

BASL Daily Market Commentary

Monday, November 4, 2019

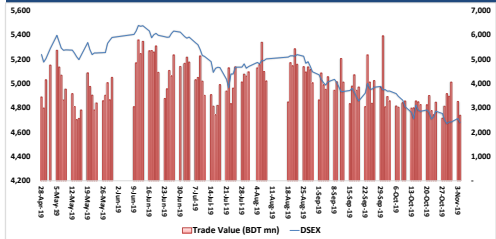
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Today's Market View

The DSE broad index- DSEX closed in green today. The benchmark index declined by 33.7 points or -0.7% and closed at 4678.4 points today. The blue-chip index D530 and the shariah based index DSE5 both closed in red, closing to 1626.6 and 1074.6 respectively. Turnover stood at BDT million 2690 (USD 31.7 million), about 17.47% lower than the previous trading session's value. Most of the sectors witnessed bearish performance today. Jute Sector (+4.4%) was the highest gainer followed by General Insurance Sector (+1.4%) whereas Paper Printing Sector (-3.2%) was the highest loser followed by Engineering Sector (-1.2%). NTLTUBES (-2.7%) was the highest traded share with a turnover of BDT 128.7 million followed by BRACBANK (-0.4%) and NORTHERN (7.5%) respectively. Engineering sector has highest turnover of 15.6% in the market. SAMATALETH (+9.9%) was the today's top gainer while WMSHIPYARD (-12.0%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	4678.4	4712.1	-33.7	-0.7%	-25.1%
DSE5	1074.6	1083.2	-8.6	-0.8%	-22.7%
D530	1626.6	1638.4	-11.7	-0.7%	-28.8%

	Total Scripts	Advanced	Declined	Unchanged	Not Traded
	356	78	242	34	1

Market Indicators	Today	Last day	Today	Last day
Market PE	13.23	13.45	Market RSI (14)	35.50
				38.40

Market Statistics	Today	Last day	Change	Change (%)
Mn BDT	3,590,337	3,608,744	(18,407)	-0.51%

Market Cap	Mn USD	Today	Last day	Change	Change (%)
Mn USD	42,364	42,581	(217)	-0.51%	

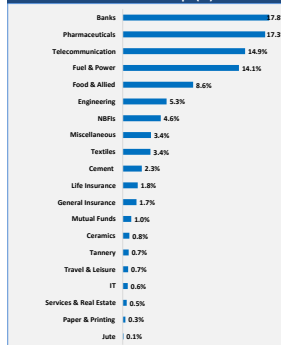
Turnover	Mn BDT	Today	Last day	Change	Change (%)
Mn BDT	2,690	3,260	(569)	-17.47%	
Mn USD	31.7	38.5	(6.7)		

Volume	Mn Shares	Today	Last day	Change	Change (%)
Mn Shares	94.5	116.9	(22.4)	-19%	

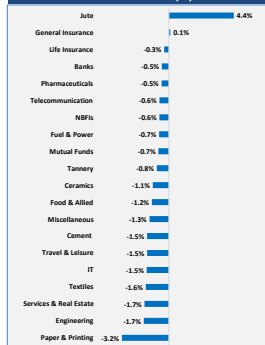
Sector Review

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	379.6	14.4%	49.8%	528,815	17.8%	-0.5%	8.0
Cement	7	21.8	0.8%	-12.1%	68,832	2.3%	-1.5%	23.9
Ceramics	5	94.5	3.6%	21.0%	23,992	0.8%	-1.1%	27.4
Engineering	39	410.3	15.6%	-34.7%	158,503	5.3%	-1.7%	13.5
Food & Allied	17	84.3	3.2%	-20.7%	254,446	8.6%	-1.2%	22.9
Fuel & Power	19	263.9	10.0%	34.5%	419,895	14.1%	-0.7%	11.1
General Insurance	35	197.0	7.5%	-23.7%	49,778	1.7%	0.1%	13.5
IT	9	18.1	0.7%	-59.6%	18,137	0.6%	-1.5%	19.5
Jute	3	103.5	3.9%	-28.9%	2,849	0.1%	4.4%	54.1
Life Insurance	12	17.3	0.7%	-45.9%	54,219	1.8%	-0.3%	n/m
Miscellaneous	13	94.0	3.6%	-26.0%	102,038	3.4%	-1.3%	19.8
Mutual Funds	37	74.6	2.8%	-11.7%	30,767	1.0%	-0.7%	35.3
NBFIs	23	46.2	1.8%	-41.2%	137,311	4.6%	-0.6%	17.6
Paper & Printing	3	8.1	0.3%	-44.4%	9,680	0.3%	-3.2%	27.1
Pharmaceuticals	32	299.6	11.4%	-29.3%	514,599	17.3%	-0.5%	16.9
Services & Real Estate	4	12.8	0.5%	-34.2%	14,274	0.5%	-1.7%	13.8
Tannery	6	105.3	4.0%	-11.9%	21,386	0.7%	-0.8%	22.1
Telecommunication	2	49.1	1.9%	-2.7%	442,182	14.9%	-0.6%	12.9
Textiles	55	333.0	12.6%	-31.5%	100,068	3.4%	-1.6%	15.8
Travel & Leisure	5	22.3	0.8%	-19.3%	19,666	0.7%	-1.5%	25.6

