

BASL Daily Market Commentary

Thursday, August 8, 2019

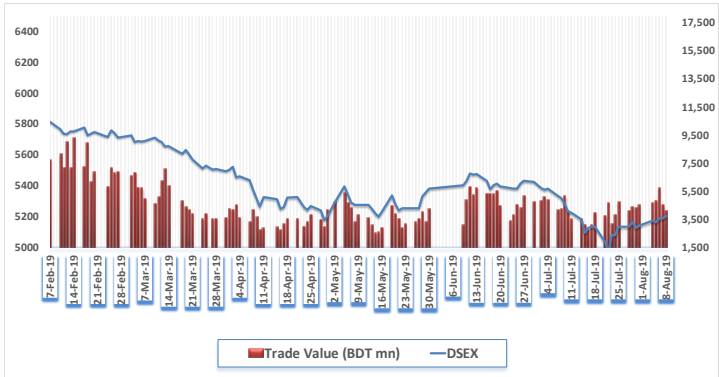
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000
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Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 14.2 points or 0.3% and closed at 5201.4 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1837.8 and 1192.2 respectively. Turnover stood at BDT million 4106 (USD 49.5 million), about 8.57% lower than the previous trading session's value. Most of the sectors witnessed bullish performance today. Mutual Fund sector (+3.3%) was the highest gainer followed by General Insurance Sector (+2.0%) and Life Insurance sector (+1.9%) respectively whereas Jute Sector (-2.1%) was the highest loser followed by Services & Real Estate sector (-0.7%) and Telecommunication Sector (-0.2%) respectively. UPGDCL (+1.2%) was the highest traded share with a turnover of BDT 273.1 million followed by KPCL (+3.0%) and JMISDL (-0.7%) respectively. Banks sector has highest turnover of 17.5% in the market. SEMLLECMF (+10.0%) was the today's top gainer while UNITEDAIR (-6.3%) was the top loser today.

Last Six Months Market Movement

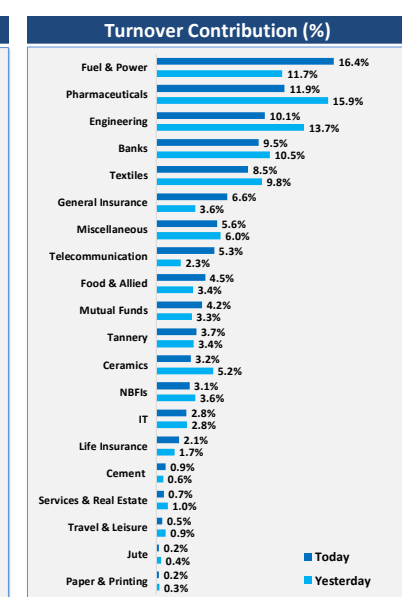
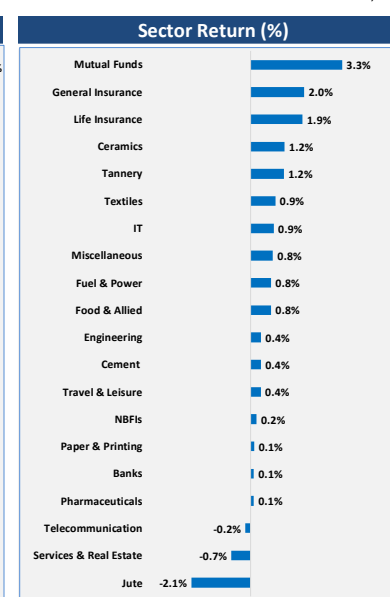
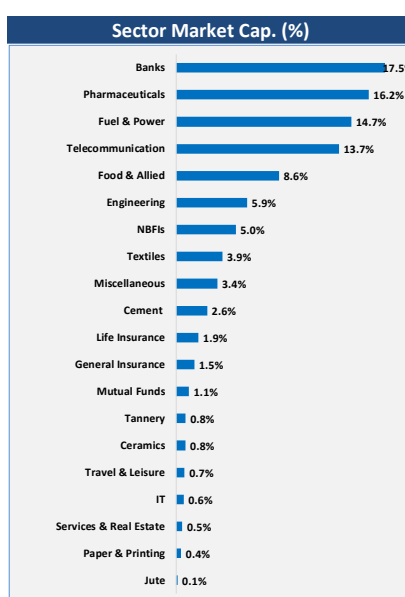


Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5201.4	5187.2	14.2	0.3%	-16.7%
DSES	1192.2	1190.0	2.2	0.2%	-14.3%
DS30	1837.8	1837.0	0.8	0.0%	-19.5%
Total Scrips					
	Advanced	Declined	Unchanged	Not Traded	
	356	228	63	3	
Market Indicators					
	Today	Last day			
Market PE	14.19	14.13	Market RSI (14)		
			51.79	49.91	
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,866,263	3,852,371	13,892	0.36%
	Mn USD	46,581	46,414	167	
Turnover	Mn BDT	4,106	4,490	(385)	-8.57%
	Mn USD	49.5	54.1	(4.6)	
Volume	Mn Shares	97.9	129.5	(31.5)	-24%

