today	Last day	Market RSI (14)	Today	Last day
Market PE	15.56	15.46	84.32	83.50	83.50

Market Statistics	Today	Last day	Change	Change (%)
Mn BDT	4,098,890	4,076,807	22,083	0.54%

Market Cap	Today	Last day	Change	Change (%)
Mn USD	49,384	49,118	266	0.54%

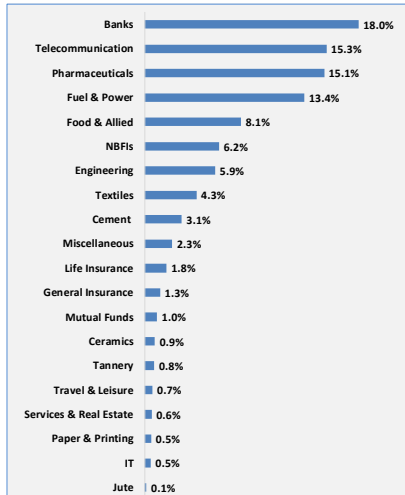
Turnover	Today	Last day	Change	Change (%)
Mn BDT	10,257	10,100	157	1.55%

Volume	Today	Last day	Change	Change (%)
Mn Shares	278.7	299.4	(20.7)	-7%

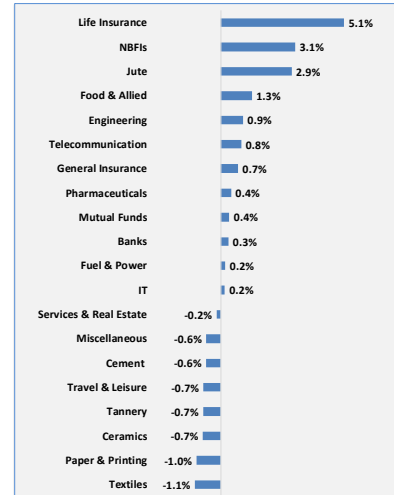
Sector Review

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	1465.2	14.3%	-6.6%	629,055	18.0%	0.3%	11.2
Cement	7	186.3	1.8%	1.7%	109,002	3.1%	-0.6%	39.5
Ceramics	5	63.2	0.6%	-25.7%	30,012	0.9%	-0.7%	22.3
Engineering	36	1665.0	16.3%	18.0%	206,610	5.9%	0.9%	17.3
Food & Allied	17	616.6	6.0%	16.9%	282,375	8.1%	1.3%	21.0
Fuel & Power	19	730.5	7.1%	1.9%	469,316	13.4%	0.2%	11.5
General Insurance	35	468.4	4.6%	-13.8%	45,347	1.3%	0.7%	13.7
IT	8	331.9	3.2%	-7.5%	18,097	0.5%	0.2%	22.2
Jute	3	56.1	0.5%	-30.9%	5,202	0.1%	2.9%	236.1
Life Insurance	12	504.0	4.9%	82.1%	64,131	1.8%	5.1%	n/m
Miscellaneous	13	398.0	3.9%	-18.3%	80,854	2.3%	-0.6%	23.2
Mutual Funds	37	55.3	0.5%	-16.2%	36,465	1.0%	0.4%	16.4
NBFIs	23	701.1	6.9%	22.1%	217,990	6.2%	3.1%	26.7
Paper & Printing	3	50.3	0.5%	-9.5%	18,750	0.5%	-1.0%	25.9
Pharmaceuticals	31	1259.0	12.3%	17.6%	527,251	15.1%	0.4%	17.6
Services & Real Estate	4	108.2	1.1%	-7.7%	20,338	0.6%	-0.2%	14.4
Tannery	6	88.5	0.9%	-26.6%	28,128	0.8%	-0.7%	15.9
Telecommunication	2	186.3	1.8%	14.0%	534,669	15.3%	0.8%	15.2
Textiles	53	1240.0	12.1%	-19.8%	151,928	4.3%	-1.1%	17.6
Travel & Leisure	4	50.6	0.5%	-23.1%	22,846	0.7%	-0.7%	27.5