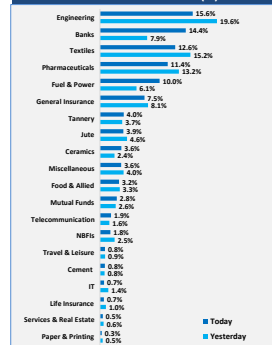
Sector Market Cap. (%)



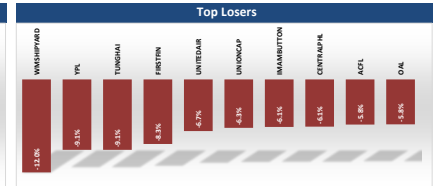
Sector Return (%)



Turnover Contribution (%)



Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mm)	Turnover As (%)
NITLUBES	153.9	-2.7%	128.7	4.9%
BRACBANK	52	-0.4%	109.6	4.2%
NORTHERN	760.8	7.5%	96.7	3.7%
STANCERAM	507.2	-4.3%	67.6	2.6%
VFSTDL	25.7	0.4%	64.9	2.5%
STYLECRAFT	667.7	-2.5%	53.1	2.0%
FORTUNE	28.1	-3.4%	47.1	1.8%
SONARBANS	39.3	1.8%	44.9	1.7%
PRIMEBANK	19.1	0.5%	43.2	1.6%
KPCL	47.6	-0.8%	41.7	1.6%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mm)	Market Cap. As (%)
GP	314.5	-0.8%	424,669	14.3%
BATC	1128.8	-1.8%	203,184	6.8%
SQURPHARMA	236.3	-0.5%	186,442	6.3%
UPGDCI	269	-1.3%	141,762	4.8%
RENATA	1289.5	-0.2%	103,851	3.5%
BERGERPBL	1463.5	-0.9%	67,874	2.3%
BRACBANK	52	-0.4%	64,136	2.2%
ICB	80.7	-0.4%	56,302	1.9%
MARICO	1712.5	-0.2%	53,944	1.8%
SUMITPOWER	37.2	-0.8%	39,725	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
GENEXIL	5% 15%	07.11.2019	24.12.2019	
NURANI	10%	06.11.2019	19.12.2019	

Performances of World Stock Indices					
Indices	Country	Index Value	Change	Change (%)	
DIA	USA	24,882	-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

ATLASBANG: Dividend Declaration
 The Board of Directors has recommended 5% cash dividend for the year ended on June 30, 2019. Date of AGM: 21.12.2019, Time: 02:30 PM, Venue: ABL Factory premises of the Company, 265-267 Tongi I/A, Gazipur. Record date: 24.11.2019. The Company has also reported EPS of Tk. (0.99), NAV per share of Tk. 133.00 and NOCFPS of Tk. (1.70) for the year ended on June 30, 2019 as against Tk. (1.11), Tk. 148.00 and Tk. 1.46 respectively for the same period of the previous year.

GBBPWR: Dividend Declaration
 The Board of Directors has recommended 10% cash dividend for the year ended on June 30, 2019. Date of AGM: 18.12.2019, Time: 9:30 AM, Venue: Conference Hall, Hotel Naz Garden, Silimpur, Bogura. Record Date: 03.12.2018. The Company has also reported EPS of Tk. 0.76, NAV per share of Tk. 20.30 and NOCFPS of Tk. 1.04 for the year ended on June 30, 2019, as against Tk. 0.94, Tk. 19.54 and Tk. (0.01) respectively for the same period of the previous year. The Company also informed that Net Operating Cash Flow per Share (NOCFPS) increases due to Income Tax Refund and Reduce of Cost & Expenses.

Commodity Prices				
Commodity	Latest	Change (%)	\$2W-Low	\$2W-High
Oil (\$/barrel)	57.0	1.4%	42.4	66.6
Gold (\$/Ounce)	1514.0	0.2%	1197.0	1566.0

Exchange Rates					
USD	EURO	GBP	RUPEE	CAD	
84.8	94.6	109.5	1.2	58.6	

*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://fk-rate.net

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