

# BASL Daily Market Commentary

Wednesday, October 24, 2018

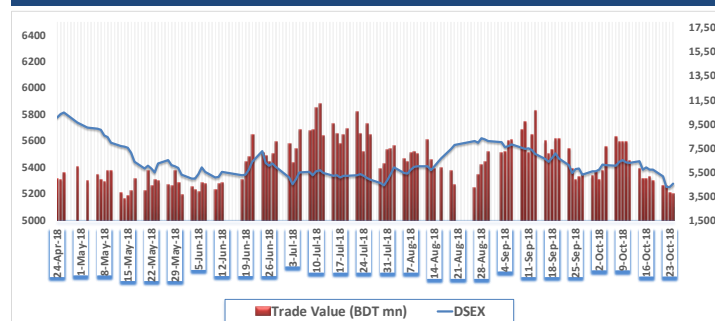
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
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## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 23.7 points or 0.5% and closed at 5276.3 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1872.0 and 1218.4 respectively. Turnover stood at BDT million 3680 (USD 44.3 million), about 3.00% lower than the previous trading session's value. Most of the sectors witnessed bullish performance today. Jute (+5.6%) was the highest gainer followed by Telecommunication (+2.4%) and NBFIs (+2.1%) whereas IT (-1.3%) was the highest loser, followed by General Insurance (-0.9%), Cement (-0.4%) and Ceramics (-0.4%). BEXIMCO (+3.7%) was the highest traded share with a turnover of BDT 213.0 million followed by KPCL (2.7%) and BBSCABLES (+7.6%) respectively. Banks sector has highest turnover of 17.3% in the market. SP CERAMICS (9.6%) was the today's top gainer while MEGHNAPET (-8.5%) was the top loser today.

## Last Six Months Market Movement



## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5276.3	5252.7	23.7	0.5%	-15.5%
DSES	1218.4	1212.0	6.4	0.5%	-12.4%
DS30	1872.0	1864.0	8.1	0.4%	-18.0%

Total Scripts	Advanced	Declined	Unchanged
330	155	145	41

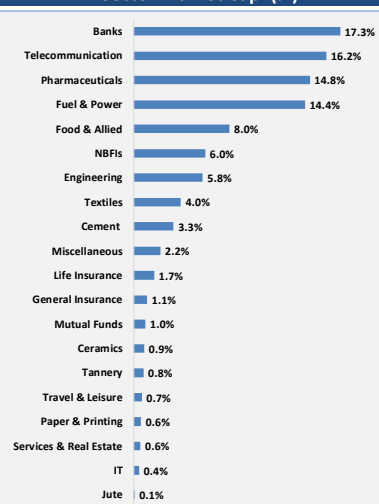
Market Indicators	Today	Last day	Today	Last day
Market PE	14.94	14.71	Market RSI (14)	33.24
				28.47

Market Statistics	Today	Last day	Change	Change (%)
Market Cap				
Mn BDT	3,831,769	3,831,769	-	0.00%
Mn USD	46,166	46,166	-	
Turnover				
Mn BDT	3,680	3,794	(114)	-3.00%
Mn USD	44.3	45.7	(1.4)	
Volume				
Mn Shares	98.3	102.8	(4.5)	-4%

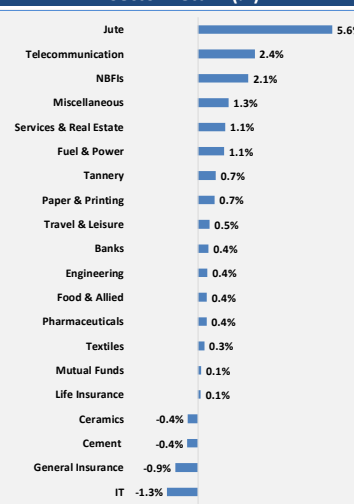
## Sector Review

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	453.1	12.5%	4.3%	561,130	17.3%	0.4%	9.5
Cement	7	40.7	1.1%	-54.9%	108,289	3.3%	-0.4%	35.4
Ceramics	5	111.3	3.1%	42.8%	28,409	0.9%	-0.4%	30.1
Engineering	35	420.4	11.6%	3.3%	187,646	5.8%	0.4%	15.3
Food & Allied	18	91.7	2.5%	-18.1%	260,254	8.0%	0.4%	23.7
Fuel & Power	18	477.0	13.2%	3.5%	465,888	14.4%	1.1%	15.0
General Insurance	35	40.9	1.1%	29.9%	36,604	1.1%	-0.9%	10.2
IT	8	97.6	2.7%	27.4%	14,325	0.4%	-1.3%	19.8
Jute	3	29.4	0.8%	-16.5%	2,369	0.1%	5.6%	478.2
Life Insurance	12	187.0	5.2%	-42.9%	55,426	1.7%	0.1%	n/m
Miscellaneous	12	281.3	7.8%	93.1%	72,724	2.2%	1.3%	19.7
Mutual Funds	36	17.1	0.5%	-18.3%	32,034	1.0%	0.1%	7.4
NBFIs	23	143.7	4.0%	-18.6%	193,969	6.0%	2.1%	16.5
Paper & Printing	2	51.0	1.4%	76.5%	19,614	0.6%	0.7%	24.4
Pharmaceuticals	28	403.7	11.1%	-7.7%	479,130	14.8%	0.4%	17.1
Services & Real Estate	4	13.7	0.4%	-22.7%	18,259	0.6%	1.1%	15.2
Tannery	6	67.4	1.9%	105.2%	26,585	0.8%	0.7%	16.0
Telecommunication	2	111.8	3.1%	12.1%	524,264	16.2%	2.4%	15.0
Textiles	48	536.9	14.8%	-6.9%	128,180	4.0%	0.3%	18.8
Travel & Leisure	4	47.1	1.3%	-23.8%	21,890	0.7%	0.5%	32.9

