

BASL Daily Market Commentary

Thursday, December 26, 2019

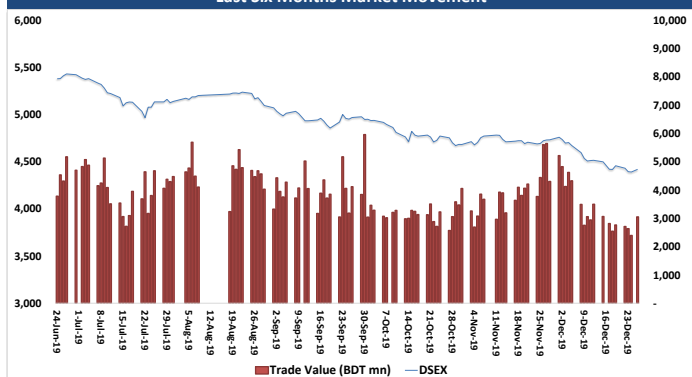
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Today's Market View

The DSE broad Index- DSEX closed in positive note today. The benchmark index advanced by 28.2 points or +0.6% and closed at 4418.8 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1509.0 and 994.9 respectively. Turnover stood at BDT million 3,051 (USD 36.0 million), about 27.40% higher than the previous trading session's value. Most of the sectors witnessed bullish performance today. Fuel & Power Sector (+2.0%) was the highest gainer followed by Ceramics (+2.0%) whereas Jute Sector (-3.8%) was the highest loser followed by Life Insurance Sector (-0.7%). DAFODILCOM (+4.0%) was the highest traded share with a turnover of BDT 102.4 million followed by NORTHERN (-5.9%) and UPGDCL (+6.1%) respectively. Textiles Sector lead highest turnover position of 13.1% in the whole market. ZAHEENSPIN (+10%) was the today's top gainer while ICIBANK (-6.7%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	4418.8	4390.7	28.2	0.6%	-29.2%
DSES	994.9	985.4	9.5	1.0%	-28.5%
DS30	1509.0	1496.4	12.6	0.8%	-33.9%

Total Scripts	Advanced	Declined	Unchanged	Not Traded
356	204	92	56	3

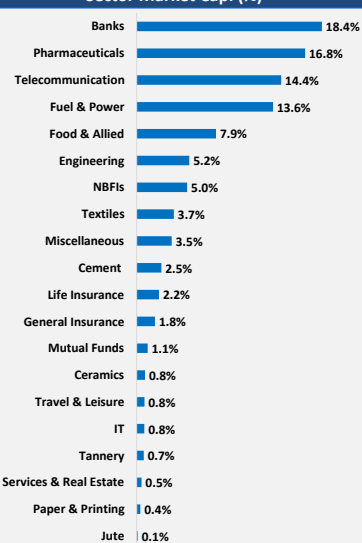
Market Indicators	Today	Last day	Today	Last day
Market PE	12.36	12.40	Market RSI (14)	28.92 22.95

Market Statistics	Today	Last day	Change	Change (%)
Market Cap	Mn BDT 3,384,934	3,365,755	19,179	0.57%
	Mn USD 39,926	39,700	226	
Turnover	Mn BDT 3,051	2,395	656	27.40%
	Mn USD 36.0	28.2	7.7	
Volume	Mn Shares 99.8	84.9	14.9	18%

