

BASL Daily Market Commentary

Thursday, August 9, 2018

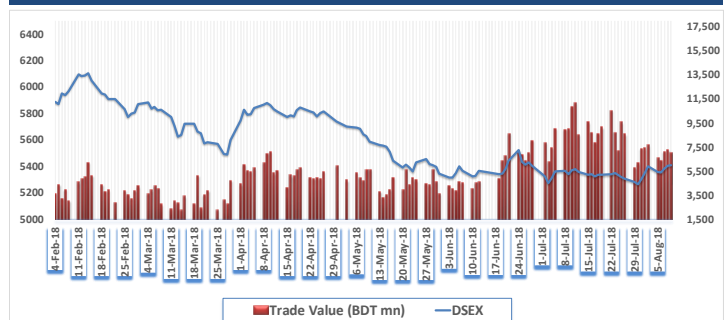
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Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index advanced by 1.1 points or 0.0% and closed at 5407.0 points today. The blue-chip index DS30 and the shariah based index DSES both closed in red closing to 1893.3 and 1245.9 respectively. Turnover stood at BDT 7039 million (USD 84.8 million), about -2.83% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. IT sector (+2.2%) was the highest gainer, followed by Life Insurance (+1.3%) and Textiles (+1.0%) respectively, whereas Jute (-3.5%) was the highest loser, followed by Telecommunication (-2.7%) and Paper & Printing (-2.1%). BBSCABLES (+5.5%) was the highest traded share with a turnover of BDT 419.8 million followed by UPGDCL (+0.9%) and SAIHAMTEX (9.8%) respectively. Banks sector has highest turnover of 17.3% in the market. INTECH (+10.0%) was the today's top gainer while SHYAMPSUG (-9.9%) was the top loser today.

Last Six Months Market Movement



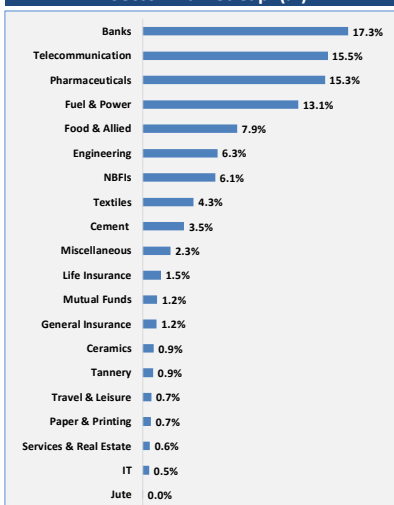
Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5407.0	5406.0	1.1	0.0%	-13.4%
DSES	1245.9	1251.7	-5.9	-0.5%	-10.4%
DS30	1893.3	1905.3	-12.0	-0.6%	-17.1%
Total Scripts		Advanced	Declined	Unchanged	
330		133	170	35	
Market Indicators	Today	Last day	Today		Last day
Market PE	15.2	15.20	Market RSI (14)		57.67
					57.53
Market Statistics		Today	Last day	Change	Change (%)
Market Cap	Mn BDT	3,845,597	3,858,417	(12,819)	-0.33%
	Mn USD	46,332	46,487	(154)	
Turnover	Mn BDT	7,039	7,244	(205)	-2.83%
	Mn USD	84.8	87.3	(2.5)	
Volume	Mn Shares	196.5	191.4	5.1	3%

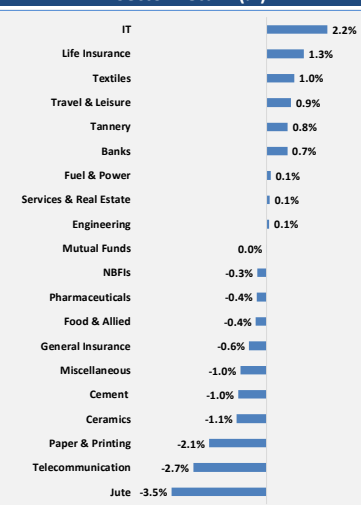
Sector Review

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	821.9	12.3%	9.8%	561,654	17.3%	0.7%	9.7
Cement	7	99.1	1.5%	78.3%	113,565	3.5%	-1.0%	36.4
Ceramics	5	180.3	2.7%	-8.2%	29,859	0.9%	-1.1%	32.6
Engineering	35	1380.2	20.6%	1.0%	204,451	6.3%	0.1%	18.8
Food & Allied	18	180.0	2.7%	-18.6%	258,084	7.9%	-0.4%	18.6
Fuel & Power	18	425.6	6.3%	35.9%	425,920	13.1%	0.1%	14.2
General Insurance	35	74.8	1.1%	-30.4%	38,252	1.2%	-0.6%	10.4
IT	8	165.0	2.5%	-2.1%	17,672	0.5%	2.2%	20.8
Jute	3	12.7	0.2%	-6.9%	1,513	0.0%	-3.5%	305.4
Life Insurance	12	112.9	1.7%	4.2%	49,975	1.5%	1.3%	n/m
Miscellaneous	12	373.9	5.6%	-11.8%	76,284	2.3%	-1.0%	20.7
Mutual Funds	36	56.1	0.8%	19.8%	39,990	1.2%	0.0%	11.7
NBFIs	23	238.4	3.6%	6.8%	198,049	6.1%	-0.3%	17.0
Paper & Printing	2	72.7	1.1%	1.1%	22,765	0.7%	-2.1%	45.1
Pharmaceuticals	28	459.0	6.8%	-1.4%	498,218	15.3%	-0.4%	17.8
Services & Real Estate	4	32.1	0.5%	15.9%	19,829	0.6%	0.1%	16.2
Tannery	6	217.1	3.2%	-34.5%	28,559	0.9%	0.8%	17.2
Telecommunication	2	149.9	2.2%	30.4%	505,767	15.5%	-2.7%	14.7
Textiles	48	1492.4	22.3%	-13.0%	139,696	4.3%	1.0%	21.5
Travel & Leisure	4	162.7	2.4%	-35.4%	23,500	0.7%	0.9%	31.2

