

BASL Daily Market Commentary

Thursday, January 10, 2019

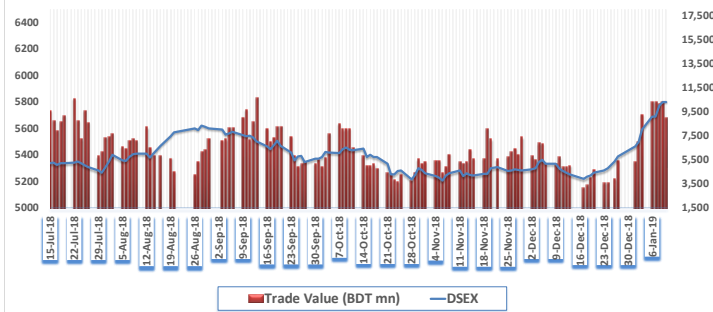
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Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index decreased by 1.3 points or 0.0% and closed at 5797.3 points today. Today the blue-chip index DS30 closed in green and closed at 2011.7 and the shariah based index DSES closed in green and closed at 1318.7. Turnover stood at BDT 8976 million (USD 108.1 million), about 12.49% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Jute sector (+3.6%) was the highest gainer, followed by IT (+2.6%) and General Insurance (+2.0%) respectively, whereas Paper & Printing (-0.9%) was the highest loser, followed by Mutual Funds (-0.9%) and Service & Real Estate (-0.9%). JMISMDL (0.4%) was the highest traded share with a turnover of BDT 269.2 million followed by BBSCABLES (0.0%) and OLYMPIC (-1.7%) respectively. Banks sector has highest turnover of 17.8% in the market. SAVAREER (+10.0%) was the today's top gainer while PLFSL (-4.5%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5797.3	5798.6	-1.3	0.0%	-7.2%
DSES	1318.7	1316.0	2.7	0.2%	-5.2%
DS30	2011.7	2011.1	0.6	0.0%	-11.9%

Total Scripts	Advanced	Declined	Unchanged
330	148	173	25

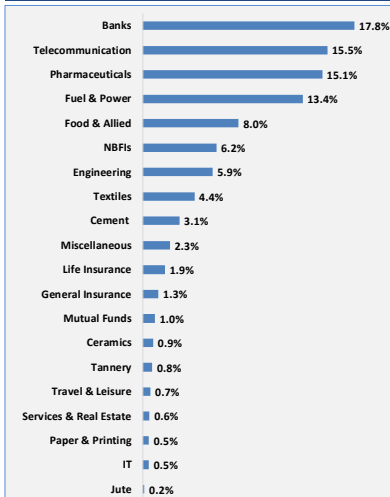
Market Indicators	Today	Last day	Today	Last day
Market PE	15.59	15.56	Market RSI (14)	84.11
				84.32

Market Statistics	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	4,105,319	4,098,890	6,429	0.16%
	Mn USD	49,462	49,384	77	
Turnover	Mn BDT	8,976	10,257	(1,282)	-12.49%
	Mn USD	108.1	123.6	(15.4)	
Volume	Mn Shares	224.8	278.7	(53.9)	-19%

