

# BASL Daily Market Commentary

Tuesday, April 23, 2019

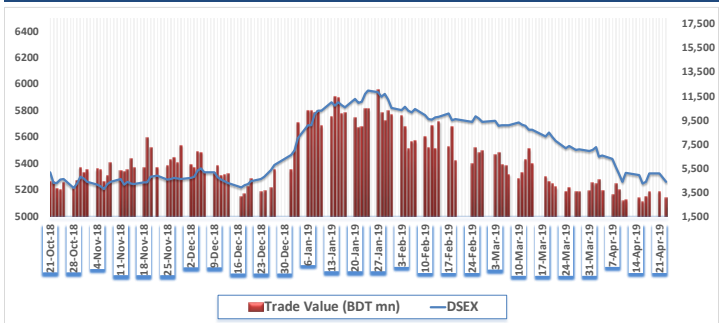
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
info@basl-bd.com, Tel- 9515826-2, www.basl-bd.com



## Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index decreased by 62.9 points or 1.2% and closed at 5260.9 points today. The blue-chip index DS30 and the shariah based index DSES both closed in red, closing to 1872.7 and 1215.4 respectively. Turnover stood at BDT million 2986 (USD 36.0 million), about 15.12% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Life Insurance Sector (+1.6%) was the highest gainer followed by Jute Sector (+1.1%) whereas Ceramics Sector (-3.4%) was the highest loser followed by IT (-2.9%) and Paper & Printings (-2.7%) respectively. FORTUNE (-1.3%) was the highest traded share with a turnover of BDT 345.4 million followed by UPGDCL (-3.8%) and MONNOCERA (-8.7%) respectively. Banks sector has highest turnover of 16.9% in the market. NATLIFEINS (+7.6%) was the today's top gainer while MONNOCERA (-8.7%) was the top loser today.

## Last Six Months Market Movement



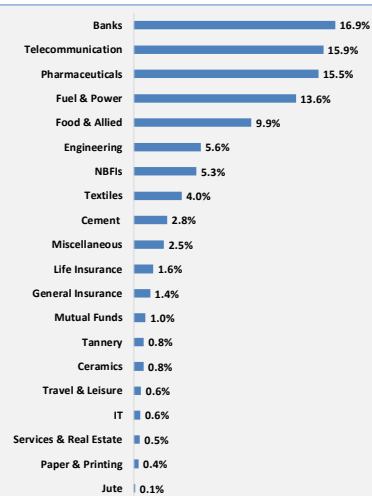
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5260.9	5323.7	-62.9	-1.2%	-15.8%
DSES	1215.4	1231.2	-15.8	-1.3%	-12.6%
DS30	1872.7	1892.9	-20.2	-1.1%	-18.0%
<b>Total Scripts</b>		<b>Advanced</b>	<b>Declined</b>	<b>Unchanged</b>	
330		34	267	41	
<b>Market Indicators</b>	<b>Today</b>	<b>Last day</b>	<b>Today</b>		
Market PE	13.24	13.41	Market RSI (14) 30.91 35.52		
<b>Market Statistics</b>		<b>Today</b>	<b>Last day</b>	<b>Change</b>	<b>Change (%)</b>
Market Cap	Mn BDT	3,918,590	3,963,828	(45,238)	-1.14%
	Mn USD	47,212	47,757	(545)	
Turnover	Mn BDT	2,986	3,518	(532)	-15.12%
	Mn USD	36.0	42.4	(6.4)	
Volume	Mn Shares	76.4	84.3	(7.9)	-9%

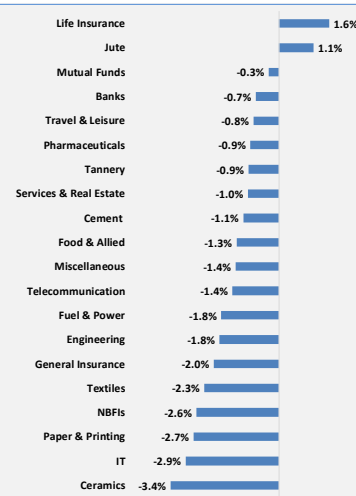
## Sector Review

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	278.3	9.6%	-7.6%	558,188	16.9%	-0.7%	8.5
Cement	7	30.2	1.0%	-5.4%	92,496	2.8%	-1.1%	32.4
Ceramics	5	186.0	6.4%	-27.9%	27,095	0.8%	-3.4%	16.8
Engineering	36	419.8	14.4%	-19.1%	185,550	5.6%	-1.8%	16.0
Food & Allied	17	128.0	4.4%	2.6%	326,148	9.9%	-1.3%	10.0
Fuel & Power	19	288.5	9.9%	-23.6%	449,455	13.6%	-1.8%	12.0
General Insurance	35	104.9	3.6%	-41.8%	45,670	1.4%	-2.0%	13.1
IT	8	83.2	2.9%	-42.9%	18,427	0.6%	-2.9%	18.1
Jute	3	7.4	0.3%	-45.6%	4,010	0.1%	1.1%	77.5
Life Insurance	12	25.1	0.9%	38.5%	54,424	1.6%	1.6%	n/m
Miscellaneous	13	164.6	5.7%	11.9%	83,649	2.5%	-1.4%	24.6
Mutual Funds	37	17.7	0.6%	117.3%	32,824	1.0%	-0.3%	12.4
NBFIs	23	65.9	2.3%	-14.6%	173,552	5.3%	-2.6%	20.0
Paper & Printing	3	21.7	0.7%	16.6%	13,355	0.4%	-2.7%	29.1
Pharmaceuticals	31	221.5	7.6%	-24.5%	511,960	15.5%	-0.9%	18.0
Services & Real Estate	4	20.4	0.7%	-7.2%	17,003	0.5%	-1.0%	15.5
Tannery	6	400.6	13.8%	21.7%	27,742	0.8%	-0.9%	16.7
Telecommunication	2	157.6	5.4%	-28.0%	525,499	15.9%	-1.4%	14.8
Textiles	53	267.3	9.2%	-20.3%	132,650	4.0%	-2.3%	16.6
Travel & Leisure	4	19.2	0.7%	18.3%	20,637	0.6%	-0.8%	28.0

