

# BASL Daily Market Commentary

Monday, October 29, 2018

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

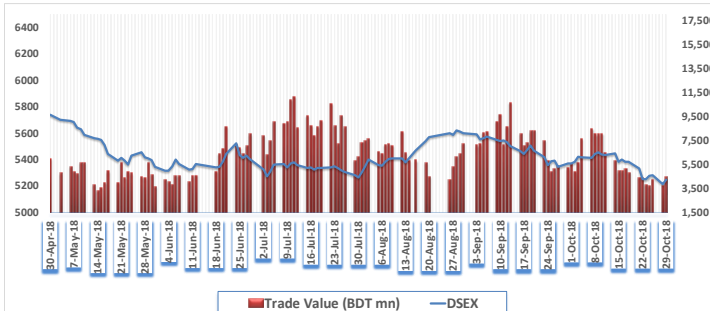


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## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 34.3 points or 0.7% and closed at 5246.5 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1860.3 and 1219.1 respectively. Turnover stood at BDT million 4428 (USD 53.4 million), about 19.12% higher than the previous trading session's value. Most of the sectors witnessed bullish performance today. IT (+4.6%) was the highest gainer followed by Miscellaneous (+2.9%) and Textiles (+2.2%) whereas Cement (-1.3%) was the highest loser, followed by Jute (-0.7%), Service & Real Estate (-0.4%) and General Insurance (-0.7%) respectively. KPCL (-2.4%) was the highest traded share with a turnover of BDT 123.3 million followed by MONNOCERA (-2.4%) and INTECH (+22.3%) respectively. Banks sector has highest turnover of 17.1% in the market. LIBRAINFU (+29.2%) was the today's top gainer while KPPL (-27.8%) was the top loser today.

## Last Six Months Market Movement



## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5246.5	5212.2	34.3	0.7%	-16.0%
DSES	1219.1	1210.4	8.7	0.7%	-12.3%
DS30	1860.3	1852.8	7.5	0.4%	-18.5%

Total Scripts	Advanced	Declined	Unchanged
330	199	110	30

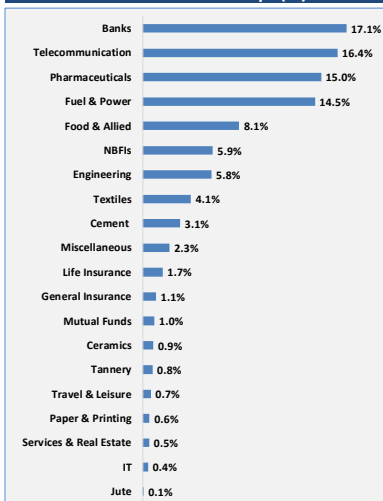
Market Indicators	Today	Last day	Today	Last day
Market PE	15.09	15.01	Market RSI (14)	34.43
				28.08

Market Statistics	Today	Last day	Change	Change (%)
Mn BDT	3,826,323	3,813,058	13,265	0.35%
Mn USD	46,100	45,940	160	
Turnover	Mn BDT 4,428	3,717	711	19.12%
	Mn USD 53.4	44.8	8.6	
Volume	Mn Shares 126.0	110.8	15.2	14%

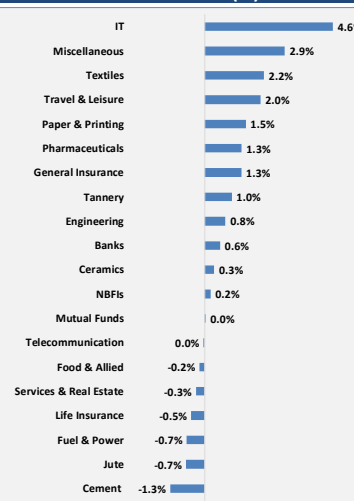
## Sector Review

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	504.8	11.9%	-6.4%	553,263	17.1%	0.6%	9.5
Cement	7	53.4	1.3%	-7.5%	101,618	3.1%	-1.3%	37.0
Ceramics	5	198.7	4.7%	4.0%	28,698	0.9%	0.3%	23.4
Engineering	35	431.4	10.2%	7.5%	186,674	5.8%	0.8%	15.2
Food & Allied	18	132.9	3.1%	103.0%	261,840	8.1%	-0.2%	23.8
Fuel & Power	18	479.2	11.3%	-3.8%	467,744	14.5%	-0.7%	15.2
General Insurance	35	31.1	0.7%	-31.9%	36,538	1.1%	1.3%	10.4
IT	8	187.5	4.4%	173.1%	14,404	0.4%	4.6%	20.6
Jute	3	13.5	0.3%	-4.0%	2,346	0.1%	-0.7%	105.0
Life Insurance	12	63.5	1.5%	-52.1%	54,427	1.7%	-0.5%	n/m
Miscellaneous	12	200.5	4.7%	40.2%	73,154	2.3%	2.9%	20.0
Mutual Funds	36	10.5	0.2%	-42.9%	31,978	1.0%	0.0%	7.3
NBFIs	23	193.5	4.6%	10.2%	190,199	5.9%	0.2%	16.7
Paper & Printing	2	61.7	1.5%	65.4%	18,646	0.6%	1.5%	23.2
Pharmaceuticals	28	529.6	12.5%	21.0%	484,286	15.0%	1.3%	18.2
Services & Real Estate	4	15.5	0.4%	-42.6%	17,258	0.5%	-0.3%	14.4
Tannery	6	55.9	1.3%	2.5%	26,525	0.8%	1.0%	17.5
Telecommunication	2	90.0	2.1%	13.6%	528,911	16.4%	0.0%	15.2
Textiles	48	856.2	20.2%	42.7%	130,924	4.1%	2.2%	19.3
Travel & Leisure	4	130.1	3.1%	252.1%	22,056	0.7%	2.0%	28.1