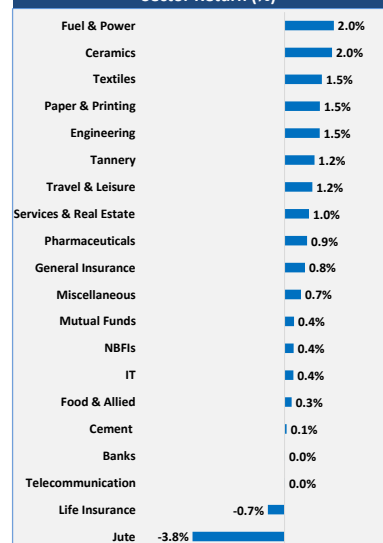
Sector Review

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	332.2	12.3%	98.2%	515,667	18.4%	0.0%	8.0
Cement	7	32.3	1.2%	9.6%	68,705	2.5%	0.1%	23.9
Ceramics	5	56.7	2.1%	-3.9%	23,193	0.8%	2.0%	25.0
Engineering	39	257.0	9.6%	-9.2%	146,326	5.2%	1.5%	14.9
Food & Allied	17	79.8	3.0%	-11.1%	220,837	7.9%	0.3%	18.6
Fuel & Power	19	204.8	7.6%	0.2%	379,454	13.6%	2.0%	9.8
General Insurance	35	252.9	9.4%	-4.7%	50,805	1.8%	0.8%	14.1
IT	9	213.2	7.9%	185.4%	21,142	0.8%	0.4%	19.6
Jute	3	92.3	3.4%	647.0%	2,686	0.1%	-3.8%	41.9
Life Insurance	12	148.0	5.5%	10.2%	61,911	2.2%	-0.7%	n/m
Miscellaneous	13	164.3	6.1%	31.1%	97,259	3.5%	0.7%	20.9
Mutual Funds	37	30.3	1.1%	-40.0%	30,614	1.1%	0.4%	40.8
NBFIs	23	94.1	3.5%	22.4%	140,388	5.0%	0.4%	22.0
Paper & Printing	3	15.6	0.6%	27.3%	10,138	0.4%	1.5%	21.5
Pharmaceuticals	32	248.4	9.2%	-23.3%	468,813	16.8%	0.9%	14.1
Services & Real Estate	4	4.6	0.2%	-52.6%	13,356	0.5%	1.0%	9.1
Tannery	6	42.0	1.6%	-5.2%	19,655	0.7%	1.2%	18.4
Telecommunication	2	57.4	2.1%	32.7%	402,292	14.4%	0.0%	11.7
Textiles	55	352.5	13.1%	30.6%	103,348	3.7%	1.5%	13.5
Travel & Leisure	5	12.0	0.4%	-20.3%	21,676	0.8%	1.2%	25.1

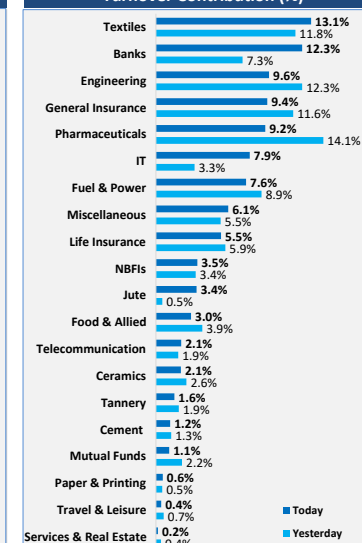
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



Most Active Stocks					Top Gainers				Top Losers			
Scrips	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)	Scrips	Price	Change (%)	Forward PE	Scrip	Price	Change (%)	Forward PE
DAFODILCOM	60.5	4.0%	102.4	3.8%	ZAHEENSPIN	9.9	10.0%	24.75	ICBIBANK	2.8	-6.7%	n/a
NORTHERN	773	-5.9%	88.2	3.3%	DSHGARME	112.9	9.9%	n/a	NORTHERN	773	-5.9%	26.99
UPGDCL	257.6	6.1%	79.4	3.0%	UNITEDINS	55.6	9.9%	33.9	SSSTEEL	22.3	-4.3%	7.06
NATLIFEINS	288.5	-0.7%	74.4	2.8%	MHSML	9	9.8%	n/a	PREMIERCEM	45.4	-4.0%	27.68
KPCL	44.8	-1.1%	64.4	2.4%	ANLIMAYARN	43	9.7%	119.44	POPULARLIF	87	-3.9%	0
SINOBANGLA	84.1	-2.4%	64.1	2.4%	PRIMETEX	22.2	9.4%	46.25	GHAIL	20	-3.8%	8.33
RINGSHINE	10.9	-2.7%	58.4	2.2%	PRAGATIINS	37.6	9.0%	12.1	BIFC	2.6	-3.7%	n/a
BANKASIA	18	-1.6%	58.0	2.2%	MATINSPINN	31.8	8.9%	44.17	WMSHIPYARD	10.7	-3.6%	5.05
PARAMOUNT	41.5	1.5%	56.9	2.1%	EMERALDOIL	13.6	8.8%	113.33	SAVAREFR	117.8	-3.3%	n/a
SQURPHARMA	188.3	1.3%	56.0	2.1%	MEGCONMILK	13.1	8.3%	n/a	TALLUSPIN	3	-3.2%	n/a

