

# BASL Daily Market Commentary

Tuesday, December 18, 2018

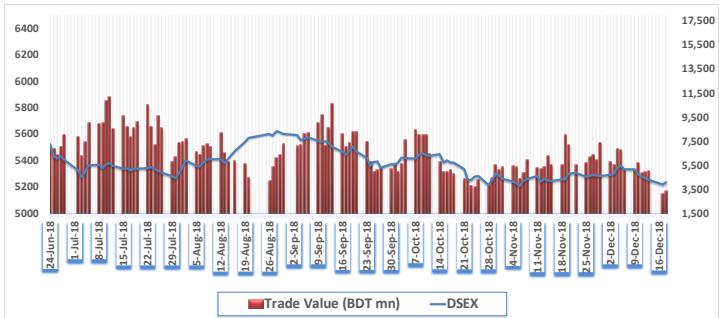
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
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## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 15.6 points or 0.3% and closed at 5233.6 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1843.4 and 1205.2 respectively. Turnover stood at BDT million 3341 (USD 40.3 million), about 6.21% higher than the previous trading session's value. Most of the sectors witnessed bullish performance today. Life Insurance sector (+3.1%) was the highest gainer followed by Ceramics (+2.4%), IT (+1.5%) respectively. Whereas Jute (-1.3%) was the highest loser, followed by General Insurance (-0.9%) and Food & Allied (-0.5%) respectively. MEGHNALIFE (+4.8%) was the highest traded share with a turnover of BDT 153.8 million followed by UPGDCL (+2.2%) and IFADAUTOS (-0.6%) respectively. Banks sector has highest turnover of 17.2% in the market. VAMLBDMF1 (+4.3%) was the today's top gainer while EXIM1STMF (-2.0%) was the top loser today.

## Last Six Months Market Movement



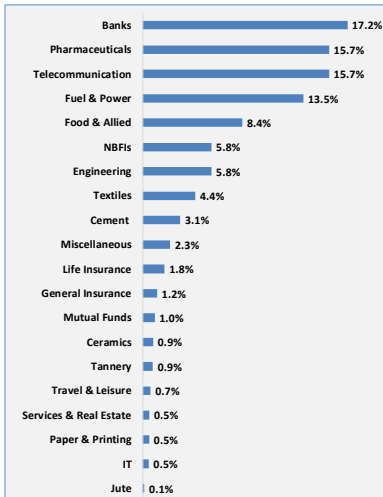
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5233.6	5218.0	15.6	0.3%	-16.2%
DSES	1205.2	1201.5	3.7	0.3%	-13.3%
DS30	1843.4	1842.2	1.3	0.1%	-19.3%
<b>Total Scripts</b>					
	330	180	103	57	
<b>Market Indicators</b>					
	Today	Last day	Today	Last day	
Market PE	14.20	14.17	Market RSI (14)	39.90	36.16
<b>Market Statistics</b>					
	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,788,345	3,780,161	8,184	0.22%
	Mn USD	45,643	45,544	99	
Turnover	Mn BDT	3,341	3,146	195	6.21%
	Mn USD	40.3	37.9	2.4	
Volume	Mn Shares	84.4	86.0	(1.6)	-2%

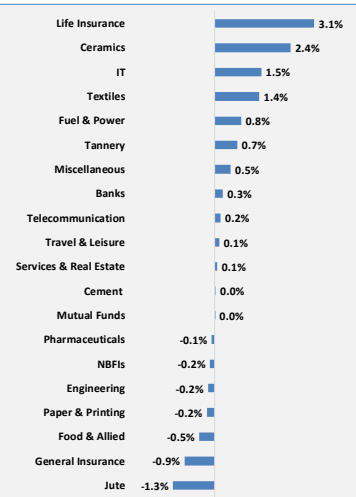
## Sector Review

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	203.0	6.6%	-24.7%	548,512	17.2%	0.3%	9.8
Cement	7	33.3	1.1%	-25.6%	100,488	3.1%	0.0%	36.4
Ceramics	5	43.8	1.4%	19.9%	27,692	0.9%	2.4%	20.5
Engineering	36	353.6	11.5%	44.6%	184,054	5.8%	-0.2%	15.4
Food & Allied	17	106.6	3.5%	-26.7%	266,417	8.4%	-0.5%	19.8
Fuel & Power	19	301.3	9.8%	-2.3%	430,671	13.5%	0.8%	10.6
General Insurance	35	97.6	3.2%	-32.3%	38,701	1.2%	-0.9%	11.7
IT	8	121.1	3.9%	23.6%	16,430	0.5%	1.5%	20.2
Jute	3	77.9	2.5%	77.4%	4,538	0.1%	-1.3%	206.0
Life Insurance	12	402.5	13.1%	91.9%	58,553	1.8%	3.1%	n/m
Miscellaneous	13	105.0	3.4%	-20.6%	73,840	2.3%	0.5%	21.2
Mutual Funds	37	19.3	0.6%	-54.3%	32,008	1.0%	0.0%	14.4
NBFIs	23	94.7	3.1%	-23.7%	184,128	5.8%	-0.2%	22.6
Paper & Printing	3	12.3	0.4%	9.4%	17,391	0.5%	-0.2%	24.1
Pharmaceuticals	31	406.2	13.2%	-30.0%	500,202	15.7%	-0.1%	16.7
Services & Real Estate	4	14.5	0.5%	24.0%	17,521	0.5%	0.1%	12.4
Tannery	6	52.4	1.7%	77.3%	27,430	0.9%	0.7%	15.5
Telecommunication	2	49.7	1.6%	-17.1%	499,898	15.7%	0.2%	14.2
Textiles	53	557.4	18.2%	7.1%	140,660	4.4%	1.4%	16.3
Travel & Leisure	4	16.2	0.5%	-42.4%	21,350	0.7%	0.1%	25.7

