

# BASL Daily Market Commentary

Monday, May 20, 2019

Hadi Mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
info@basl-bd.com, Tel- 9515826-2, www.basl-bd.com

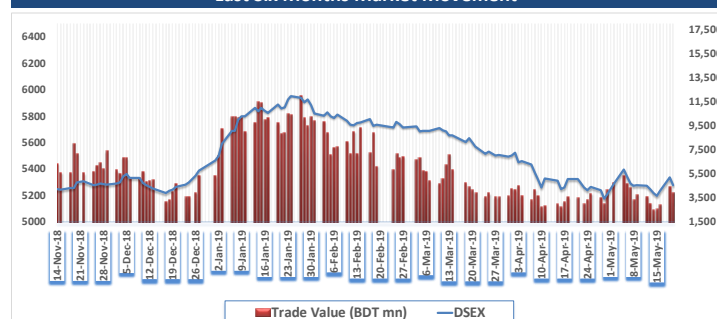


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## Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index increased by 59.6 points or 1.1% and closed at 5276.1 points today. The blue-chip index DS30 and the shariah based index DSES both closed in red, closing to 1833.4 and 1199.2 respectively. Turnover stood at BDT million 3877 (USD 46.7 million), about 12.59% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Today there is no gainer sector whereas General Insurance Sector (-2.6%) was the highest loser followed by Bank Sector (-1.8%) and Textile Sector (-1.2%) respectively. BRACBANK (-2.8%) was the highest traded share with a turnover of BDT 400.2 million followed by SKTRIMS (+4.5%) and FORTUNE (-0.8%) respectively. Banks sector has highest turnover of 17.6% in the market. EMERALDOIL (+10.0%) was the today's top gainer while ALARABABANK (-9.3%) was the top loser today.

## Last Six Months Market Movement



## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5276.1	5335.7	-59.6	-1.1%	-15.5%
DSES	1199.2	1215.1	-16.0	-1.3%	-13.8%
DS30	1833.4	1849.9	-16.5	-0.9%	-19.7%

Total Scripts	Advanced	Declined	Unchanged
330	50	262	30

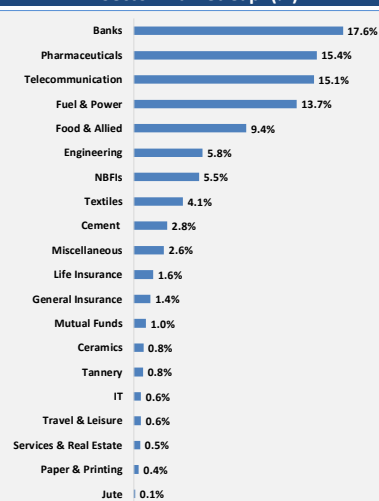
Market Indicators	Today	Last day	Today	Last day
Market PE	13.81	13.82	Market RSI (14)	46.87
				52.28

Market Statistics	Today	Last day	Change	Change (%)
Market Cap				
Mn BDT	3,848,789	3,835,076	13,713	0.36%
Mn USD	46,371	46,206	165	
Turnover				
Mn BDT	3,877	4,436	(558)	-12.59%
Mn USD	46.7	53.4	(6.7)	
Volume				
Mn Shares	131.9	177.4	(45.6)	-26%