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	326.8	9.5%	-28.7%	577,420	17.5%	0.1%	8.2
Cement	7	29.4	0.9%	8.3%	85,672	2.6%	0.4%	28.9
Ceramics	5	109.9	3.2%	-52.0%	25,729	0.8%	1.2%	24.3
Engineering	39	346.7	10.1%	-42.0%	195,819	5.9%	0.4%	16.4
Food & Allied	17	155.6	4.5%	5.5%	283,949	8.6%	0.8%	28.2
Fuel & Power	19	566.3	16.4%	11.2%	484,405	14.7%	0.8%	13.5
General Insurance	35	227.0	6.6%	45.2%	49,895	1.5%	2.0%	12.9
IT	9	96.3	2.8%	-21.9%	20,796	0.6%	0.9%	21.3
Jute	3	8.5	0.2%	-55.2%	3,726	0.1%	-2.1%	68.1
Life Insurance	12	72.5	2.1%	-0.6%	61,563	1.9%	1.9%	n/m
Miscellaneous	13	193.5	5.6%	-25.6%	113,516	3.4%	0.8%	24.0
Mutual Funds	37	145.5	4.2%	1.7%	35,586	1.1%	3.3%	16.6
NBFIs	23	105.5	3.1%	-32.9%	164,413	5.0%	0.2%	19.4
Paper & Printing	3	7.9	0.2%	-31.4%	13,590	0.4%	0.1%	38.1
Pharmaceuticals	32	409.7	11.9%	-41.0%	532,678	16.2%	0.1%	17.6
Services & Real Estate	4	23.6	0.7%	-48.2%	16,981	0.5%	-0.7%	16.5
Tannery	6	127.2	3.7%	-15.4%	25,914	0.8%	1.2%	24.4
Telecommunication	2	184.3	5.3%	85.3%	450,445	13.7%	-0.2%	12.3
Textiles	55	293.5	8.5%	-31.2%	127,389	3.9%	0.9%	16.7
Travel & Leisure	5	18.9	0.5%	-50.6%	23,240	0.7%	0.4%	25.0



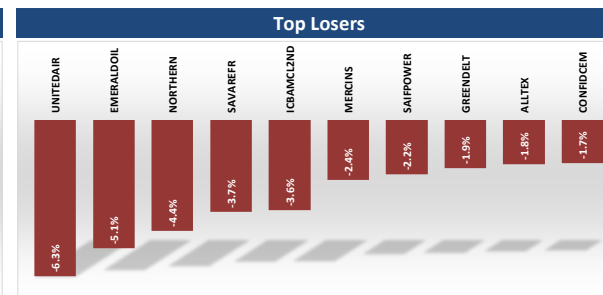
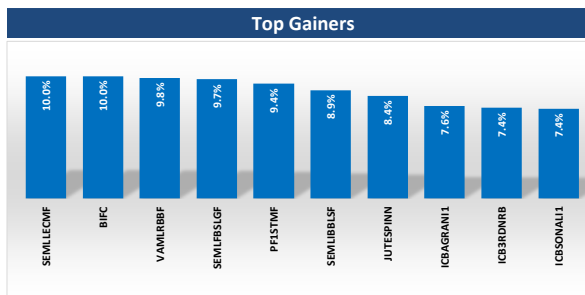
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
UPGDCL	395.1	1.2%	273.1	7.9%
KPCL	58.4	3.0%	154.4	4.5%
JMISMDL	509.8	-0.7%	104.7	3.0%
GP	317.7	-0.3%	102.2	3.0%
FORTUNE	40.3	3.6%	93.1	2.7%
BSC	58.2	3.9%	91.0	2.6%
MONNOCERA	212.3	3.3%	88.9	2.6%
BANGAS	318.9	6.6%	86.9	2.5%
BSCCL	130.1	3.3%	82.1	2.4%
SQURPHARMA	251.1	-0.8%	69.5	2.0%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	317.7	-0.3%	428,990	13.0%
BATBC	1227.4	0.9%	220,932	6.7%
SQURPHARMA	251.1	-0.8%	198,120	6.0%
UPGDCL	395.1	1.2%	189,287	5.7%
RENATA	1187.6	-0.2%	95,644	2.9%
BRACBANK	61.6	-1.0%	75,976	2.3%
ICB	106.9	0.6%	74,582	2.3%
BERGERPBL	1509.5	0.6%	70,007	2.1%
MARICO	1790.5	1.9%	56,401	1.7%
LHBL	40.2	1.0%	46,687	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

FAREASTLIF: Dividend Declaration

The Board of Directors has recommended 20% cash dividend for the year ended on December 31, 2018. Date of AGM: 29.09.2019, Time: 10:30 AM, Venue: Fareast Tower, 35 Topkhana Road, Dhaka-1000. Record Date: 05.09.2019.

BRACBANK: Sale declaration of a Nominated Director

Mr. Syed S. Kaiser Kabir, Nominated Director of BRAC Bank Ltd., has expressed his intention to sell his entire holding of 1,58,125 shares of the Company at prevailing market price (in the Public Market) through Stock Exchanges (DSE) within next 30 working days.

Commodity Prices

Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	52.6	2.9%	42.4	76.9
Gold (\$/Ounce)	1508.3	-0.7%	1167.0	1523.0

Exchange Rates

USD	EURO	GBP	RUPEE	CAD
84.4	94.6	102.6	1.2	57.3

*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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