

BASL Daily Market Commentary

Tuesday, January 8, 2019

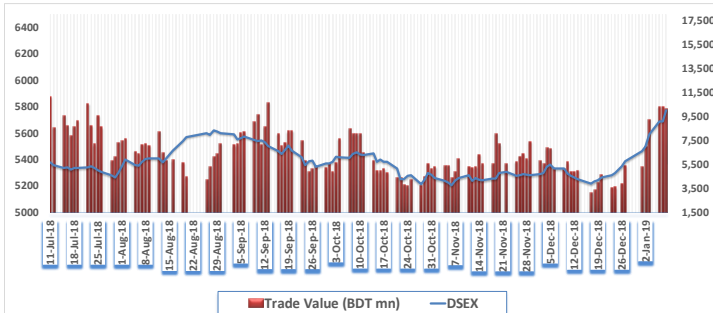
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000
info@basl-bd.com, Tel- 9515826-2, www.basl-bd.com



Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 115.6 points or 2.0% and closed at 5770.8 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 2001.2 and 1308.1 respectively. Turnover stood at BDT million 10100 (USD 121.7 million), about 4.61 % higher than the previous trading session's value. Most of the sectors witnessed bullish performance today. General Insurance Sector (+5.0%) was the highest gainer followed by Services & Real Estate (+4.9%) and Banks (+4.0%) respectively whereas IT sector (-0.7%) was the highest loser followed by Paper & Printing (-0.4%), Textile (-0.1%) respectively. BRACBANK (+4.1%) was the highest traded share with a turnover of BDT 230.0 million followed by JMISMDL (+8.7%) and BEXIMCO (+3.2%) respectively. Banks sector has highest turnover of 18.0% in the market. RUPALIBANK (+9.9%) was the today's top gainer while DELTASPINN (-9.9%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5770.8	5655.2	115.6	2.0%	-7.6%
DSES	1308.1	1289.5	18.5	1.4%	-5.9%
DS30	2001.2	1963.9	37.3	1.9%	-12.4%

Total Scripts	Advanced	Declined	Unchanged
330	238	85	23

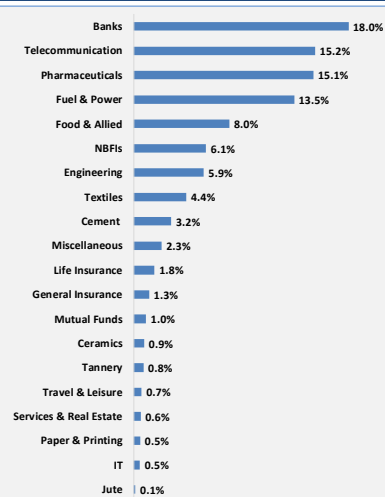
Market Indicators	Today	Last day	Market RSI (14)	Today	Last day
Market PE	15.46	15.19	83.50	79.37	

Market Statistics	Today	Last day	Change	Change (%)
Mn BDT	4,076,807	4,032,061	44,746	1.11%
Mn USD	49,118	48,579	539	
Mn BDT	10,100	9,655	445	4.61%
Mn USD	121.7	116.3	5.4	
Mn Shares	299.4	294.0	5.3	2%