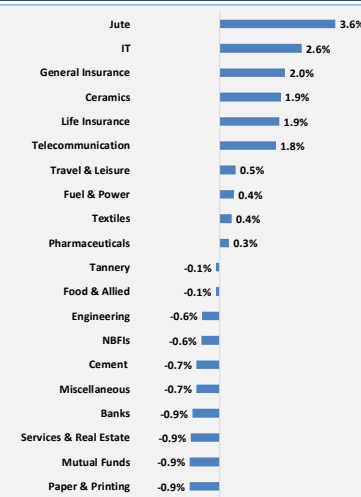
Sector Review

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	923.8	10.4%	-37.0%	623,683	17.8%	-0.9%	11.1
Cement	7	119.4	1.3%	-35.9%	108,206	3.1%	-0.7%	39.2
Ceramics	5	111.4	1.3%	76.2%	30,584	0.9%	1.9%	22.7
Engineering	36	1207.4	13.6%	-27.5%	205,471	5.9%	-0.6%	17.2
Food & Allied	17	502.4	5.6%	-18.5%	282,020	8.0%	-0.1%	20.9
Fuel & Power	19	814.8	9.2%	11.5%	471,372	13.4%	0.4%	11.6
General Insurance	35	510.3	5.7%	9.0%	46,273	1.3%	2.0%	13.9
IT	8	350.4	3.9%	5.6%	18,559	0.5%	2.6%	22.8
Jute	3	88.6	1.0%	58.0%	5,390	0.2%	3.6%	244.6
Life Insurance	12	508.4	5.7%	0.9%	65,325	1.9%	1.9%	n/m
Miscellaneous	13	292.9	3.3%	-26.4%	80,261	2.3%	-0.7%	23.1
Mutual Funds	37	36.8	0.4%	-33.5%	36,121	1.0%	-0.9%	16.2
NBFIs	23	481.8	5.4%	-31.3%	216,721	6.2%	-0.6%	26.6
Paper & Printing	3	37.9	0.4%	-24.7%	18,572	0.5%	-0.9%	25.7
Pharmaceuticals	31	1033.6	11.6%	-17.9%	528,753	15.1%	0.3%	17.6
Services & Real Estate	4	78.5	0.9%	-27.5%	20,153	0.6%	-0.9%	14.3
Tannery	6	90.5	1.0%	2.2%	28,094	0.8%	-0.1%	15.9
Telecommunication	2	227.4	2.6%	22.1%	544,030	15.5%	1.8%	15.5
Textiles	53	1424.0	16.0%	14.8%	152,484	4.4%	0.4%	17.7
Travel & Leisure	4	55.5	0.6%	9.7%	22,958	0.7%	0.5%	27.6

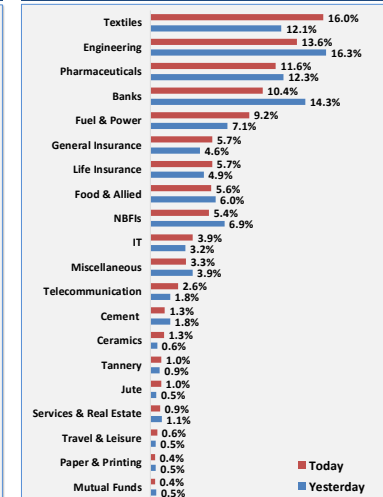
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



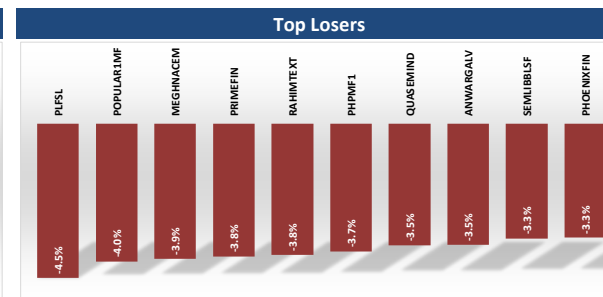
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
JMISMDL	388.6	-0.4%	269.2	3.0%
BBSABLES	110.6	0.0%	264.3	3.0%
OLYMPIC	258.4	-1.7%	188.2	2.1%
SHEPHERD	47.6	6.3%	183.7	2.1%
PTL	71.5	1.0%	160.4	1.8%
ACTIVEFINE	29.8	-1.0%	158.8	1.8%
SPCL	107.4	4.4%	145.1	1.6%
BRACBANK	79.8	1.5%	144.6	1.6%
NAHEEACP	68	6.4%	143.6	1.6%
SINGERBD	235.9	-1.2%	135.8	1.5%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	388.9	1.6%	525,132	15.0%
BATBC	3458	0.2%	207,480	5.9%
SQURPHARMA	262.7	0.3%	207,273	5.9%
UPGDCL	323.6	-0.5%	155,033	4.4%
ICB	138.2	-0.7%	96,419	2.8%
RENATA	1143.3	-0.3%	92,076	2.6%
BRACBANK	79.8	1.5%	85,586	2.4%
LHBL	46.6	-1.3%	54,120	1.5%
OLYMPIC	258.4	-1.7%	51,664	1.5%
SUMITPOWER	42.7	2.2%	45,598	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

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	51.6	-1.5%	42.4	76.9
Gold (\$/Ounce)	1297.1	0.4%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
84.0	96.9	107.1	1.2	60.3

*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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