

# BASL Daily Market Commentary

Monday, July 29, 2019

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

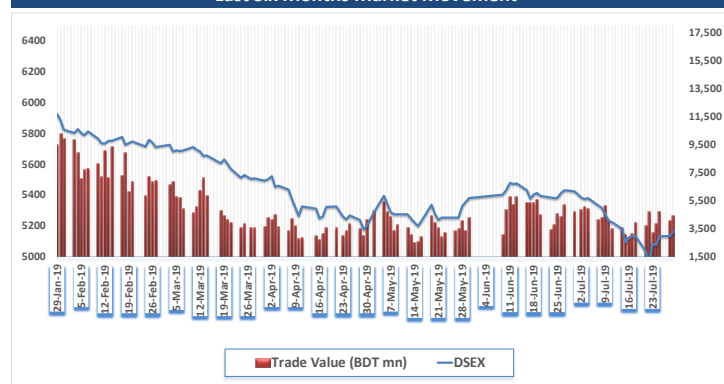


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## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 26.8 points or 0.5% and closed at 5160.7 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1844.3 and 1186.5 respectively. Turnover stood at BDT million 4378 (USD 52.7 million), about 7.83% higher than the previous trading session's value. Most of the sectors witnessed bullish performance today. Jute sector (+5.5%) was the highest gainer followed by Cement Sector (+3.4%) and IT sector (+3.1%) respectively whereas Mutual Fund Sector (-1.8%) was the highest loser followed by Fuel & Power sector (-0.7%) and Banks Sector (-0.7%) respectively. UPGDCL (-2.0%) was the highest traded share with a turnover of BDT 173.0 million followed by NATLIFEINS (+3.1%) and BSC (+0.2%) respectively. Banks sector has highest turnover of 17.2% in the market. DSHGARME (+10.0%) was the today's top gainer while VAMLRBBF (-9.3%) was the top loser today.

## Last Six Months Market Movement



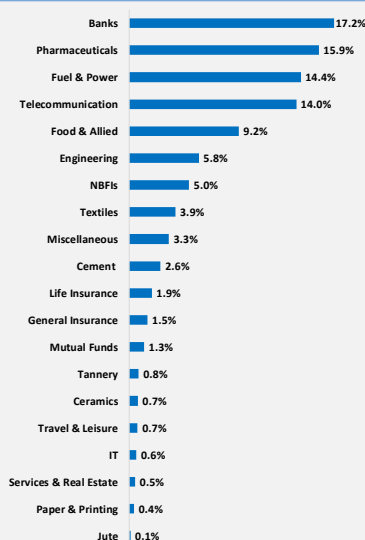
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5160.7	5133.9	26.8	0.5%	-17.4%
DSES	1186.5	1176.5	10.0	0.9%	-14.7%
DS30	1844.3	1839.5	4.8	0.3%	-19.2%
Total Scrips		Advanced	Declined	Unchang	Not Traded
		353	242	93	18
Market Indicators	Today	Last day	Today		Last day
Market PE	13.66	13.61	Market RSI (14)		45.48
					42.41
Market Statistics		Today	Last day	Change	Change (%)
Market Cap	Mn BDT	3,861,777	3,847,423	14,354	0.37%
	Mn USD	46,527	46,354	173	
Turnover	Mn BDT	4,378	4,060	318	7.83%
	Mn USD	52.7	48.9	3.8	
Volume	Mn Shares	144.6	154.7	(10.1)	-7%

