

# BASL Daily Market Commentary

Monday, September 10, 2018

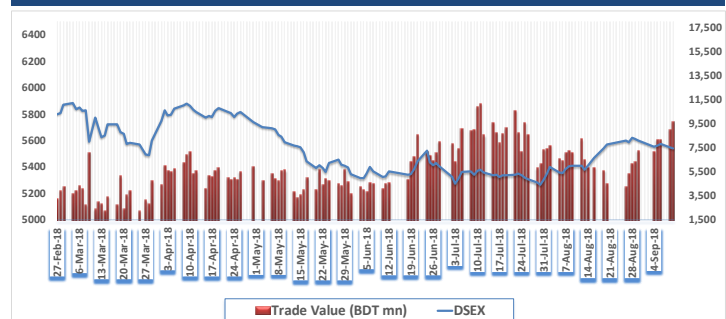
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## Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index declined by 9.7 points or 0.2% and closed at 5540.1 points today. The blue-chip index DS30 and the shariah based index DSES both closed in red closing to 1941.1 and 1272.2 respectively. Turnover stood at BDT 9654 million (USD 116.3 million), about 7.15% higher than the previous trading session's value. Most of the sectors witnessed bearish performance today. Life Insurance sector (+4.5%) was the highest gainer, followed by Engineering (+1.1%) and Ceramics (+1.1%), whereas Jute (-2.0%) was the highest loser, followed by Banks (-0.7%) and Mutual Funds (-0.6%). ACTIVEFINE (+1.9%) was the highest traded share with a turnover of BDT 781.2 million followed by KPCL (+2.3%) and BBSCABLES (+6.5%) respectively. Banks sector has highest turnover of 17.7% in the market. NATLIFEINS (+10.0%) was the today's top gainer while NHFIL (-8.8%) was the top loser today.

## Last Six Months Market Movement



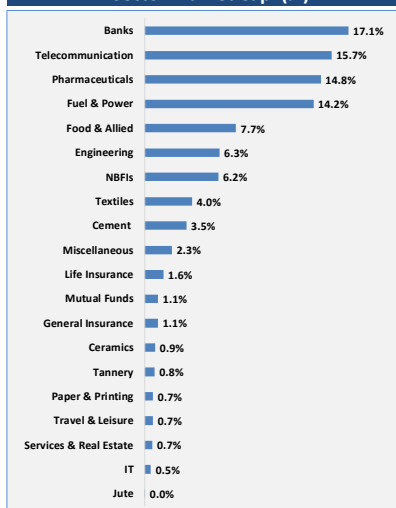
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5540.1	5549.8	-9.7	-0.2%	-11.3%
DSES	1272.2	1276.1	-3.9	-0.3%	-8.5%
DS30	1941.1	1947.4	-6.3	-0.3%	-15.0%
Total Scripts					
	330	106	177	46	
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	15.55	15.54	Market RSI (14)	57.28	58.40
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap					
Mn BDT	3,951,592	3,956,268	(4,676)	-0.12%	
Mn USD	47,610	47,666	(56)		
Turnover					
Mn BDT	9,654	9,009	644	7.15%	
Mn USD	116.3	108.5	7.8		
Volume					
Mn Shares	224.2	209.4	14.8	7%	

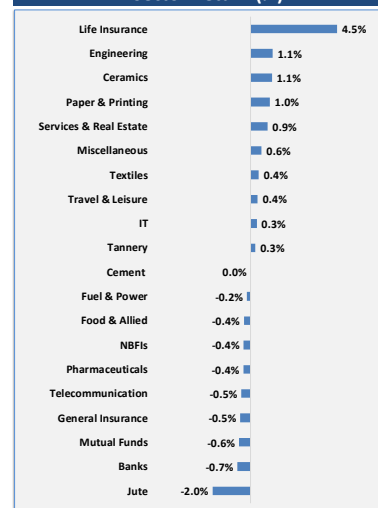
## Sector Review

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	477.2	5.0%	18.0%	574,875	17.1%	-0.7%	10.0
Cement	7	258.4	2.7%	-19.9%	117,792	3.5%	0.0%	37.8
Ceramics	5	71.5	0.8%	3.8%	29,543	0.9%	1.1%	32.3
Engineering	35	2160.7	22.7%	44.1%	210,696	6.3%	1.1%	20.3
Food & Allied	18	264.0	2.8%	66.1%	257,682	7.7%	-0.4%	18.5
Fuel & Power	18	1521.4	16.0%	-5.9%	476,477	14.2%	-0.2%	15.4
General Insurance	35	69.5	0.7%	77.7%	37,698	1.1%	-0.5%	10.2
IT	8	208.0	2.2%	2.7%	17,781	0.5%	0.3%	20.9
Jute	3	10.0	0.1%	-31.9%	1,628	0.0%	-2.0%	328.6
Life Insurance	12	108.5	1.1%	50.0%	53,100	1.6%	4.5%	n/m
Miscellaneous	12	293.3	3.1%	-22.8%	77,088	2.3%	0.6%	20.9
Mutual Funds	36	37.3	0.4%	-14.3%	37,883	1.1%	-0.6%	8.7
NBFIs	23	531.3	5.6%	31.5%	207,531	6.2%	-0.4%	17.8
Paper & Printing	2	76.1	0.8%	11.5%	24,009	0.7%	1.0%	47.5
Pharmaceuticals	28	1209.8	12.7%	0.5%	497,281	14.8%	-0.4%	17.8
Services & Real Estate	4	336.4	3.5%	32.2%	21,853	0.7%	0.9%	17.8
Tannery	6	218.2	2.3%	310.1%	28,170	0.8%	0.3%	16.9
Telecommunication	2	122.2	1.3%	-1.5%	527,493	15.7%	-0.5%	15.3
Textiles	48	1426.2	15.0%	-10.3%	133,308	4.0%	0.4%	20.5
Travel & Leisure	4	132.3	1.4%	-41.4%	23,471	0.7%	0.4%	31.2