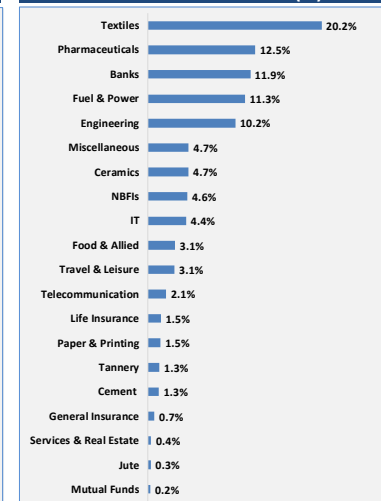
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



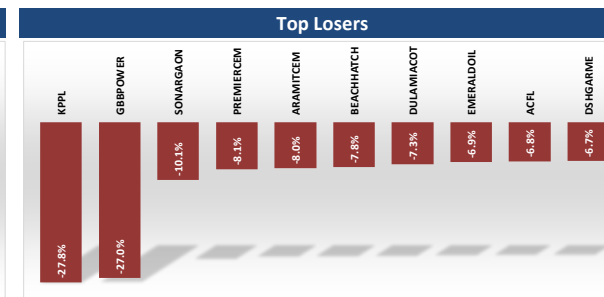
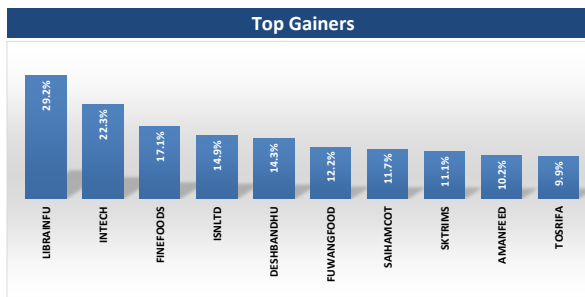
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
KPCL	123.3	-2.4%	203.7	4.8%
MONNOCERA	371.5	-2.4%	192.3	4.5%
INTECH	47.7	22.3%	134.3	3.2%
PENINSULA	30.4	8.6%	117.2	2.8%
SAIHAMTEX	39.6	2.3%	101.2	2.4%
AIL	80.7	9.8%	99.6	2.3%
NURANI	21.8	5.3%	97.1	2.3%
BSCABLES	117.8	2.3%	95.7	2.3%
GP	382.1	-0.1%	87.5	2.1%
SUMITPOWER	42.3	-1.6%	85.7	2.0%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	382.1	-0.1%	515,950	16.0%
BATBC	3330.6	-0.2%	199,836	6.2%
SQURPHARMA	265.8	1.7%	195,999	6.1%
UPGDCL	323.5	-1.2%	154,985	4.8%
RENATA	1226.6	0.0%	85,900	2.7%
ICB	126.1	-0.8%	83,788	2.6%
BRACBANK	69.5	1.2%	74,539	2.3%
LHBL	43.9	-2.4%	50,984	1.6%
SUMITPOWER	42.3	-1.6%	45,171	1.4%
KPCL	123.3	-2.4%	44,546	1.4%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
ACMELAB	35% C	31.10.2018	06.12.2018	
BDLAMP	20% C	24.10.2018	06.12.2018	
GENNEXT	10% S	30.10.2018	22.11.2018	
STYLECRAFT	410% S	04.11.2018	17.12.2018	
NTC	22% C	12.11.2018	22.12.2018	
ENVOYTEX	10% C 2% S	14.11.2018	20.12.2018	
SUMITPOWER	30% C	11.11.2018	09.12.2018	
MJLBD	45% C 5% S	04.11.2018	22.11.2018	
RAHIMTEXT	20% C 10% S	12.11.2018	27.12.2018	
ADVENT	2% C 10% S	11.11.2018	5.12.2018	

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

### ANWARGALV: Dividend Declaration

The Board of Directors has recommended 10% cash dividend for the year ended on June 30, 2018. Date of AGM: 23.01.2019, Time: 10:30 AM, Venue: BCIC Auditorium, 30-31, Dilkusha C/A, Dhaka-1000. Record Date: 29.11.2018. The Company has also reported EPS of Tk. 1.24, NAV per share of Tk. 9.34 and NOCFPS of Tk. 2.56 for the year ended on June 30, 2018 as against Tk. 1.14, Tk. 8.92 and Tk. 2.47 respectively for the same period of the previous year.

### ACFL: Dividend Declaration

The Board of Directors has recommended 10% cash dividend for the year ended on June 30, 2018. Date of AGM: 26.12.2018, Time: 11:00 AM, Venue: Factory Premises, Boiragichala, Sreepur, Gazipur. Record Date: 20.11.2018. The Company has also reported EPS of Tk. 3.22, NAV per share of Tk. 42.33 and NOCFPS of Tk. 1.80 for the year ended on June 30, 2018 as against Tk. 3.46, Tk. 39.12 and Tk. 4.00 respectively for the same period of the previous year.

## Commodity Prices

Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	67.2	-0.5%	53.8	76.9
Gold (\$/Ounce)	1231.4	-0.4%	1167.0	1369.0

## Exchange Rates

USD	EURO	GBP	RUPEE	CAD
84.9	96.6	108.8	1.2	60.2

\*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

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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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