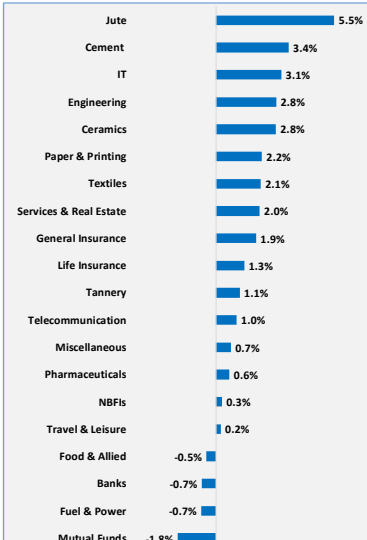
## Sector Review

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	203.9	4.7%	1.6%	565,499	17.2%	-0.7%	9.3
Cement	7	56.4	1.3%	98.5%	86,607	2.6%	3.4%	30.6
Ceramics	5	136.7	3.2%	20.0%	23,866	0.7%	2.8%	22.5
Engineering	38	476.2	11.0%	26.5%	192,070	5.8%	2.8%	16.2
Food & Allied	17	152.8	3.5%	46.9%	302,380	9.2%	-0.5%	11.1
Fuel & Power	19	383.0	8.9%	-4.1%	474,052	14.4%	-0.7%	13.0
General Insurance	35	480.7	11.1%	19.5%	50,563	1.5%	1.9%	13.2
IT	9	97.5	2.3%	31.7%	19,705	0.6%	3.1%	20.1
Jute	3	16.4	0.4%	145.5%	3,558	0.1%	5.5%	65.1
Life Insurance	12	78.1	1.8%	-37.7%	62,217	1.9%	1.3%	n/m
Miscellaneous	13	341.2	7.9%	3.5%	109,820	3.3%	0.7%	23.2
Mutual Funds	37	338.6	7.8%	-44.2%	41,327	1.3%	-1.8%	16.3
NBFIs	23	72.3	1.7%	-22.8%	165,204	5.0%	0.3%	18.0
Paper & Printing	3	13.2	0.3%	16.4%	13,391	0.4%	2.2%	37.5
Pharmaceuticals	32	642.4	14.8%	44.2%	523,934	15.9%	0.6%	17.3
Services & Real Estate	4	52.3	1.2%	226.6%	16,277	0.5%	2.0%	15.8
Tannery	6	257.0	5.9%	8.0%	25,893	0.8%	1.1%	33.5
Telecommunication	2	123.9	2.9%	52.8%	461,593	14.0%	1.0%	12.6
Textiles	55	370.4	8.6%	26.2%	127,474	3.9%	2.1%	16.7
Travel & Leisure	5	33.8	0.8%	-54.1%	23,366	0.7%	0.2%	25.2

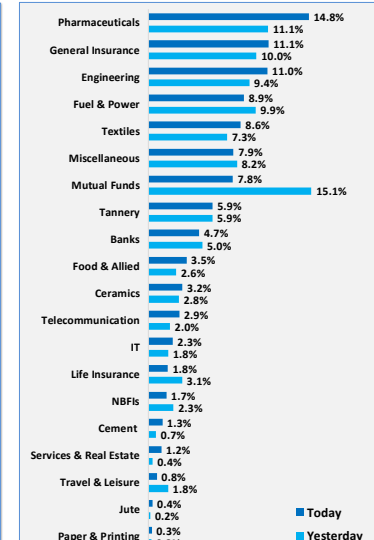
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



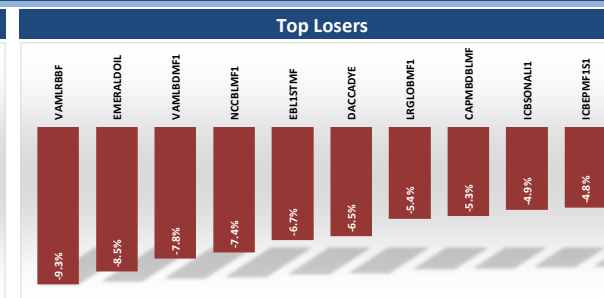
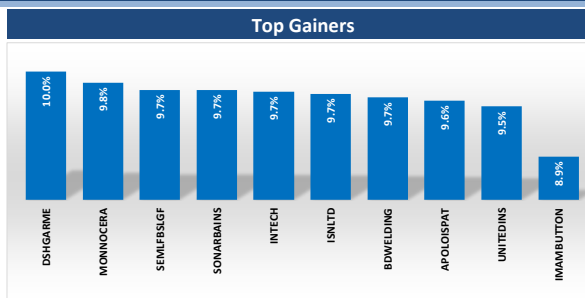
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
UPGDCL	390.8	-2.0%	173.0	4.0%
NATLIFEINS	259.4	3.1%	21.6	0.5%
BSC	56.9	0.2%	155.2	3.6%
FORTUNE	41.3	1.2%	193.8	4.5%
SQURPHARMA	251.4	-0.1%	130.3	3.0%
BEACONPHAR	23.1	4.1%	73.7	1.7%
SINGERBD	214.7	3.5%	86.9	2.0%
VFSTDL	48.1	-0.6%	12.6	0.3%
BRACBANK	62.8	-0.5%	15.9	0.4%
DOREENPWR	77.4	0.0%	36.1	0.8%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	327.3	0.8%	441,953	13.4%
BATBC	1319.2	-0.7%	237,456	7.2%
SQURPHARMA	251.4	-0.1%	198,357	6.0%
UPGDCL	390.8	-2.0%	187,227	5.7%
RENATA	1174.5	0.3%	94,589	2.9%
BRACBANK	62.8	-0.5%	77,456	2.4%
ICB	108.1	1.5%	75,419	2.3%
BERGERPBL	1438.3	0.5%	66,705	2.0%
MARICO	1707.8	0.0%	53,796	1.6%
OLYMPIC	227.2	-0.1%	45,426	1.4%

### 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

#### PRIMEINSUR: Sale Declaration of a Corporate Director

Fareast Islami Securities Limited, one of the Corporate Director of the Company, has expressed its intention to sell 8,25,000 shares out of its total holding of 25,95,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

### Comodity Prices

Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	56.3	0.1%	42.4	76.9
Gold (\$/Ounce)	1418.6	-0.1%	1167.0	1454.0

### Exchange Rates

USD	EURO	GBP	RUPEE	CAD
84.5	94.0	104.1	1.2	58.3

\*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

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Bank Asia Securities Limited (BASL) is one of the leading full-service brokerage companies in Bangladesh. The company was formed in 2009 and running its operation as a majority owned subsidiary of Bank Asia Limited. BASL offers full-fledged standard brokerage services for retail, institutional and foreign clients with a dedicated team of skilled professionals. The company is currently providing the brokerage services under the membership of Dhaka Stock Exchange Limited (DSE).

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