

# BASL Daily Market Commentary

Thursday, November 22, 2018

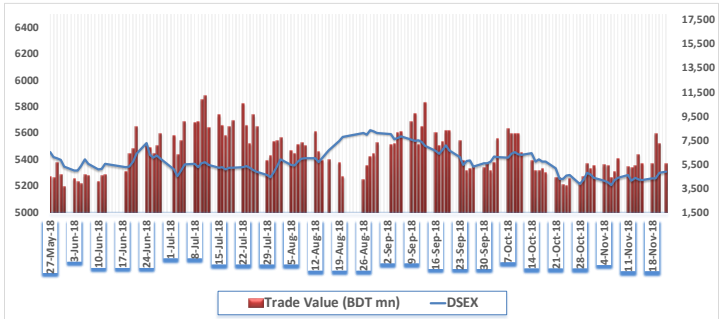
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
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## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 7.1 points or 0.1% and closed at 5306.0 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1869.0 and 1227.6 respectively. Turnover stood at BDT million 5526 (USD 66.6 million), about 22.94% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Telecommunication sector (+1.9%) was the highest gainer followed by Tannery (+1.8%), Pharmaceuticals (+0.8%) respectively. Whereas Jute (-6.6%) was the highest loser and followed by IT (-1.4%) and Fuel & Power (-1.0%) respectively. UPGDCL (-3.6%) was the highest traded share with a turnover of BDT 321.4 million followed by SQUPHARMA (+1.4%) and WATACHEM (+8.0%) respectively. Banks sector has highest turnover of 17.1% in the market. SHURWID (+9.9%) was the today's top gainer while JUTESPINN (-7.7%) was the top loser today.

## Last Six Months Market Movement



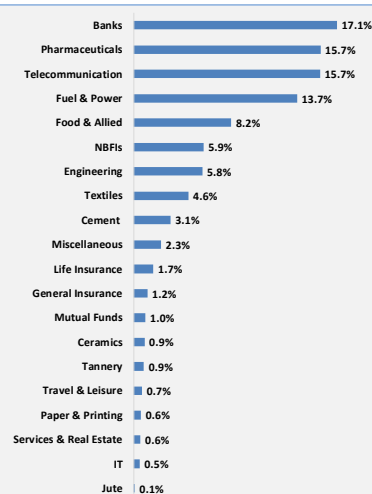
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5306.0	5298.8	7.1	0.1%	-15.0%
DSES	1227.6	1221.2	6.4	0.5%	-11.7%
DS30	1869.0	1868.9	0.1	0.0%	-18.1%
<b>Total Scripts</b>	<b>Advanced</b>	<b>Declined</b>	<b>Unchanged</b>		
	330	117	154	54	
<b>Market Indicators</b>	<b>Today</b>	<b>Last day</b>	<b>Today</b>	<b>Last day</b>	
Market PE	14.63	14.61	Market RSI (14)	53.00	51.87
<b>Market Statistics</b>	<b>Today</b>	<b>Last day</b>	<b>Change</b>	<b>Change (%)</b>	
Market Cap	Mn BDT	3,830,015	3,822,936	7,079	0.19%
	Mn USD	46,145	46,059	85	
Turnover	Mn BDT	5,526	7,172	(1,645)	-22.94%
	Mn USD	66.6	86.4	(19.8)	
Volume	Mn Shares	128.9	168.0	(39.1)	-23%

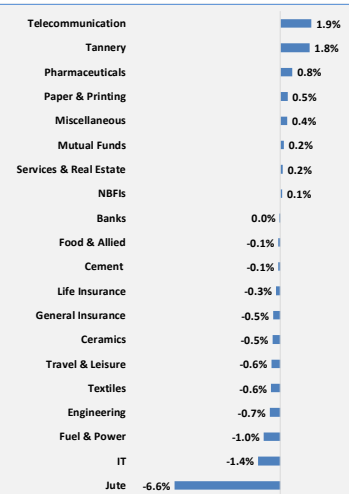
## Sector Review

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	383.9	7.1%	-51.3%	552,581	17.1%	0.0%	9.9
Cement	7	16.3	0.3%	-83.5%	100,099	3.1%	-0.1%	37.4
Ceramics	5	91.4	1.7%	-22.6%	29,412	0.9%	-0.5%	22.0
Engineering	35	466.1	8.6%	-12.7%	186,266	5.8%	-0.7%	15.6
Food & Allied	18	270.8	5.0%	-18.3%	265,006	8.2%	-0.1%	22.9
Fuel & Power	18	614.3	11.3%	-45.3%	443,903	13.7%	-1.0%	10.9
General Insurance	35	61.9	1.1%	19.5%	37,221	1.2%	-0.5%	11.2
IT	8	280.0	5.1%	21.9%	16,188	0.5%	-1.4%	19.9
Jute	3	58.7	1.1%	-3.0%	3,119	0.1%	-6.6%	139.6
Life Insurance	12	63.3	1.2%	-37.7%	53,511	1.7%	-0.3%	n/m
Miscellaneous	12	182.7	3.4%	-56.2%	74,602	2.3%	0.4%	22.5
Mutual Funds	36	10.0	0.2%	-8.9%	31,884	1.0%	0.2%	12.9
NBFIs	23	301.5	5.5%	3.8%	189,543	5.9%	0.1%	23.3
Paper & Printing	2	33.0	0.6%	-29.3%	19,742	0.6%	0.5%	27.3
Pharmaceuticals	28	1155.8	21.2%	18.4%	507,729	15.7%	0.8%	17.6
Services & Real Estate	4	34.4	0.6%	-28.8%	18,192	0.6%	0.2%	12.9
Tannery	6	37.4	0.7%	-81.6%	27,831	0.9%	1.8%	16.1
Telecommunication	2	59.5	1.1%	-56.2%	506,304	15.7%	1.9%	14.4
Textiles	48	1237.1	22.7%	-6.8%	148,731	4.6%	-0.6%	17.6
Travel & Leisure	4	84.6	1.6%	8.9%	22,292	0.7%	-0.6%	26.8

