

BASL Daily Market Commentary

Monday, August 20, 2018

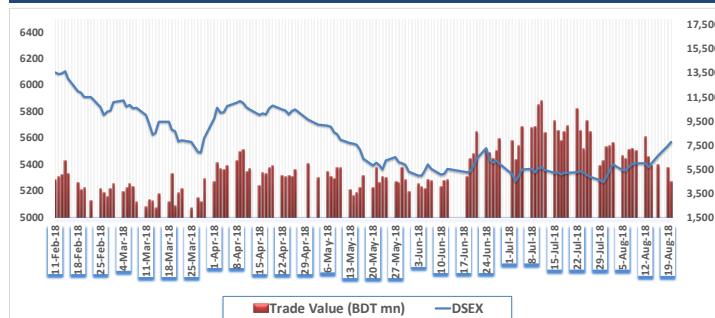
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Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index advanced by 32.7 points or 0.6% and closed at 5571.2 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green closing to 1948.2 and 1257.6 respectively. Turnover stood at BDT 4453 million (USD 53.7 million), about 20.56% lower than the previous trading session's value. Most of the sectors witnessed bullish performance today. IT sector (+3.2%) was the highest gainer, followed by Miscellaneous (+2.9%) and Paper & Printing (+2.7%), whereas Ceramics (-2.5%) was the highest loser, followed by General Insurance (-1.1%) and Life Insurance (-0.3%). LANKABAFIN (+1.0%) was the highest traded share with a turnover of BDT 184.2 million followed by BBSCABLES (+4.9%) and CITYBANK (+1.7%) respectively. Banks sector has highest turnover of 18.6% in the market. MIDASFIN (+10.0%) was the today's top gainer while AZIZPIPES (-10.0%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5571.2	5538.5	32.7	0.6%	-10.8%
DSES	1257.6	1250.6	7.1	0.6%	-9.6%
DS30	1948.2	1938.4	9.8	0.5%	-14.7%

Total Scripts	Advanced	Declined	Unchanged
330	198	97	40

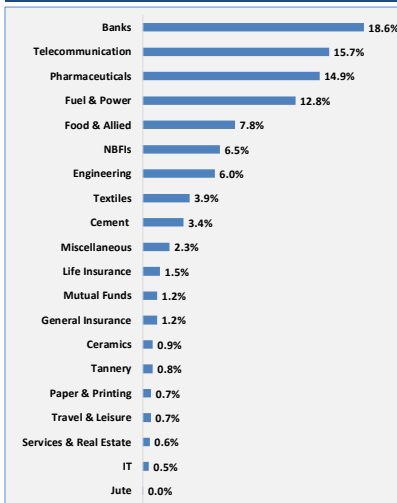
Market Indicators	Today	Last day	Today	Last day
Market PE	15.44	15.39	Market RSI (14)	72.60
				72.23

Market Statistics	Today	Last day	Change	Change (%)
Market Cap				
Mn BDT	3,921,407	3,898,505	22,902	0.59%
Mn USD	47,246	46,970	276	
Turnover				
Mn BDT	4,453	5,606	(1,153)	-20.56%
Mn USD	53.7	67.5	(13.9)	
Volume				
Mn Shares	155.0	208.4	(53.5)	-26%

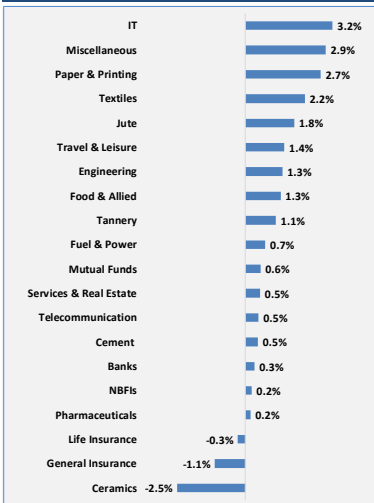
Sector Review

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	1231.0	28.3%	-16.6%	618,440	18.6%	0.3%	10.7
Cement	7	26.3	0.6%	-58.2%	114,250	3.4%	0.5%	36.7
Ceramics	5	29.8	0.7%	34.2%	28,361	0.9%	-2.5%	31.0
Engineering	35	477.9	11.0%	-33.0%	201,290	6.0%	1.3%	18.5
Food & Allied	18	80.9	1.9%	-42.2%	257,888	7.8%	1.3%	18.5
Fuel & Power	18	244.6	5.6%	-6.6%	426,996	12.8%	0.7%	14.2
General Insurance	35	84.0	1.9%	-60.0%	39,772	1.2%	-1.1%	10.8
IT	8	101.3	2.3%	-21.8%	17,162	0.5%	3.2%	20.1
Jute	3	17.7	0.4%	16.7%	1,533	0.0%	1.8%	309.4
Life Insurance	12	26.1	0.6%	-29.9%	48,731	1.5%	-0.3%	n/m
Miscellaneous	12	161.1	3.7%	-22.2%	75,520	2.3%	2.9%	20.5
Mutual Funds	36	44.3	1.0%	-18.0%	40,386	1.2%	0.6%	9.2
NBFIs	23	700.1	16.1%	-17.6%	215,682	6.5%	0.2%	18.5
Paper & Printing	2	57.3	1.3%	-10.1%	23,532	0.7%	2.7%	46.6
Pharmaceuticals	28	294.5	6.8%	-5.0%	494,928	14.9%	0.2%	17.7
Services & Real Estate	4	17.1	0.4%	-35.1%	19,868	0.6%	0.5%	16.2
Tannery	6	37.3	0.9%	-41.9%	28,183	0.8%	1.1%	16.9
Telecommunication	2	31.3	0.7%	-7.9%	521,414	15.7%	0.5%	15.1
Textiles	48	632.6	14.6%	-25.3%	131,035	3.9%	2.2%	20.2
Travel & Leisure	4	50.1	1.2%	-12.0%	22,548	0.7%	1.4%	29.9