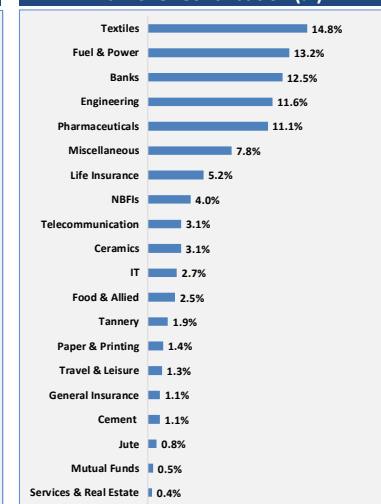
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



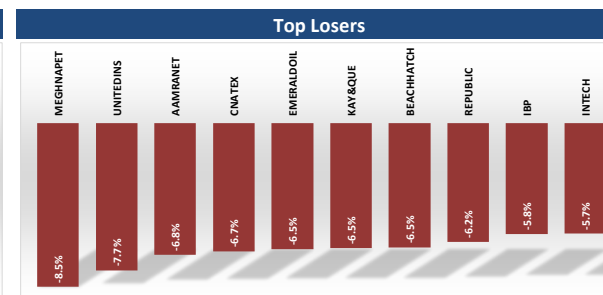
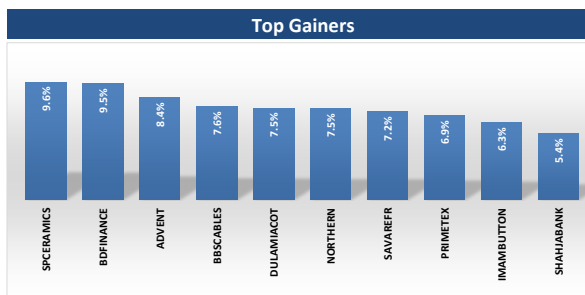
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
BEXIMCO	25.2	3.7%	213.0	5.9%
KPCL	115.8	2.7%	148.1	4.1%
BBS CABLES	114.2	7.6%	144.3	4.0%
SHAHJABANK	31.2	5.4%	141.1	3.9%
SUMITPOWER	44.2	1.8%	140.5	3.9%
DELTALIFE	116.9	-5.0%	121.0	3.3%
UPGDCL	324.3	2.0%	115.1	3.2%
GP	379	2.4%	110.6	3.1%
MONNOCERA	354.1	-0.7%	101.3	2.8%
DSSL	26.5	-4.0%	89.8	2.5%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	379	2.4%	511,764	15.8%
BATBC	3304.2	1.3%	198,252	6.1%
SQURPHARMA	263.7	0.6%	194,450	6.0%
UPGDCL	324.3	2.0%	155,368	4.8%
ICB	130	4.6%	86,379	2.7%
RENATA	1213.4	0.3%	84,976	2.6%
BRACBANK	67.8	0.1%	72,716	2.2%
LHBL	49.1	-1.0%	57,023	1.8%
SUMITPOWER	44.2	1.8%	47,200	1.5%
OLYMPIC	219.3	-3.1%	43,847	1.4%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
ACMELAB	35% C	31.10.2018	06.12.2018	
BDLAMP	20% C	24.10.2018	06.12.2018	
BSC	6% C	25.10.2018	24.11.2018	
FEKDIL	10% S	25.10.2018	22.11.2018	
GENNEXT	10% S	30.10.2018	22.11.2018	
STYLECRAFT	410% S	04.11.2018	17.12.2018	
NTC	22% C	12.11.2018	22.12.2018	
ENVOYTEX	10% C 2% S	14.11.2018	20.12.2018	
SUMITPOWER	30% C	11.11.2018	09.12.2018	

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

### AAMRANET: Dividend Declaration

The Board of Directors has recommended 10% cash dividend for the year ended on June 30, 2018. Date of AGM: 24.12.2018, Time: 11:10 AM, Venue: Delta Life Conference Hall, Delta Life Tower, House # 37, Road # 90, Gulshan-2, Dhaka-1212. Record Date: 12.11.2018. The Company has also reported EPS of Tk. 4.01, NAV per share of Tk. 32.33 and NOCFPS of Tk. 2.23 for the year ended on June 30, 2018 (cont.)

### QUASEMIND: Dividend Declaration

The Board of Directors has recommended 12% stock dividend for the year ended on June 30, 2018. Date of AGM: 29.11.2018, Time: 10:30 AM, Venue: Hall-2 Raowa Complex, Mohakhali, Dhaka. Record Date: 13.11.2018. The Company has also reported EPS of Tk. 1.51, NAV per share of Tk. 36.25 and NOCFPS of Tk. 0.64 for the year ended on June 30, 2018 as against Tk. 1.82, Tk. 34.79 and Tk. 2.40 respectively for the same period of the previous year.

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	66.2	-0.4%	53.8	76.9
Gold (\$/Ounce)	1234.1	-0.2%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
85.2	97.3	110.2	1.2	60.3

\*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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