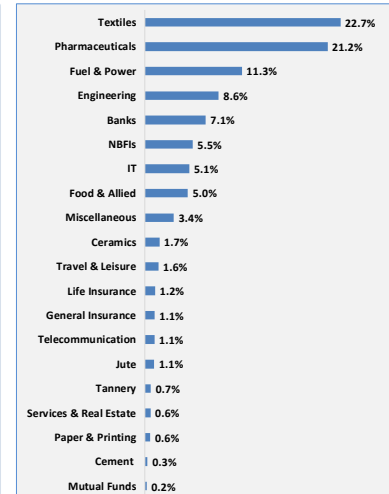
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



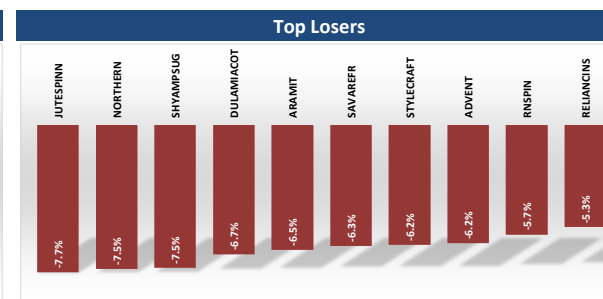
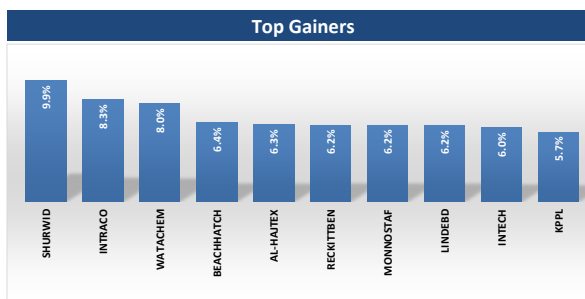
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
UPGDCL	305.7	-3.6%	321.4	5.9%
SQRPHARMA	278.2	1.4%	242.3	4.5%
WATACHEM	465.8	8.0%	225.9	4.2%
INTECH	65.5	6.0%	224.4	4.1%
SAIHAMCOT	25.1	0.4%	168.4	3.1%
BRACBANK	71.4	-1.1%	135.3	2.5%
KTL	32.5	4.5%	135.1	2.5%
SHEPHERD	42.3	-3.4%	115.1	2.1%
PTL	61.2	3.4%	110.3	2.0%
SILVAPHL	35.2	-2.8%	99.4	1.8%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	364.1	2.0%	491,644	15.2%
SQRPHARMA	278.2	1.4%	205,142	6.3%
BATBC	3344.9	0.2%	200,694	6.2%
UPGDCL	305.7	-3.6%	146,457	4.5%
RENATA	1127.7	0.3%	90,820	2.8%
ICB	115.2	-0.5%	80,372	2.5%
BRACBANK	71.4	-1.1%	76,577	2.4%
LHBL	42	0.0%	48,778	1.5%
OLYMPIC	221.5	-1.5%	44,286	1.4%
SUMITPOWER	38.3	-1.3%	40,900	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings			
Scrip	Declaration	Record Date	AGM Date
SQUARETEXT	20%C 5%S	27.11.2018	20.12.2018
BPML	20%C	22.11.2018	19.12.2018
SQUARETEXT	20%C 5%S	27.11.2018	20.12.2018
SQRPHARMA	36%C 7%S	27.11.2018	20.12.2018
AMANFEED	20%C 10% S	25.11.2018	19.12.2018
GEMINISEA	15%S	20.11.2018	13.12.2018
HRTEX	10%C	28.11.2018	23.01.2019
GHAIL	10%S	19.11.2018	19.12.2018
MLDYEING	20%S	22.11.2018	29.12.2018
BXPBARMA	12.5%C	26.11.2018	22.12.2018

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

### DSENEWS: Commencement of electronic subscription of Genex Infosys Limited

Commencement of electronic subscription of Genex Infosys Limited through electronic subscription system under fixed price method: The subscription for shares of Genex Infosys Limited by the eligible investors through electronic subscription system under fixed price method of the stock exchanges will be started from 10:00 a.m. of November 18, 2018 and continued till 5:30 p.m. of November 29, 2018 (round the clock). (cont)

### DSENEWS: Commencement of electronic subscription of Genex Infosys Limited

(Continuation of DSENEWS): The required 100% of subscribed amount shall be paid through Mutual Trust Bank Limited, (Account Name: Dhaka Stock Exchange Limited, Account No. 00120320001838) in between 10:00 a.m. of November 18, 2018 to 2:00 p.m. of November 29, 2018 (during banking hour). Please visit the following website for subscription related updates <http://www.essbangladesh.com>. (End)

Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	53.8	-1.5%	52.8	76.9
Gold (\$/Ounce)	1227.9	0.0%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.5	95.2	106.7	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

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Bank Asia Securities Limited (BASL) is one of the leading full-service brokerage companies in Bangladesh. The company was formed in 2009 and running its operation as a majority owned subsidiary of Bank Asia Limited. BASL offers full-fledged standard brokerage services for retail, institutional and foreign clients with a dedicated team of skilled professionals. The company is currently providing the brokerage services under the membership of Dhaka Stock Exchange Limited (DSE).

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