

BASL Daily Market Commentary

Wednesday, July 31, 2019

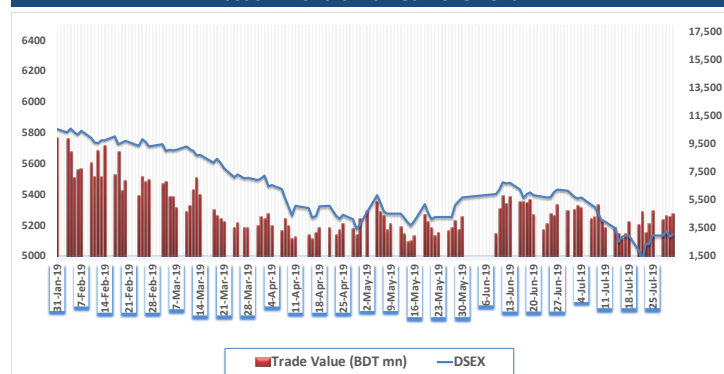
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000
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Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 13.8 points or 0.3% and closed at 5138.8 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1827.9 and 1181.2 respectively. Turnover stood at BDT million 4476 (USD 53.9 million), about 4.17% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Life Insurance sector (+3.2%) was the highest gainer followed by Jute Sector (+3.1%) and Ceramics sector (+2.6%) respectively whereas Mutual Fund Sector (-5.7%) was the highest loser followed by General Insurance sector (-2.0%) and Food & Allied Sector (-1.4%) respectively. MONNOCERA (+9.9%) was the highest traded share with a turnover of BDT 161.4 million followed by FORTUNE (-0.7%) and UPGDCL (-0.1%) respectively. Banks sector has highest turnover of 17.5% in the market. MONNOCERA (+9.9%) was the today's top gainer while SUNLIFEINS (-26.8%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5138.8	5125.0	13.8	0.3%	-17.7%
DSES	1181.2	1177.2	4.0	0.3%	-15.1%
DS30	1827.9	1826.9	1.0	0.1%	-19.9%

Total Scripts	Advanced	Declined	Unchange	Not Traded
353	120	197	36	2

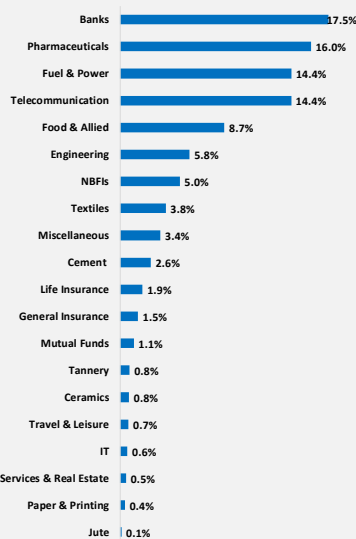
Market Indicators	Today	Last day	Today	Last day	
Market PE	14.00	13.17	Market RSI (14)	43.90	42.23

Market Statistics	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,834,777	3,824,353	10,424	0.27%
	Mn USD	46,202	46,077	126	
Turnover	Mn BDT	4,476	4,297	179	4.17%
	Mn USD	53.9	51.8	2.2	
Volume	Mn Shares	139.4	139.5	(0.1)	0%

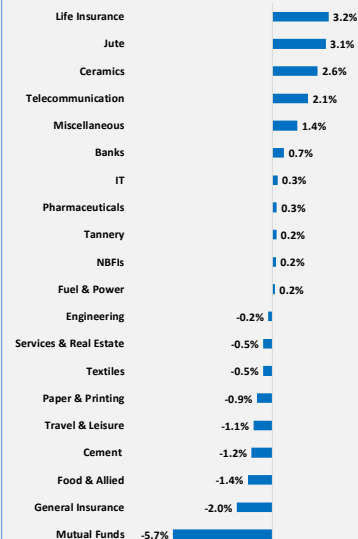
Sector Review

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	380.5	8.9%	51.8%	569,853	17.5%	0.7%	8.1
Cement	7	50.7	1.2%	73.3%	84,365	2.6%	-1.2%	28.4
Ceramics	5	197.3	4.6%	14.7%	24,602	0.8%	2.6%	23.2
Engineering	38	464.1	10.8%	20.1%	189,806	5.8%	-0.2%	16.0
Food & Allied	17	165.5	3.9%	-2.4%	285,257	8.7%	-1.4%	28.4
Fuel & Power	19	299.7	7.0%	-29.7%	468,948	14.4%	0.2%	12.9
General Insurance	35	321.9	7.5%	-13.8%	49,058	1.5%	-2.0%	12.7
IT	9	158.2	3.7%	-18.1%	20,027	0.6%	0.3%	20.5
Jute	3	21.8	0.5%	-10.3%	3,667	0.1%	3.1%	67.1
Life Insurance	12	121.3	2.8%	118.0%	61,523	1.9%	3.2%	n/m
Miscellaneous	13	386.2	9.0%	33.5%	110,076	3.4%	1.4%	23.2
Mutual Funds	37	284.1	6.6%	-12.8%	37,161	1.1%	-5.7%	17.4
NBFIs	23	70.8	1.6%	-8.1%	162,997	5.0%	0.2%	19.3
Paper & Printing	3	10.0	0.2%	-35.6%	13,199	0.4%	-0.9%	37.0
Pharmaceuticals	32	642.2	15.0%	14.6%	522,793	16.0%	0.3%	17.3
Services & Real Estate	4	24.3	0.6%	-48.6%	16,086	0.5%	-0.5%	15.7
Tannery	6	233.7	5.4%	-18.6%	25,905	0.8%	0.2%	24.4
Telecommunication	2	94.7	2.2%	4.8%	468,431	14.4%	2.1%	12.8
Textiles	55	324.5	7.6%	-15.8%	124,981	3.8%	-0.5%	16.4
Travel & Leisure	5	39.7	0.9%	-17.3%	22,902	0.7%	-1.1%	24.7