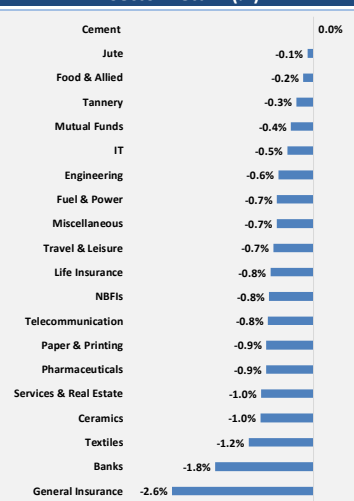
## Sector Review

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	920.6	30.1%	-11.4%	571,641	17.6%	-1.8%	9.8
Cement	7	22.8	0.7%	-56.8%	91,100	2.8%	0.0%	27.6
Ceramics	5	62.2	2.0%	-30.7%	26,829	0.8%	-1.0%	22.4
Engineering	36	268.0	8.8%	-26.0%	188,144	5.8%	-0.6%	16.5
Food & Allied	17	78.8	2.6%	-27.6%	307,246	9.4%	-0.2%	11.3
Fuel & Power	19	234.1	7.7%	-13.7%	445,683	13.7%	-0.7%	12.2
General Insurance	35	157.5	5.1%	-53.0%	46,254	1.4%	-2.6%	12.3
IT	8	68.7	2.2%	-32.1%	20,140	0.6%	-0.5%	20.6
Jute	3	4.2	0.1%	-41.0%	3,824	0.1%	-0.1%	73.9
Life Insurance	12	69.8	2.3%	210.8%	53,614	1.6%	-0.8%	n/m
Miscellaneous	13	369.6	12.1%	28.0%	83,085	2.6%	-0.7%	23.8
Mutual Funds	37	30.8	1.0%	111.4%	33,279	1.0%	-0.4%	11.9
NBFIs	23	119.0	3.9%	-46.7%	178,386	5.5%	-0.8%	19.2
Paper & Printing	3	7.5	0.2%	-24.9%	13,699	0.4%	-0.9%	38.4
Pharmaceuticals	31	219.4	7.2%	-41.1%	500,647	15.4%	-0.9%	17.4
Services & Real Estate	4	8.8	0.3%	-33.9%	17,516	0.5%	-1.0%	17.0
Tannery	6	148.8	4.9%	-40.3%	25,458	0.8%	-0.3%	32.9
Telecommunication	2	39.2	1.3%	-44.6%	492,661	15.1%	-0.8%	13.6
Textiles	53	216.8	7.1%	-31.5%	134,672	4.1%	-1.2%	17.9
Travel & Leisure	4	11.6	0.4%	7.4%	20,119	0.6%	-0.7%	24.1

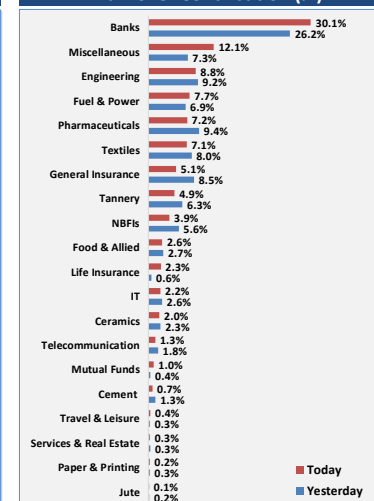
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



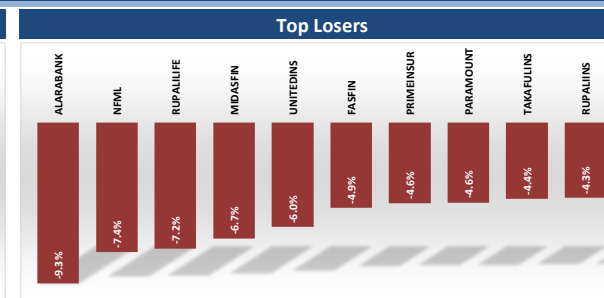
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
BRACBANK	58.1	-2.8%	400.2	13.1%
SKTRIMS	50.6	4.5%	192.8	6.3%
FORTUNE	37.9	-0.8%	113.0	3.7%
BANKASIA	21.2	-0.5%	83.4	2.7%
IFIC	12.3	-2.4%	75.0	2.5%
DOREENPWR	83.1	-0.7%	72.3	2.4%
PREMIERBAN	12.3	-1.6%	49.1	1.6%
RUPALLIFE	79.4	-7.2%	48.9	1.6%
MONNOCERA	234.3	-0.5%	48.7	1.6%
ESQUIRENIT	47.2	1.7%	47.5	1.6%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	348	-0.9%	469,904	14.4%
BATBC	1347.4	-0.1%	242,532	7.5%
SQURPHARMA	249.5	-1.1%	196,858	6.0%
UPGDCL	316.5	-0.9%	151,631	4.7%
RENATA	1164.3	-0.3%	93,768	2.9%
ICB	110.2	-0.1%	76,884	2.4%
BRACBANK	58.1	-2.8%	62,312	1.9%
LHBL	40.4	0.0%	46,919	1.4%
MARICO	1397	-0.5%	44,006	1.4%
OLYMPIC	220	-0.5%	43,987	1.4%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
UCB	10%S	22.05.2019	30.06.2019	
AGRANINS	5%S	15.05.2019	16.06.2019	
SONARBAINS	6%C, 6%S	27.05.2019	27.07.2017	
STANDBANKL	10%S	30.05.2019	20.06.2019	
KARNAPHULI	6%C, 5%S	20.05.2019	26.06.2019	
FEDERALINS	5%S	22.05.2019	26.06.2019	
REPUBLIC	10%S	23.05.2019	27.06.2019	
FEDERALINS	5%S	22.05.2019	26.06.2019	
IFIC	10%S	23.05.2019	29.06.2019	
MTB	11%S	03.06.2019	30.06.2019	

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

### PTL: Credit Rating Result

Alpha Credit Rating Limited (AlphaRating) has rated the Company as "AA" in the long term and "ST-1" in the short term along with a stable outlook based on audited financial statements of the Company as on June 30, 2018 and relevant qualitative information till May 04, 2019.

## Commodity Prices

Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	63.6	1.1%	42.4	76.9
Gold (\$/Ounce)	1275.2	0.0%	1167.0	1350.0

## Exchange Rates

USD	EURO	GBP	RUPEE	CAD
83.4	94.1	107.5	1.2	58.4

\*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

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