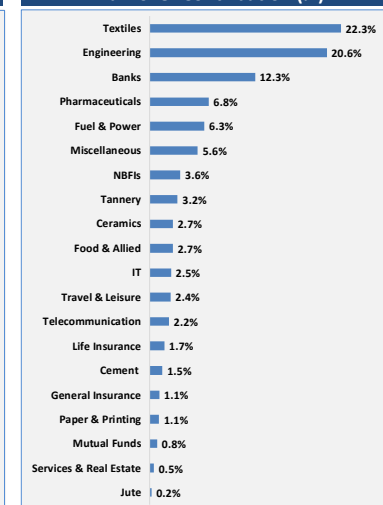
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



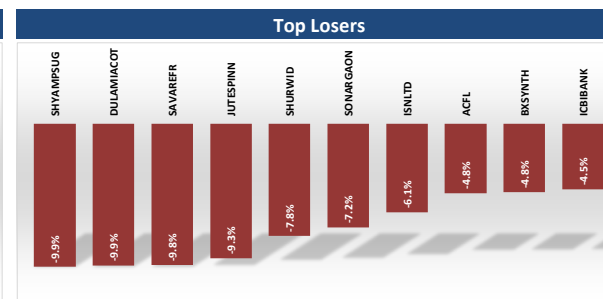
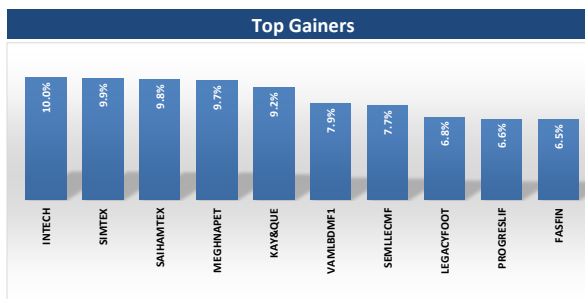
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
BBSCABLES	118.1	5.5%	419.8	6.3%
UPGDCL	335.1	0.9%	237.7	3.5%
SAIHAMTEX	33.5	9.8%	179.9	2.7%
ACFL	71.3	-4.8%	179.5	2.7%
PTL	66.2	2.2%	177.8	2.7%
MONNOCERA	347.4	-1.1%	153.0	2.3%
GP	363.8	-2.8%	149.3	2.2%
LEGACYFOOT	265.8	6.8%	144.7	2.2%
WMSHIPYARD	28.8	4.3%	127.6	1.9%
SIMTEX	47.6	9.9%	120.9	1.8%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	363.8	-2.8%	491,239	15.1%
SQURPHARMA	273.9	-0.7%	201,971	6.2%
BATBC	3301.7	0.0%	198,102	6.1%
UPGDCL	335.1	0.9%	133,785	4.1%
ICB	137	-0.5%	91,030	2.8%
RENATA	1239.5	0.1%	86,803	2.7%
BRACBANK	73.3	-1.6%	78,614	2.4%
LHBL	53.1	-1.3%	61,669	1.9%
SUMITPOWER	38.4	-0.3%	41,006	1.3%
OLYMPIC	198.4	-2.0%	39,668	1.2%

Upcoming Record Date & AGM date for Dividends/Right Offerings			
Scrip	Declaration	Record Date	AGM Date
MEGHNALIFE	20% C	19.08.2018	27.09.2018
NATLIFEINS	20% C & 15% S	20.08.2018	26.09.2018
PRAGATILIF	15% C & 10% S	27.08.2018	27.09.2018
SUNLIFEINS	2% S	28.08.2018	19.09.2018
UPGDCL	90% C 20% S	06.09.2018	30.10.2018

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

UPGDCL: Dividend Declaration

The Board of Directors has recommended 90% cash dividend and 20% stock dividend for the year ended on June 30, 2018. Date of AGM: 30.10.2018, Time: 10:30 AM Venue: Golf Garden, Army Golf Club, Airport Road, Dhaka. Record Date: 06.09.2018. The Company has also reported EPS of Tk. 11.51, NAV per share of Tk. 40.80 and NOCFPS of Tk. 10.81 for the year ended on June 30, 2018 as against Tk. 10.46, Tk. 37.47 and Tk. 10.00 respectively for the same period of the previous year.

CAPMBDBLMF: Dividend Declaration

News:The Trustee Committee of the fund has declared 7.00% cash dividend for the year ended on June 30, 2018. Record date: 04.09.2018. The Fund has reported EPU of Tk. 0.77, NAV per unit at market price of Tk. 10.33, NAV per unit at cost of Tk. 11.11 and NOCFPU of Tk. 0.91 for the year ended on June 30, 2018 as against Tk. 0.21, Tk. 10.21, Tk. 10.44 and Tk. (0.22) respectively for the same period of the previous year.

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	67.1	0.2%	45.6	75.3
Gold (\$/Ounce)	1222.6	0.1%	1211.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
84.4	97.8	108.6	1.2	62.6

*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://fx-rate.net

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