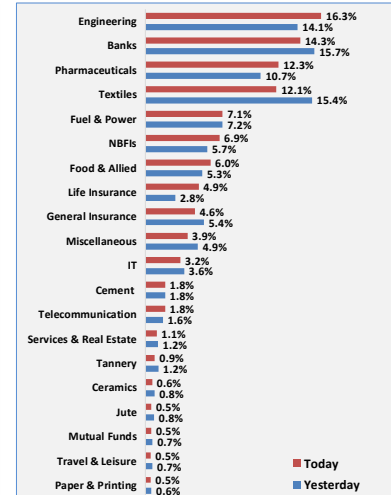
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



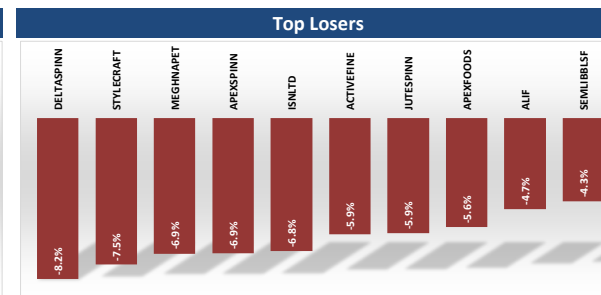
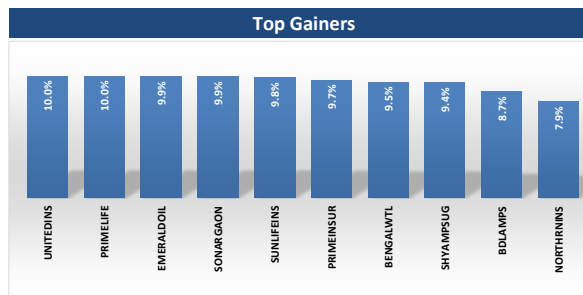
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
OLYMPIC	263	7.0%	359.2	3.5%
ACTIVEFINE	30.1	-5.9%	294.5	2.9%
BBCABLES	110.6	3.5%	293.9	2.9%
SINGERBD	238.7	2.8%	279.6	2.7%
DHAKABANK	17.4	5.5%	201.1	2.0%
BRACBANK	78.6	-0.4%	194.6	1.9%
SOURPHARMA	261.8	1.1%	176.4	1.7%
JMISMDL	390.3	-2.4%	168.9	1.7%
BEXIMCO	25.8	-1.1%	155.4	1.5%
NHFL	54.3	0.9%	154.7	1.5%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	382.7	0.8%	516,760	14.8%
BATBC	3452.7	0.1%	207,162	5.9%
SOURPHARMA	261.8	1.1%	206,562	5.9%
UPGDCL	325.3	-2.3%	155,847	4.5%
ICB	139.2	6.3%	97,116	2.8%
RENATA	1146.6	-0.1%	92,342	2.6%
BRACBANK	78.6	-0.4%	84,299	2.4%
LHBL	47.2	-1.3%	54,817	1.6%
OLYMPIC	263	7.0%	52,584	1.5%
ISLAMIBANK	27.9	1.8%	44,919	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

BBCABLES: Enhancement of production capacity
The Company has informed that it has imported capital machineries by utilizing IPO proceeds and the Company is planning to start the commercial production from the new machineries with effect from 12.01.2019. The current installed annual production capacity of the Company is 16,600 MT as on 30.06.2018 as a result of installing the new machineries, the annual production will increase by 37% (6,100 MT) that will stand up to 22,700 MT (approx.) annually, the value of which is about Tk. 1,200.00 crore approx.

Comodity Prices

Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	50.3	1.0%	42.4	76.9
Gold (\$/Ounce)	1284.0	-0.2%	1167.0	1369.0

Exchange Rates

USD	EURO	GBP	RUPEE	CAD
83.9	96.3	107.1	1.2	60.1

*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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