

BASL Daily Market Commentary

Sunday, September 29, 2019

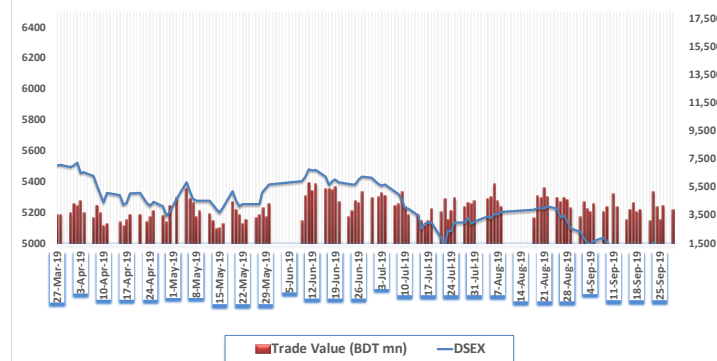
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000
info@basl-bd.com, Tel- 9515826-2, www.basl-bd.com



Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 7.3 points or 0.1% and closed at 4975.7 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1768.0 and 1149.9 respectively. Turnover stood at BDT million 3841 (USD 46.3 million), about 6.71% higher than the previous trading session's value. Most of the sectors witnessed bearish performance today. Ceramics Sector (+2.4%) was the highest gainer followed by Mutual Funds Sector (+1.9%) and Banks sector (+1.1%) respectively whereas Jute Sector (-3.0%) was the highest loser followed by General insurance Sector (-1.9%) and Paper & Printing Sector (-1.8%) respectively. BSCCL (+3.3%) was the highest traded share with a turnover of BDT 137.6 million followed by MONNOSTAF (+6.2%) and MONNOCERA (+6.8%) respectively. Banks sector has highest turnover of 17.3% in the market. GHAIL (+9.9%) was the today's top gainer while ICBAMCL2ND (-6.0%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	4975.7	4968.5	7.3	0.1%	-20.3%
DSES	1149.5	1148.5	1.0	0.1%	-17.3%
DS30	1768.0	1768.9	-1.0	-0.1%	-22.6%

Total Scripts	Advanced	Declined	Unchanged	Not Traded
356	125	192	36	2

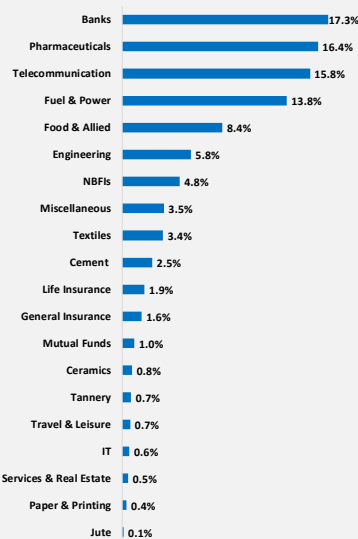
Market Indicators	Today	Last day	Today	Last day	
Market PE	13.66	13.69	Market RSI (14)	45.35	44.36

Market Statistics	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,759,891	3,765,322	(5,431)	-0.14%
	Mn USD	45,300	45,365	(65)	
Turnover	Mn BDT	3,841	4,117	(276)	-6.71%
	Mn USD	46.3	49.6	(3.3)	
Volume	Mn Shares	123.1	118.5	4.6	4%