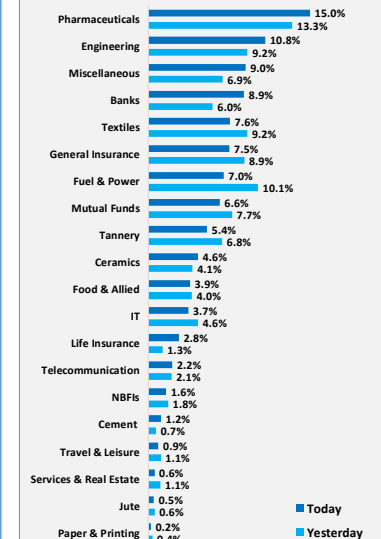
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



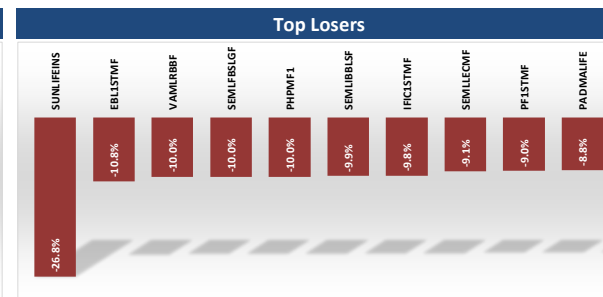
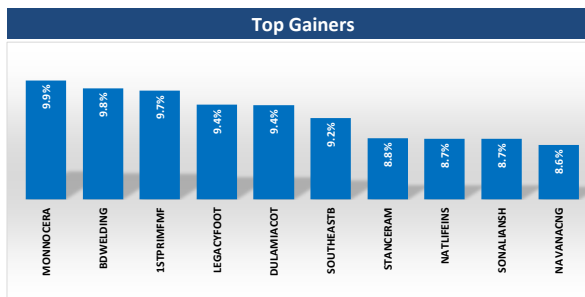
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
MONNOCERA	194.8	9.9%	161.4	3.8%
FORTUNE	41.3	-0.7%	158.1	3.7%
UPGDCL	380.7	-0.1%	145.6	3.4%
BSC	58.7	3.9%	133.2	3.1%
SINOBANGLA	77.1	-2.0%	110.0	2.6%
SQURPHARMA	250.9	-0.2%	89.6	2.1%
WATACHEM	477.9	4.8%	87.6	2.0%
BEACONPHAR	23.5	1.7%	87.5	2.0%
SHURWID	33.4	2.5%	86.9	2.0%
SKTRIMS	47.6	4.4%	80.4	1.9%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	332.4	2.1%	448,840	13.8%
BATBC	1230.5	-1.6%	221,490	6.8%
SQURPHARMA	250.9	-0.2%	197,962	6.1%
UPGDCL	380.7	-0.1%	182,388	5.6%
RENATA	1170.5	-0.3%	94,267	2.9%
BRACBANK	62.9	0.5%	77,579	2.4%
ICB	106.2	0.0%	74,093	2.3%
BERGERPBL	1451.5	1.6%	67,317	2.1%
MARICO	1697.4	0.9%	53,468	1.6%
LHBL	39.9	0.0%	46,339	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

GREENDELMF: Dividend Declaration

The Trustee Committee of the fund has declared 8.00% cash dividend for the year ended on June 30, 2019. Record date: 28.08.2019. The Fund has reported EPU of Tk. 0.76, NAV per unit at market price of Tk. 11.22, NAV per unit at cost of Tk. 10.86 and NOCFPU of Tk. 0.14 for the year ended on June 30, 2019 as against Tk. 0.95, Tk. 12.00, Tk. 11.01 and Tk. 1.78 respectively for the same period of the previous year.

DBH1STMF: Dividend Declaration

The Trustee Committee of the fund has declared 8.00% cash dividend for the year ended on June 30, 2019. Record date: 28.08.2019. The Fund has reported EPU of Tk. 0.86, NAV per unit at market price of Tk. 11.27, NAV per unit at cost of Tk. 10.96 and NOCFPU of Tk. (0.07) for the year ended on June 30, 2019 as against Tk. 0.97, Tk. 11.96, Tk. 11.00 and Tk. 2.50 respectively for the same period of the previous year.

Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	58.4	0.6%	42.4	76.9
Gold (\$/Ounce)	1431.9	0.2%	1167.0	1454.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
84.5	94.1	102.8	1.2	58.2

*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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