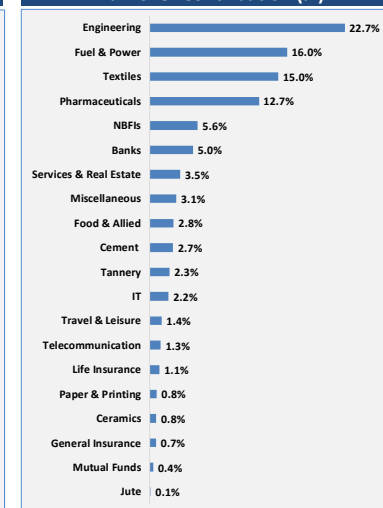
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



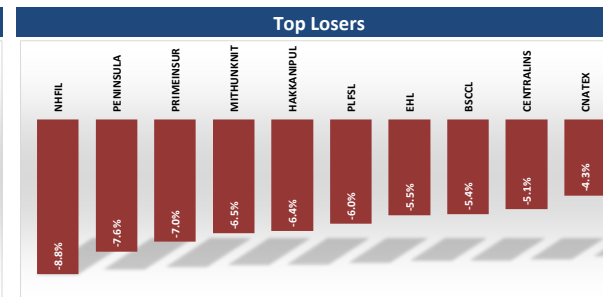
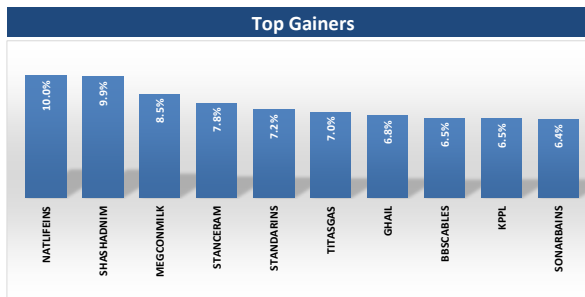
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
ACTIVEFINE	43.3	1.9%	781.2	8.2%
KPCL	105.4	2.3%	593.7	6.2%
BBSCABLES	128.9	6.5%	500.8	5.3%
SHASHADNIM	70	9.9%	336.4	3.5%
SUMITPOWER	42.7	-3.6%	281.7	3.0%
IFADAUTOS	125.6	-0.5%	257.8	2.7%
SAIFPOWER	30.4	6.3%	254.5	2.7%
NAHEEACP	77.8	1.8%	253.8	2.7%
CONFIDCEM	231.7	1.2%	214.0	2.2%
FORTUNE	36.9	4.8%	204.5	2.1%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	378.9	-0.3%	511,629	15.2%
SQURPHARMA	272.4	-0.8%	200,865	6.0%
BATBC	3290	-0.7%	197,400	5.9%
UPGDCL	314	-1.6%	150,433	4.5%
ICB	138.2	0.4%	91,827	2.7%
RENATA	1222	0.1%	85,578	2.6%
BRACBANK	72.2	-1.0%	77,435	2.3%
LHBL	52.8	-0.4%	61,321	1.8%
SUMITPOWER	42.7	-3.6%	45,598	1.4%
TITASGAS	42.7	7.0%	42,240	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
SANDHANINS	20% S	13.09.2018	30.09.2018	
DSSL	5% C 20% S	13.09.2018	12.11.2018	
KDSALTD	10% C & 5% S	18.09.2018	25.10.2018	
RUPALIIFE	8% C 4% S	26.09.2018	17.10.2018	

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

### NHFIL: Sale Declaration of a Director

Mr. Syed Ali Jowher Rizvi, one of the Directors of the Company, has expressed his intention to sell his entire holding of 28,84,860 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days. It is to be mentioned that Mr. Syed Ali Jowher Rizvi has already resigned from the Board of Directors of the Company.

### PUBALIBANK: Declaration of share transfer of a Nominated Director

Mr. Abdur Razzak Mondol, one of the Directors (nominated by That's It Fashions Ltd.) of the Company, has expressed his intention to transfer 3,15,000 shares of the Company to his son Mr. Md. Rakibul Hasan, by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of approval letter by DSE.

Comodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	68.5	1.1%	47.0	75.3
Gold (\$/Ounce)	1199.9	-0.4%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
84.3	97.6	109.1	1.2	60.0

\*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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