

BASL Daily Market Commentary

Thursday, September 13, 2018

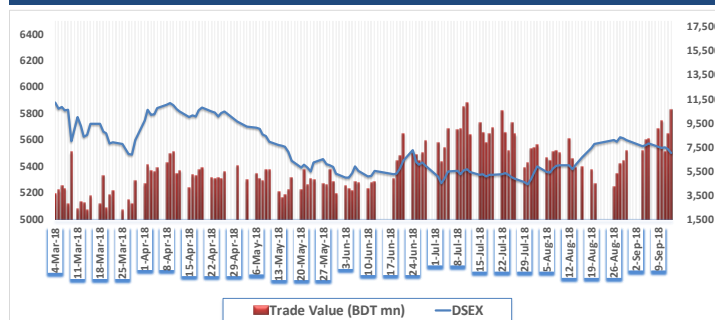
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000
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Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index declined by 29.2 points or 0.5% and closed at 5500.6 points today. The blue-chip index DS30 and the shariah based index DSES both closed in red closing to 1919.9 and 1271.4 respectively. Turnover stood at BDT 10648 million (USD 128.3 million), about 23.66% higher than the previous trading session's value. Most of the sectors witnessed bearish performance today. Service & Real Estate sector (+3.0%) was the highest gainer, followed by Travel & Leisure (+2.9%) and Life Insurance (+2.1%), whereas Banks (-2.0%) was the highest loser, followed by Telecommunication (-1.6%) and Jute (-1.4%). ACTIVEFINE (-1.7%) was the highest traded share with a turnover of BDT 884.0 million followed by IFADAUTO (+5.7%) and KPCL (+3.1%) respectively. Banks sector has highest turnover of 16.7% in the market. SALAMCRST (+10.0%) was the today's top gainer while RELIANCE1 (-9.3%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5500.6	5529.8	-29.2	-0.5%	-11.9%
DSES	1271.4	1275.9	-4.5	-0.4%	-8.6%
DS30	1919.9	1932.0	-12.1	-0.6%	-15.9%

	Total Scripts	Advanced	Declined	Unchanged
	330	104	189	33

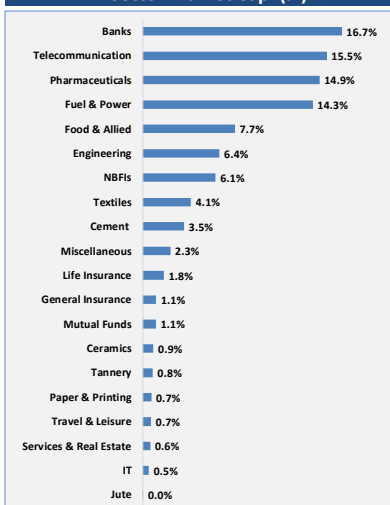
Market Indicators	Today	Last day	Today	Last day
Market PE	15.47	15.55	Market RSI (14)	65.27
				59.91

Market Statistics	Today	Last day	Change	Change (%)
Market Cap	Mn BDT	3,930,307	3,948,549	(18,241)
	Mn USD	47,353	47,573	(220)
Turnover	Mn BDT	10,648	8,611	2,038
	Mn USD	128.3	103.7	24.6
Volume	Mn Shares	221.4	188.5	32.9
				17%