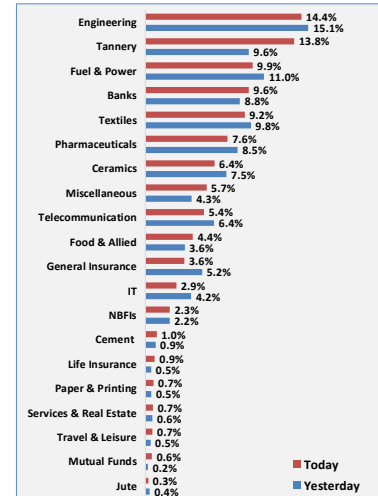
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



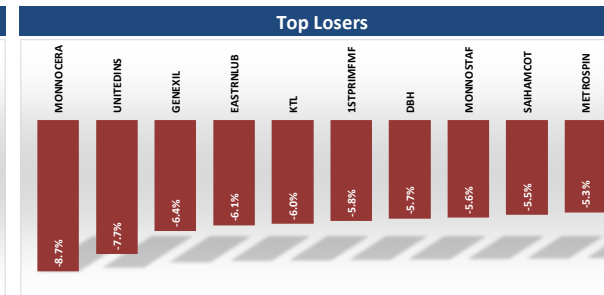
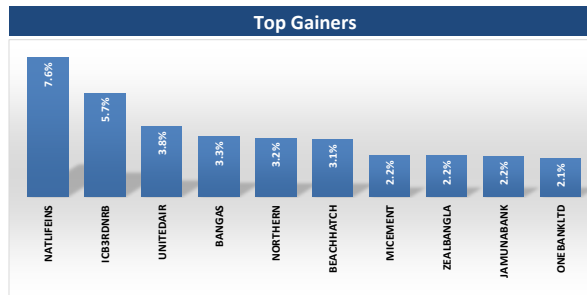
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
FORTUNE	37.3	-1.3%	345.4	11.9%
UPGDCL	322.5	-3.8%	111.3	3.8%
MONNOCERA	249	-8.7%	144.2	5.0%
BSCCL	161.9	-5.3%	137.7	4.7%
NLTUBES	121	-0.7%	77.6	2.7%
DAFODILCOM	54.4	1.9%	32.7	1.1%
ECABLES	321.3	-4.8%	39.0	1.3%
PREMIERBAN	13	0.0%	0.0	0.0%
MONNOSTAF	1278.6	-5.6%	68.7	2.4%
ESQUIRENT	42.1	-2.8%	51.4	1.8%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	369.4	-1.2%	498,801	15.1%
BATBC	1459.1	-1.2%	262,638	8.0%
SQURPHARMA	257.2	-1.2%	202,933	6.1%
UPGDCL	322.5	-3.8%	154,506	4.7%
RENATA	1177.4	0.6%	94,823	2.9%
ICB	109.2	-2.4%	76,186	2.3%
BRACBANK	62.8	0.0%	67,353	2.0%
LHBL	39.8	-1.5%	46,223	1.4%
OLYMPIC	215.4	-1.9%	43,067	1.3%
MARICO	1375.7	0.0%	43,335	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
FIRSTSBANK	10%S	22.04.2019	20.05.2019	
PREMIERBAN	15.5%S	23.04.2019	12.05.2019	
BDFINANCE	10%S	06.05.2019	06.05.2019	
CITYBANK	6%C, 5%S	12.05.2019	26.06.2019	

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

### KBPPWBIL: Sale & Buy Declarations of Sponsors Directors

Khan Brothers Shipbuilding Ltd. one of the Corporate Directors of the Company, has expressed its intention to sell its entire holding of 14,675,650 shares whereas Mr. Mohammed Enamul Kabir Khan, Mr. Md. Ruhul Kabir Khan and Mr. Tofayel Kabir Khan, all are Sponsors Directors of the Company, has expressed their intentions to buy 48,42,965 shares, 48,42,965 shares and 49,89,720 shares of the Company, (cont.)

### KBPPWBIL: Sale & Buy Declarations of Sponsors Directors

(Continuation news of KBPPWBIL): at prevailing market price (In the Block market) through Stock Exchange (DSE) within April 30, 2019, as per Regulation-4 of the BSEC (Substantial Acquisition of shares and Takeovers) Regulations, 2018. It is to be mentioned that after execution of this sale Khan Brothers Shipbuilding Ltd. will no longer serve as a Director of the Company. (end)

## Commodity Prices

Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	66.1	0.8%	42.4	76.9
Gold (\$/Ounce)	1276.1	-0.1%	1167.0	1350.0

## Exchange Rates

USD	EURO	GBP	RUPEE	CAD
82.9	95.0	109.6	1.2	60.0

\*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

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