

BASL Daily Market Commentary

Tuesday, August 27, 2019

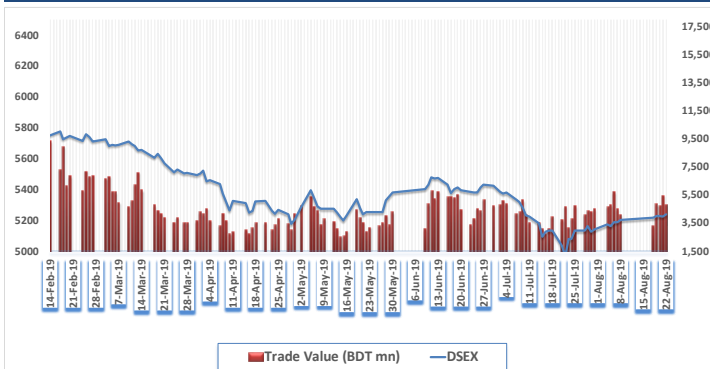
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000
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Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 12.9 points or 0.3% and closed at 5178.7 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1829.1 and 1198.3 respectively. Turnover stood at BDT million 4678 (USD 56.4 million), about 4.61% higher than the previous trading session's value. Jute sector (+3.1%) was the highest gainer followed by Telecommunication Sector (+2.0%) and Miscellaneous sector (+1.8%) respectively whereas Services & Real Estate Sector (-1.5%) was the highest loser followed by General insurance Sector (-1.1%) and Travel & Leisure Sector (-0.8%) respectively. SQRPHARMA (+0.9%) was the highest traded share with a turnover of BDT 141.8 million followed by SILCOPHL (-0.3%) and RUNNERAUTO (+3.3%) respectively. Banks sector has highest turnover of 17.0% in the market. SSSTEEL (+7.7%) was the today's top gainer while SEMLFBSLGF (-9.8%) was the top loser today.

Last Six Months Market Movement



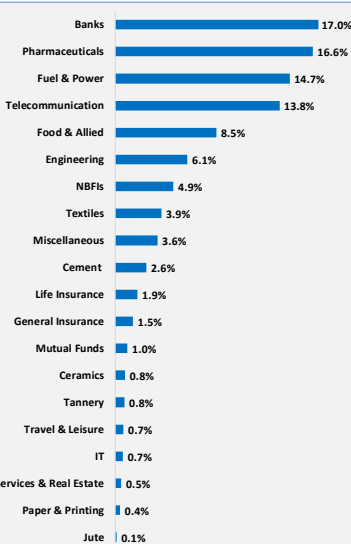
Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5178.7	5165.8	12.9	0.3%	-17.1%
DSES	1198.3	1193.1	5.3	0.4%	-13.8%
DS30	1829.1	1819.7	9.5	0.5%	-19.9%
Total Scripts					
	356	122	174	47	12
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	14.11	14.03	Market RSI (14)	49.70	56.54
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,849,181	3,831,127	18,055	0.47%
	Mn USD	46,376	46,158	218	
Turnover	Mn BDT	4,678	4,472	206	4.61%
	Mn USD	56.4	53.9	2.5	
Volume	Mn Shares	123.7	131.6	(7.8)	-6%

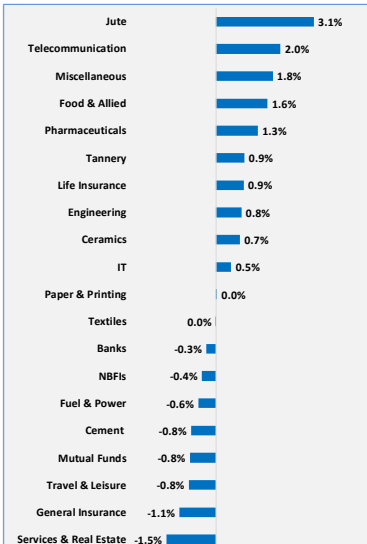
Sector Review

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	240.8	5.5%	21.8%	558,227	17.0%	-0.3%	7.9
Cement	7	28.6	0.7%	-0.5%	85,596	2.6%	-0.8%	28.8
Ceramics	5	154.1	3.5%	-5.5%	27,153	0.8%	0.7%	25.6
Engineering	39	772.6	17.7%	23.5%	198,782	6.1%	0.8%	16.6
Food & Allied	17	216.8	5.0%	76.1%	278,004	8.5%	1.6%	27.6
Fuel & Power	19	347.6	8.0%	-24.9%	480,330	14.7%	-0.6%	13.4
General Insurance	35	214.6	4.9%	-9.9%	49,194	1.5%	-1.1%	12.7
IT	9	149.9	3.4%	-28.0%	21,341	0.7%	0.5%	21.8
Jute	3	20.3	0.5%	27.9%	3,990	0.1%	3.1%	73.0
Life Insurance	12	79.9	1.8%	-25.3%	61,421	1.9%	0.9%	n/m
Miscellaneous	13	224.0	5.1%	-19.0%	116,421	3.6%	1.8%	24.6
Mutual Funds	37	78.8	1.8%	-3.7%	33,677	1.0%	-0.8%	15.7
NBFIs	23	70.3	1.6%	-25.7%	160,210	4.9%	-0.4%	18.9
Paper & Printing	3	17.3	0.4%	-29.9%	13,462	0.4%	0.0%	37.7
Pharmaceuticals	32	1087.7	24.9%	30.3%	543,728	16.6%	1.3%	18.0
Services & Real Estate	4	63.2	1.4%	35.1%	17,085	0.5%	-1.5%	16.6
Tannery	6	108.0	2.5%	20.2%	25,668	0.8%	0.9%	24.1
Telecommunication	2	64.7	1.5%	-29.8%	452,135	13.8%	2.0%	12.3
Textiles	55	394.5	9.0%	-18.2%	126,812	3.9%	0.0%	16.6
Travel & Leisure	5	31.1	0.7%	6.8%	22,960	0.7%	-0.8%	24.7