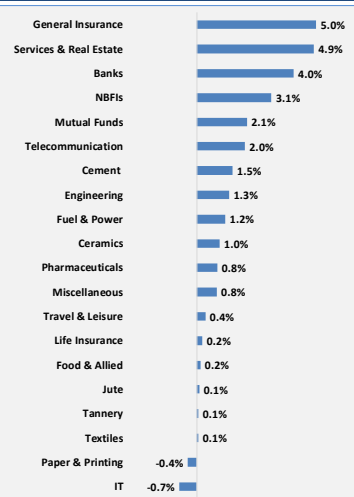
Sector Review

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	1568.7	15.7%	58.2%	627,087	18.0%	4.0%	11.2
Cement	7	183.1	1.8%	42.7%	109,673	3.2%	1.5%	39.8
Ceramics	5	85.1	0.8%	0.9%	30,237	0.9%	1.0%	22.4
Engineering	36	1411.5	14.1%	-9.6%	204,713	5.9%	1.3%	17.2
Food & Allied	17	527.4	5.3%	2.0%	278,774	8.0%	0.2%	20.7
Fuel & Power	19	716.8	7.2%	-1.8%	468,433	13.5%	1.2%	11.5
General Insurance	35	543.2	5.4%	47.8%	45,022	1.3%	5.0%	13.6
IT	8	358.9	3.6%	-16.7%	18,066	0.5%	-0.7%	22.2
Jute	3	81.2	0.8%	60.6%	5,053	0.1%	0.1%	229.3
Life Insurance	12	276.8	2.8%	58.0%	60,998	1.8%	0.2%	n/m
Miscellaneous	13	487.1	4.9%	5.7%	81,344	2.3%	0.8%	23.4
Mutual Funds	37	66.1	0.7%	-2.4%	36,336	1.0%	2.1%	16.3
NBFIs	23	574.1	5.7%	12.5%	211,444	6.1%	3.1%	25.9
Paper & Printing	3	55.6	0.6%	-26.4%	18,941	0.5%	-0.4%	26.2
Pharmaceuticals	31	1070.4	10.7%	10.0%	525,009	15.1%	0.8%	17.5
Services & Real Estate	4	117.3	1.2%	69.4%	20,374	0.6%	4.9%	14.4
Tannery	6	120.6	1.2%	1.7%	28,337	0.8%	0.1%	16.0
Telecommunication	2	163.4	1.6%	-23.9%	530,172	15.2%	2.0%	15.1
Textiles	53	1545.2	15.4%	-20.4%	153,588	4.4%	0.1%	17.8
Travel & Leisure	4	65.9	0.7%	-33.5%	23,012	0.7%	0.4%	27.7

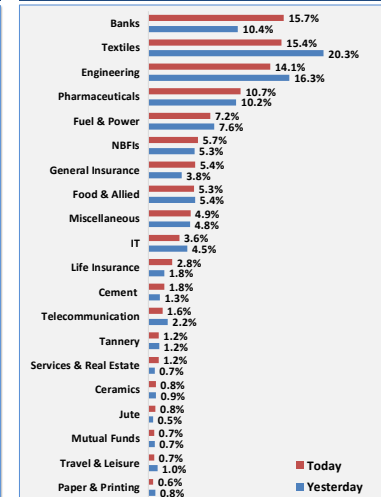
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



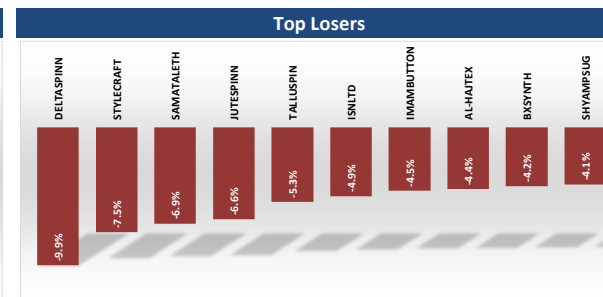
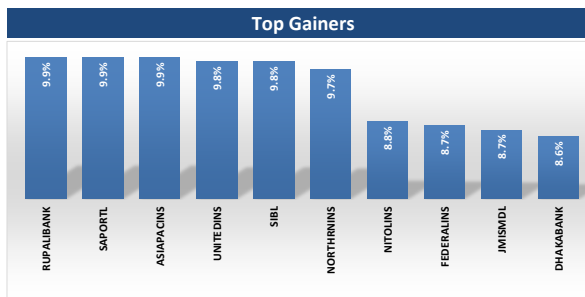
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
BRACBANK	78.9	4.1%	230.0	2.3%
JMISMDL	399.9	8.7%	205.5	2.1%
BEXIMCO	26.1	3.2%	200.5	2.0%
ALIF	12.9	6.6%	195.0	1.9%
OLYMPIC	245.9	0.7%	186.3	1.9%
UPGDCL	332.9	1.2%	174.5	1.7%
ACTIVEFINE	32	3.6%	170.5	1.7%
IFADAUTOS	112.3	1.8%	168.1	1.7%
BBSABLES	106.9	0.0%	167.0	1.7%
DHAKABANK	16.5	8.6%	163.0	1.6%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	379.7	2.0%	512,709	14.7%
BATBC	3450.1	-0.1%	207,006	6.0%
SQURPHARMA	258.9	0.8%	204,274	5.9%
UPGDCL	332.9	1.2%	159,488	4.6%
RENATA	1147.8	0.4%	92,439	2.7%
ICB	130.9	4.5%	91,326	2.6%
BRACBANK	78.9	4.1%	84,620	2.4%
LHBL	47.8	1.7%	55,514	1.6%
OLYMPIC	245.9	0.7%	49,165	1.4%
SUMITPOWER	42	2.4%	44,851	1.3%

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

GOLDENSON: Credit Rating Result

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the Entity Rating (Surveillance) of the Company as "BBB2" along with a stable outlook based on audited financial statements up to June 30, 2018 and bank liability position as on November 30, 2018.

Comodity Prices

Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	48.6	0.3%	42.4	76.9
Gold (\$/Ounce)	1283.7	-0.5%	1167.0	1369.0

Exchange Rates

USD	EURO	GBP	RUPEE	CAD
83.9	96.0	107.1	1.2	59.8

*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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