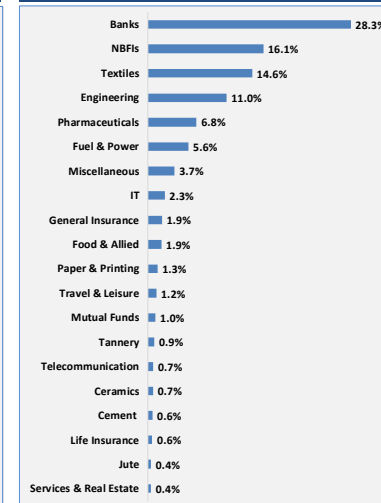
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



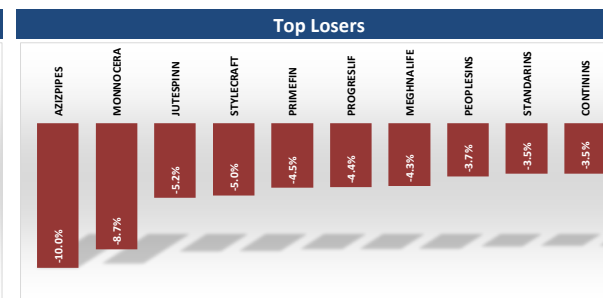
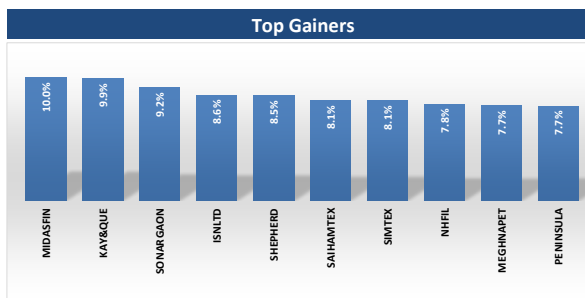
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
LANKABAFIN	30	1.0%	184.2	4.2%
BSCABLES	117.7	4.9%	145.4	3.3%
CITYBANK	35.7	1.7%	133.8	3.1%
NHFIL	56.4	7.8%	133.7	3.1%
DHAKABANK	17	-0.6%	132.7	3.1%
BRACBANK	77.3	0.5%	112.6	2.6%
UPGDCL	330.8	1.4%	110.4	2.5%
MERCANBANK	20.4	-0.5%	89.9	2.1%
SHEPHERD	34.3	8.5%	78.5	1.8%
SAHAMTEX	30.6	8.1%	72.4	1.7%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	375.4	0.4%	506,903	15.2%
SQURPHARMA	276.2	-0.1%	203,667	6.1%
BATBC	3306.2	1.1%	198,372	6.0%
UPGDCL	330.8	1.4%	132,068	4.0%
ICB	144	-0.3%	95,681	2.9%
RENATA	1229.3	-0.1%	86,089	2.6%
BRACBANK	77.3	0.5%	82,904	2.5%
LHBL	53.7	0.0%	62,366	1.9%
ISLAMIBANK	26.7	1.9%	42,987	1.3%
SUMITPOWER	38.5	0.3%	41,113	1.2%

Upcoming Record Date & AGM date for Dividends/Right Offerings			
Scrip	Declaration	Record Date	AGM Date
NATLIFEINS	20% C & 15% S	20.08.2018	26.09.2018
PRAGATILIF	15% C & 10% S	27.08.2018	27.09.2018
SUNLIFEINS	2% S	28.08.2018	19.09.2018
UPGDCL	90% C 20% S	06.09.2018	30.10.2018
SANDHANINS	20% S	13.09.2018	30.09.2018
DSSL	5% C 20% S	13.09.2018	12.11.2018

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

BARKAPOWERS: Signing of PPA with BPDB and IA with the GOB by Baraka Shikalbaha

With reference to their earlier disclosure disseminated on March 01, 2018 regarding issuance of LOI to Baraka Patenga Power Limited and its consortium by BPDB vide memo dated February 28, 2018, the Company has further informed that Baraka Shikalbaha Power Limited (a 51% subsidiary of Baraka Patenga Power Limited formed to implement the 105 MW power plant project at Shikalbaha, Chittagong) (cont. 1)

DHAKABANK: Buy Confirmation of a Sponsor

Mrs. Rakhi Das Gupta, one of the Sponsors of the Company, has further reported that she has completed her buying of 75,000 shares of the Company at prevailing market price through Stock Exchange as announced earlier.

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	66.0	0.1%	45.6	75.3
Gold (\$/Ounce)	1195.0	0.9%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.5	95.3	106.4	1.2	61.0

*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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