Market Leaders Composition					Upcoming Record Date & AGM date for Dividends/Right Offerings				Performances of World Stock Indices				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)	Scrip	Declaration	Record Date	AGM Date	Indices	Country	Index Value	Change	Change (%)
GP	286.9	-0.1%	387,401	13.8%	EASTRNLAB	100% cash	17.12.2019	08.02.2020	DJIA	USA	24,682	-45	-0.2%
BATBC	956.1	0.2%	172,098	6.2%	ECABLES	5% cash	12.12.2019	08.02.2020	FTSE 100	UK	7,039	-22	-0.3%
SQURPHARMA	188.3	1.3%	158,970	5.7%	POWERGRID	20% cash	22.12.2019	25.01.2020	SENSEX	India	33,133	-3	0.0%
UPGDCL	257.6	6.1%	135,754	4.9%	PROGRESLIF	12% Stock	08.01.2020	08.01.2020	Nikkei 225	Japan	21,592	211	1.0%
RENATA	1091.4	1.1%	96,686	3.5%	BATASHOE	125% C interim	09.01.2020	-	STI	Singapore	3,507	-4	-0.1%
BRACBANK	56.6	0.0%	69,809	2.5%					SSE Comp.	China	3,266	-15	-0.5%
BERGERPBL	1386.6	0.3%	64,308	2.3%					NASDAQ Co	USA	7,345	-19	-0.3%
ICB	76.7	0.0%	58,863	2.1%					NYSE Comp.	USA	12,684	20	0.2%
MARICO	1649.5	0.2%	51,959	1.9%									
LHBL	33.9	0.3%	39,371	1.4%									

Today's News Cut

DSENEWS: Go-live of CNI-DSE Select Index

As part of technical collaboration plan between DSE and Strategic Investors of DSE, one new Index namely, CNI-DSE Select Index ("CSET") will be launched by DSE, designed and developed by Shenzhen Securities Information Co., Ltd. and Dhaka Stock Exchange Limited. The Index will go-live on 26 December 2019 and Index Values will start displaying at homepage of DSE Website on 1 January 2020. The base date of the Index is 31 December 2015 with base value of 1,000 points.

CONFIDCEM: To install 5.6 MW Captive Power Plant at the factory premises

The Company has informed that the Board of Directors has decided to install 5.6 MW Captive Power Plant at a cost of Tk. 28.00 crore (approximate) at the factory premises of the company to ensure uninterrupted electricity supply of Unit-3 of the factory.

HEIDELBCEM: Seeking Court Approval for Amalgamation with Meghna Energy Ltd.

Refer to their earlier news disseminated by DSE on 18.07.2018 regarding Amalgamation with Meghna Energy Ltd.; the Company has further informed that they have jointly presented an application under Sections 228 and 229 of the Companies Act, 1994, being Company Matter No. 308 of 2019 seeking sanction of the Hon'ble High Court Division regarding merger of Meghna Energy Limited (Transferor Company) with HeidelbergCement Bangladesh Limited (Transferee Company) through the Scheme of Amalgamation.

Comodity Prices

Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	61.3	0.3%	42.5	66.6
Gold (\$/Ounce)	1508.2	0.2%	1267.0	1566.0

Exchange Rates

USD	EURO	GBP	RUPEE	CAD
84.8	94.0	110.1	1.2	58.7

*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 2 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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