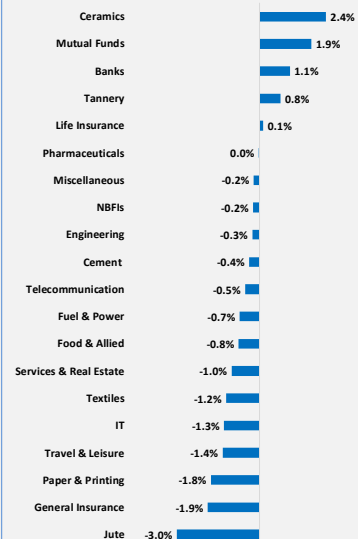
Sector Review

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	349.9	9.5%	17.4%	550,154	17.3%	1.1%	7.8
Cement	7	14.8	0.4%	-55.9%	79,940	2.5%	-0.4%	26.9
Ceramics	5	171.7	4.7%	15.5%	26,330	0.8%	2.4%	24.9
Engineering	39	610.7	16.7%	-15.6%	183,456	5.8%	-0.3%	14.9
Food & Allied	17	106.0	2.9%	-4.5%	267,475	8.4%	-0.8%	26.6
Fuel & Power	19	215.1	5.9%	13.8%	440,471	13.8%	-0.7%	12.0
General Insurance	35	624.1	17.0%	-15.4%	52,086	1.6%	-1.9%	13.4
IT	9	55.7	1.5%	12.5%	18,996	0.6%	-1.3%	19.4
Jute	3	26.5	0.7%	39.0%	3,506	0.1%	-3.0%	64.1
Life Insurance	12	59.5	1.6%	15.0%	59,730	1.9%	0.1%	n/m
Miscellaneous	13	162.8	4.4%	36.0%	111,359	3.5%	-0.2%	23.5
Mutual Funds	37	158.2	4.3%	41.5%	32,341	1.0%	1.9%	15.1
NBFIs	23	135.6	3.7%	41.4%	153,650	4.8%	-0.2%	18.2
Paper & Printing	3	10.9	0.3%	-12.4%	11,368	0.4%	-1.8%	31.9
Pharmaceuticals	32	333.2	9.1%	-23.9%	523,986	16.4%	0.0%	17.3
Services & Real Estate	4	14.3	0.4%	16.0%	15,438	0.5%	-1.0%	15.2
Tannery	6	152.8	4.2%	-6.1%	23,894	0.7%	0.8%	22.3
Telecommunication	2	168.7	4.6%	-28.5%	502,535	15.8%	-0.5%	13.7
Textiles	55	279.7	7.6%	4.6%	109,040	3.4%	-1.2%	14.5
Travel & Leisure	5	14.1	0.4%	-49.1%	21,359	0.7%	-1.4%	23.7

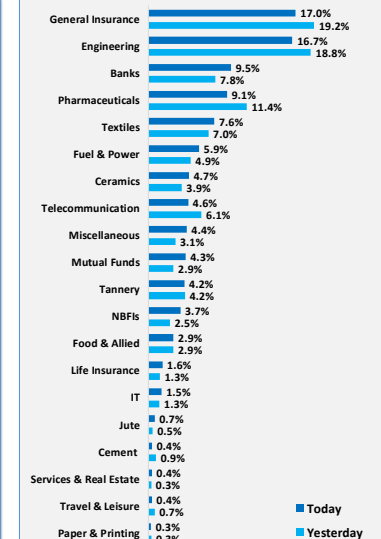
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



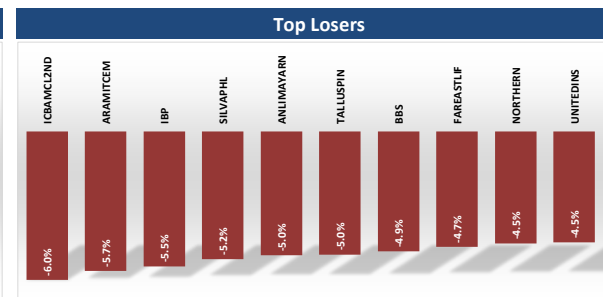
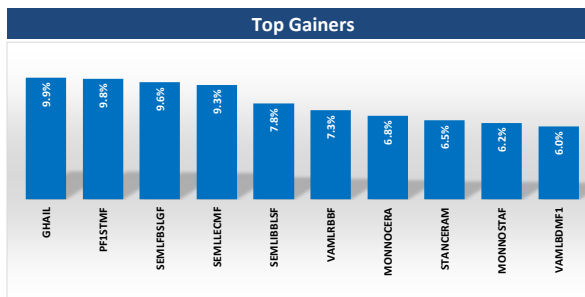
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
BSCCL	125	3.3%	137.6	3.8%
MONNOSTAF	1584.1	6.2%	129.8	3.5%
MONNOCERA	193.8	6.8%	117.5	3.2%
NLTUBES	156.8	-4.3%	112.3	3.1%
SONARBAINS	36.7	1.9%	85.0	2.3%
PREMIERBAN	11.4	2.7%	81.2	2.2%
STYLECRAFT	804.7	2.8%	74.7	2.0%
FORTUNE	30.2	4.1%	73.2	2.0%
LEGACYFOOT	131.7	2.2%	73.0	2.0%
NPOLYMAR	99.7	2.8%	72.2	2.0%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	356.9	-0.7%	481,922	15.1%
BATBC	1154.5	-1.3%	207,810	6.5%
SQURPHARMA	236.9	0.7%	186,916	5.9%
UPGDCL	303.9	-1.2%	160,154	5.0%
RENATA	1269.8	0.0%	102,264	3.2%
BRACBANK	61.7	1.3%	76,099	2.4%
BERGERPBL	1533.7	-0.2%	71,130	2.2%
ICB	98.4	-1.3%	68,651	2.2%
MARICO	1724	-0.8%	54,306	1.7%
SUMITPOWER	41.4	-0.5%	44,210	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

SHAHJABANK: Sale Declaration of a Director

Mrs. Tahera Faruque, one of the Directors of the Company, has expressed her intention to sell 10,00,000 shares out of her total holding of 3,08,56,325 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within October 31, 2019.

POPULARLIF: Credit Rating Result

National Credit Ratings Limited (NCR) has announced the Surveillance entity rating of the Company as "AA+" in the long term and "ST-1" in the short term based on audited financial statements of the Company of December 31, 2018.

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	56.2	0.5%	42.4	76.9
Gold (\$/Ounce)	1503.3	-0.2%	1186.0	1566.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
84.5	92.5	103.9	1.2	57.2

*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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