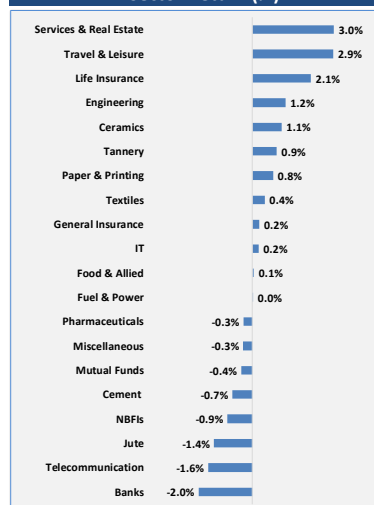
Sector Review

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	531.5	5.1%	21.9%	558,397	16.7%	-2.0%	9.7
Cement	7	178.2	1.7%	33.3%	116,024	3.5%	-0.7%	37.2
Ceramics	5	116.9	1.1%	16.0%	30,252	0.9%	1.1%	33.1
Engineering	35	2619.5	24.9%	46.7%	215,083	6.4%	1.2%	20.8
Food & Allied	18	373.0	3.5%	69.4%	258,370	7.7%	0.1%	18.6
Fuel & Power	18	1358.4	12.9%	-4.9%	477,367	14.3%	0.0%	15.4
General Insurance	35	86.2	0.8%	59.6%	37,918	1.1%	0.2%	10.3
IT	8	311.6	3.0%	39.6%	17,611	0.5%	0.2%	20.7
Jute	3	8.1	0.1%	-15.7%	1,664	0.0%	-1.4%	335.8
Life Insurance	12	211.3	2.0%	-36.6%	59,395	1.8%	2.1%	n/m
Miscellaneous	12	574.5	5.5%	75.8%	77,628	2.3%	-0.3%	21.1
Mutual Funds	36	25.1	0.2%	-48.8%	37,077	1.1%	-0.4%	8.6
NBFIs	23	511.5	4.9%	11.6%	204,191	6.1%	-0.9%	17.5
Paper & Printing	2	91.4	0.9%	29.6%	24,302	0.7%	0.8%	48.1
Pharmaceuticals	28	1462.9	13.9%	13.6%	496,387	14.9%	-0.3%	17.8
Services & Real Estate	4	152.4	1.4%	16.3%	21,443	0.6%	3.0%	17.5
Tannery	6	290.2	2.8%	248.7%	28,355	0.8%	0.9%	17.0
Telecommunication	2	89.0	0.8%	0.7%	516,351	15.5%	-1.6%	15.0
Textiles	48	1388.2	13.2%	21.5%	135,338	4.1%	0.4%	20.9
Travel & Leisure	4	135.3	1.3%	3.8%	23,490	0.7%	2.9%	31.2

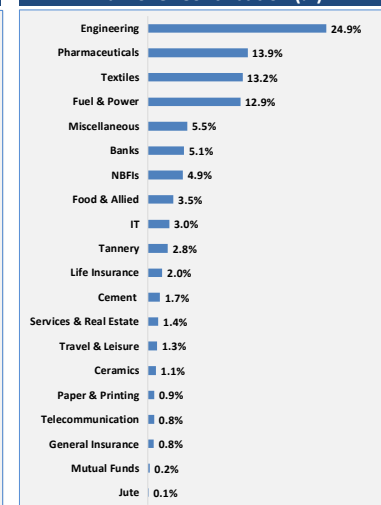
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



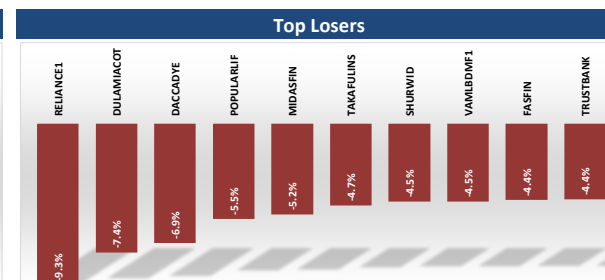
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
ACTIVEFINE	46.4	-1.7%	884.0	8.4%
IFADAUTOS	135.1	5.7%	800.5	7.6%
KPCL	122.1	3.1%	646.8	6.2%
BBSABLES	133.3	-2.3%	355.4	3.4%
SINGERBD	222.9	4.5%	352.9	3.4%
SHASHADNIM	71.8	1.7%	329.9	3.1%
AMANFEED	74.9	6.5%	278.6	2.6%
FORTUNE	38	5.6%	268.6	2.6%
PTL	68.4	5.4%	261.6	2.5%
UPGDCL	306	-1.7%	247.4	2.4%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	370.6	-1.6%	500,421	15.0%
SQURPHARMA	270.1	-0.7%	199,169	6.0%
BATBC	3296.5	-0.2%	197,790	5.9%
UPGDCL	306	-1.7%	146,601	4.4%
ICB	135.5	-0.6%	90,033	2.7%
RENATA	1218.3	-0.4%	85,319	2.6%
BRACBANK	70.3	-2.6%	75,397	2.3%
LHBL	52.8	0.0%	61,321	1.8%
SUMITPOWER	43.7	2.6%	46,666	1.4%
KPCL	122.1	3.1%	44,113	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	
RUPALIILIFE	8% C 4% S	26.09.2018	17.10.2018	
MEGHNACEM	10% S	04.10.2018	31.10.2018	

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

MEGHNACEM: Dividend Declaration

The Board of Directors has recommended 10% stock dividend for the year ended on June 30, 2018. Date of AGM & EGM: 31.10.2018, Time of AGM & EGM: 10:00 AM & 11:00 AM respectively, Venue: "Pushpogusso", International Convention City Bashundhara (ICCB) Hall No.-2, Dhaka. Record Date of AGM & EGM: 04.10.2018. (cont.)

PEOPLESINS: Buy Declaration of a Director

Mr. Jafar Ahmed Patwari, one of the Directors of the Company, has expressed his intention to buy 1,00,000 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	69.3	-1.6%	48.1	75.3
Gold (\$/Ounce)	1211.6	0.1%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.7	97.2	109.2	1.2	60.2

*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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