

# BASL Daily Market Commentary

Tuesday, January 29, 2019

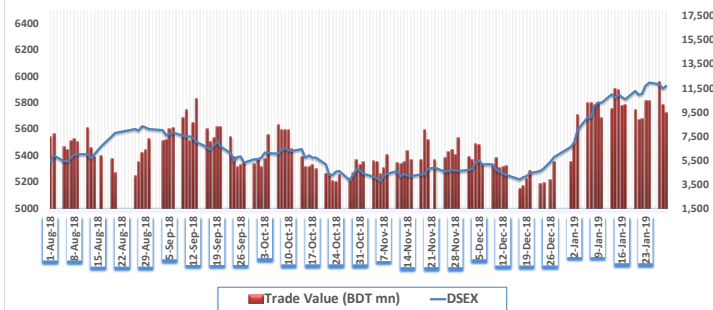
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
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## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 20.3 points or 0.3% and closed at 5924.5 points today. Today the blue-chip index DS30 closed in red and closed at 2046.3 and the shariah based index DSES closed in green and closed at 1331.6. Turnover stood at BDT 9459 million (USD 114.0 million), about 6.31% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Jute sector (+3.6%) was the highest gainer, followed by General Insurance (+2.3%) and Telecommunication (+1.4%) respectively, whereas Fuel & Power (-1.0%) was the highest loser, followed by Travel & Leisure (-1.0%) and Cement (-0.7%). GP (+1.4%) was the highest traded share with a turnover of BDT 255.3 million followed by SQUAREPHARMA (+0.3%) and BATBC (-0.5%) respectively. Banks sector has highest turnover of 17.9% in the market. NPOLYMAR (+9.9%) was the today's top gainer while ACI (-6.9%) was the top loser today.

## Last Six Months Market Movement



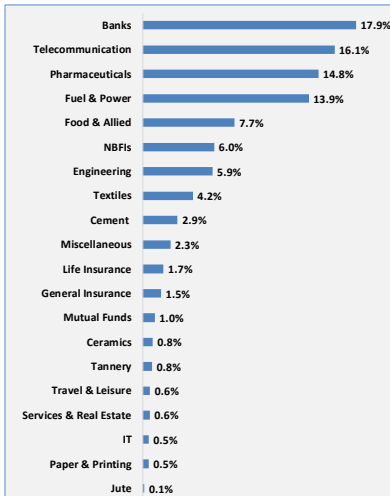
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5924.5	5904.2	20.3	0.3%	-5.1%
DSES	1331.6	1329.4	2.2	0.2%	-4.2%
DS30	2046.3	2046.8	-0.5	0.0%	-10.4%
<b>Total Scripts</b>	<b>Advanced</b>	<b>Declined</b>	<b>Unchanged</b>		
	330	151	159	37	
<b>Market Indicators</b>	<b>Today</b>	<b>Last day</b>	<b>Today</b>	<b>Last day</b>	
<b>Market PE</b>	16.28	16.14	<b>Market RSI (14)</b>	73.25	71.90
<b>Market Statistics</b>	<b>Today</b>	<b>Last day</b>	<b>Change</b>	<b>Change (%)</b>	
<b>Market Cap</b>	Mn BDT	4,215,818	4,206,917	8,901	0.21%
	Mn USD	50,793	50,686	107	
<b>Turnover</b>	Mn BDT	9,459	10,095	(637)	-6.31%
	Mn USD	114.0	121.6	(7.7)	
<b>Volume</b>	Mn Shares	254.5	276.4	(21.9)	-8%

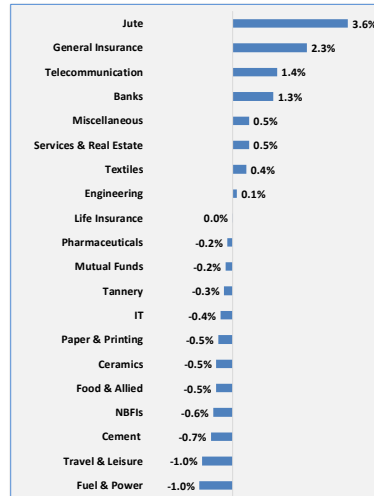
## Sector Review

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	1096.9	11.6%	-3.5%	647,523	17.9%	1.3%	11.5
Cement	7	71.9	0.8%	11.8%	105,690	2.9%	-0.7%	39.0
Ceramics	5	101.2	1.1%	103.4%	30,243	0.8%	-0.5%	22.4
Engineering	36	1221.4	13.0%	22.7%	211,501	5.9%	0.1%	17.8
Food & Allied	17	258.8	2.7%	-13.8%	278,433	7.7%	-0.5%	20.6
Fuel & Power	19	1069.8	11.3%	-14.6%	503,822	13.9%	-1.0%	13.2
General Insurance	35	1323.9	14.0%	-14.5%	55,819	1.5%	2.3%	16.7
IT	8	222.7	2.4%	-24.6%	18,167	0.5%	-0.4%	21.2
Jute	3	41.7	0.4%	0.1%	4,573	0.1%	3.6%	94.5
Life Insurance	12	214.2	2.3%	-9.9%	63,153	1.7%	0.0%	n/m
Miscellaneous	13	373.2	4.0%	4.3%	83,855	2.3%	0.5%	24.1
Mutual Funds	37	43.9	0.5%	-11.6%	36,376	1.0%	-0.2%	14.5
NBFIs	23	551.3	5.8%	-7.1%	216,472	6.0%	-0.6%	26.5
Paper & Printing	3	25.0	0.3%	48.7%	17,774	0.5%	-0.5%	24.6
Pharmaceuticals	31	775.2	8.2%	-18.4%	534,003	14.8%	-0.2%	18.1
Services & Real Estate	4	409.7	4.3%	91.5%	20,934	0.6%	0.5%	18.5
Tannery	6	184.8	2.0%	22.4%	28,083	0.8%	-0.3%	15.9
Telecommunication	2	318.7	3.4%	-39.7%	582,056	16.1%	1.4%	16.4
Textiles	53	1089.4	11.6%	-3.4%	152,015	4.2%	0.4%	17.9
Travel & Leisure	4	37.4	0.4%	-26.9%	21,913	0.6%	-1.0%	29.8