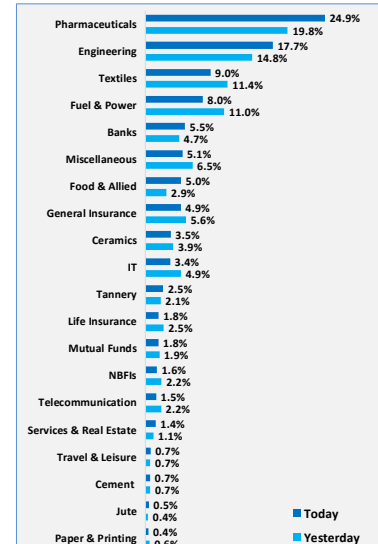
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



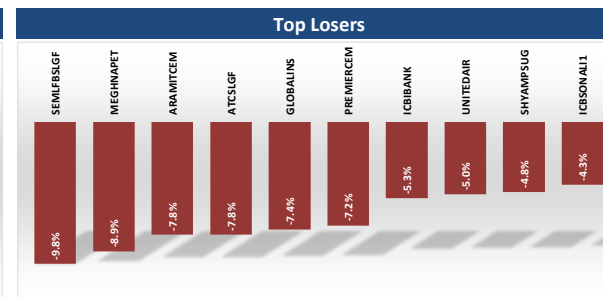
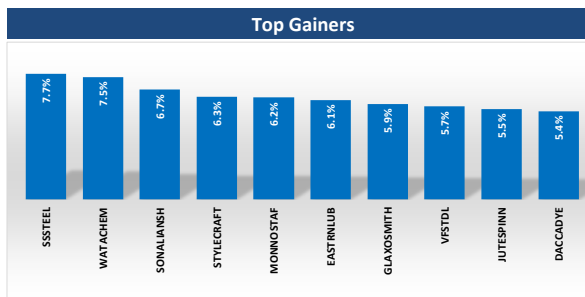
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
SQRPHARMA	253.6	0.9%	141.8	3.2%
SILCOPHL	34.1	-0.3%	136.7	3.1%
RUNNERAUTO	96.1	3.3%	107.6	2.5%
UPGDCL	388.2	-1.3%	107.5	2.5%
BSC	53.6	-2.4%	101.6	2.3%
BEACONPHAR	25.8	2.0%	99.4	2.3%
MONNOCERA	216.5	2.9%	97.7	2.2%
SSSTEEL	30.8	7.7%	94.3	2.2%
IBP	25	5.0%	88.5	2.0%
JMISMDL	502.6	2.1%	86.2	2.0%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	320.1	2.1%	432,231	13.2%
BATBC	1196	2.1%	215,280	6.6%
SQRPHARMA	253.6	0.9%	200,093	6.1%
UPGDCL	388.2	-1.3%	185,982	5.7%
RENATA	1187.9	0.0%	95,668	2.9%
BRACBANK	60.6	0.8%	74,743	2.3%
BERGERPBL	1555.3	2.5%	72,132	2.2%
ICB	103.3	-0.9%	72,070	2.2%
MARICO	1799.9	2.0%	56,697	1.7%
LHBL	39	-0.3%	45,294	1.4%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
ICBSONALI1	6%C	03.09.2019		
ICBAGRANI1	5%C	03.09.2019		
IFILISLMF1	6%C	03.09.2019		
ICB3RDNRB	4%C	03.09.2020		
PF1STMF	5%C	03.09.2021		
PRIME1ICBA	6%C	03.09.2022		
ICBEPMF1S1	4.5%C	03.09.2019		
ICBAMCL2ND	6%C	03.09.2020		
GRAMEENS2	9%C	03.09.2021		

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

MEGHNALIFE: Buy Declaration of a Director

Mrs. Dilruba Sharmin, one of the Directors of the Company, has expressed her intention to buy 80,500 shares of the Company at prevailing market price (In the Block Market) through Stock Exchange (DSE) within next 30 working days.

EXIMBANK: Sale Declaration of a Sponsor

Mr. Mazakat Harun, one of the Sponsors of the Company, has expressed his intention to sell 25,00,000 shares out of his total holding of 1,35,96,116 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	54.3	1.3%	42.4	76.9
Gold (\$/Ounce)	1539.6	0.2%	1184.0	1546.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
84.5	93.9	103.7	1.2	57.1

*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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