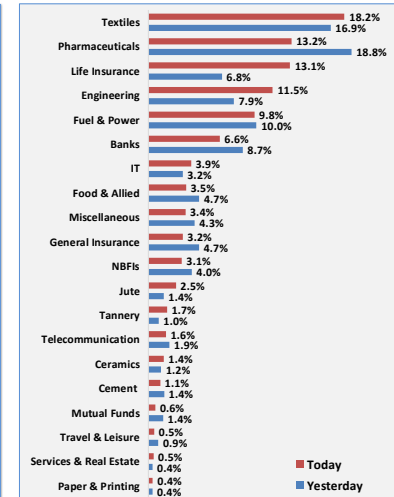
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



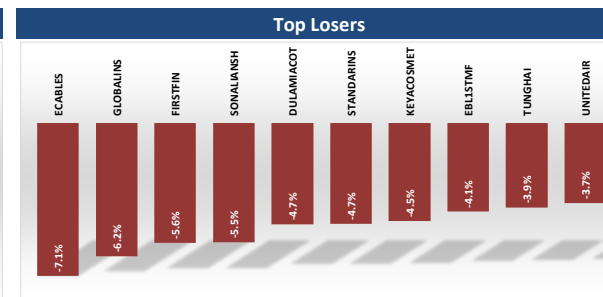
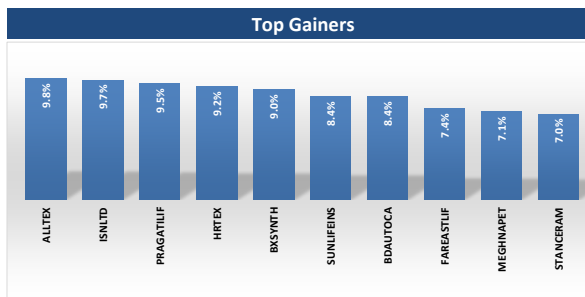
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
MEGHNALIFE	80.5	4.8%	153.8	5.0%
UPGDCL	302.9	2.2%	111.8	3.6%
IFADAUTOS	107.6	-0.6%	82.5	2.7%
SQURPHARMA	250.8	0.0%	79.8	2.6%
SONALIANSH	619.3	-5.5%	73.9	2.4%
ANLIMAYARN	44.6	2.8%	64.4	2.1%
RUPALILIFE	92.5	3.4%	59.0	1.9%
KPCL	53.9	-1.1%	56.4	1.8%
VFSTDL	59.1	1.7%	53.2	1.7%
WMSHIPYARD	20.1	4.7%	52.7	1.7%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	359.6	0.2%	485,568	15.2%
BATBC	3374.5	-0.7%	202,470	6.3%
SQURPHARMA	250.8	0.0%	197,883	6.2%
UPGDCL	302.9	2.2%	145,115	4.5%
RENATA	1138.9	-0.3%	91,722	2.9%
BRACBANK	72.7	-0.4%	77,971	2.4%
ICB	110.6	-0.5%	77,163	2.4%
LHBL	43.1	-0.2%	50,055	1.6%
OLYMPIC	217.9	0.2%	43,567	1.4%
SUMITPOWER	38.5	0.0%	41,113	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

### SALAMCRST: Credit Rating Result

Alpha Credit Rating Limited (AlphaRating) has rated the Company as "A+" in the long term and "ST-3" in the short term along with a stable outlook based on audited financial statements of the Company of June 30, 2018 and relevant qualitative information up to December 17, 2018.

### SINOBANGLA: Credit Rating Result

Credit Rating Information and Services Limited (CRISL) has rated the Company as "A" in the long term and "ST-3" in the short term along with a stable outlook in consideration of its audited financials up to June 30, 2018, unaudited financials up to September 30, 2018 and other relevant quantitative as well as qualitative information up to the date of rating declaration.

## Commodity Prices

Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	49.0	-1.8%	49.0	76.9
Gold (\$/Ounce)	1252.4	0.1%	1167.0	1369.0

## Exchange Rates

USD	EURO	GBP	RUPEE	CAD
83.8	95.3	106.0	1.2	60.4

\*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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