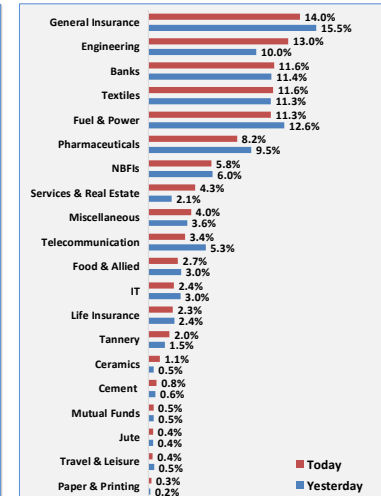
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



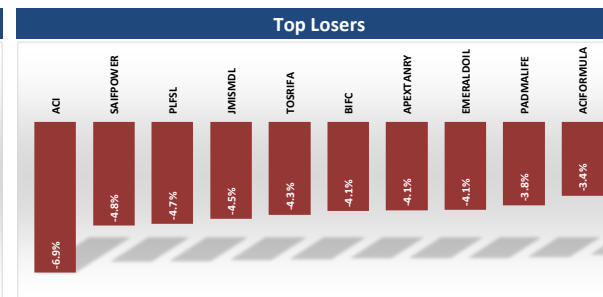
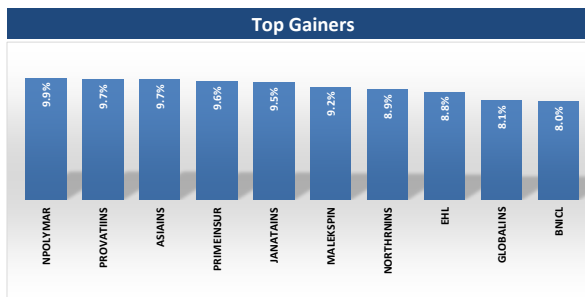
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
GP	415.4	1.4%	255.3	15.5%
SQURPHARMA	272.6	0.3%	153.7	6.0%
BATBC	3461.1	-0.5%	0.9	5.7%
UPGDCL	380.7	-2.2%	332.1	5.0%
RENATA	1141.4	0.1%	8.7	2.5%
ICB	128.3	-1.2%	8.4	2.5%
BRACBANK	82.1	0.6%	106.9	2.4%
LHBL	45	-1.1%	17.7	1.4%
OLYMPIC	237.4	-1.3%	43.4	1.3%
ISLAMIBANK	28	0.7%	11.6	1.2%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	415.4	1.4%	560,915	15.5%
SQURPHARMA	272.6	0.3%	215,084	6.0%
BATBC	3461.1	-0.5%	207,666	5.7%
UPGDCL	380.7	-2.2%	182,388	5.0%
RENATA	1141.4	0.1%	91,923	2.5%
ICB	128.3	-1.2%	89,512	2.5%
BRACBANK	82.1	0.6%	88,052	2.4%
LHBL	45	-1.1%	52,262	1.4%
OLYMPIC	237.4	-1.3%	47,465	1.3%
ISLAMIBANK	28	0.7%	45,080	1.2%

Upcoming Record Date & AGM date for Dividends/Right Offerings			
Scrip	Declaration	Record Date	AGM Date

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

### BSC: Procurement of new ship

Referring to their earlier news disseminated on 18.10.2016 regarding new vessels procurement, the Company has further informed that under the scope of the project for procurement of 6 new vessels (each having capacity of approximately 39,000 DWT), the ship namely " M.T. Banglar Agrojatra ", which was built in China has already been handed over by the New Yang G Shipyard Authority of China and the said ship has already been engaged in the commercial operation

### FUWANGFOOD: Procurement of auxiliary machineries & re-start commercial operation

The Company has informed that they have procured some auxiliary machineries and decided to re-start the commercial operation of Fu-Wang pure Drinking Water from first week of the February, 2019. The attainable production capacity would be 65,000 crates per month (1 crate=24 pcs of 500 ml bottle). They also informed that one L/C of Tk. 50,70,000.00 for auxiliary machineries has been opened to maintain the existing bread production capacity of the factory.

Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	52.1	0.3%	42.4	76.9
Gold (\$/Ounce)	1307.7	0.4%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.8	95.9	110.3	1.2	60.1

\*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

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