

BASL Daily Market Commentary

Sunday, October 8, 2023

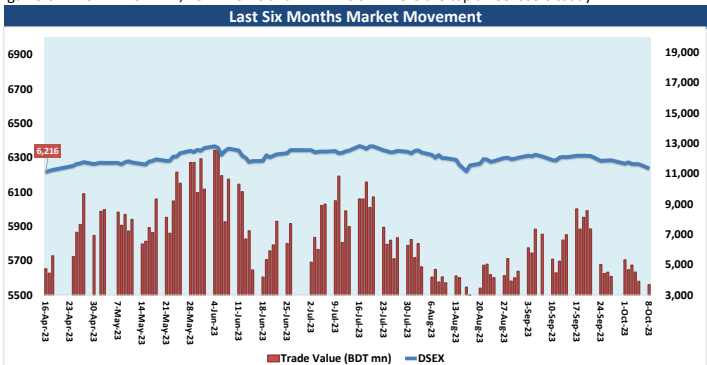
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Today's Market Snippet

The DSE broad Index- DSEX closed in red today. The benchmark index declined by 24.5 points or 0.4% and closed at 6237.2 points today. The blue-chip index DS30 has closed in red by 6.9 or 0.3% to 2130.7 and the shariah based index DSES also declined by 4.6 or 0.3% to 1351.3 respectively. Turnover stood at BDT million 3,678 (USD 33.5 million), about 5.60% lower than that of the previous trading session's value. Tannery (+0.1%), Telecom (0.0%) and NBFi (+0.0%) were the top three gaining sectors whereas Gen. Insurance (-4.2%), IT (-2.6%) and Services (-1.6%) were the top three losing sectors today. Gen. Insurance Sector generated lead turnover position of 24.3% in the whole market. SEAPEARL, GEMINISEA and LHBL were the most three active stocks in the market. CENTRALPHL, EMERALDOIL and NTC were the today's top three gainers while MIRACLEIND, ASIAPACINS and PARAMOUNT were the top three losers today.

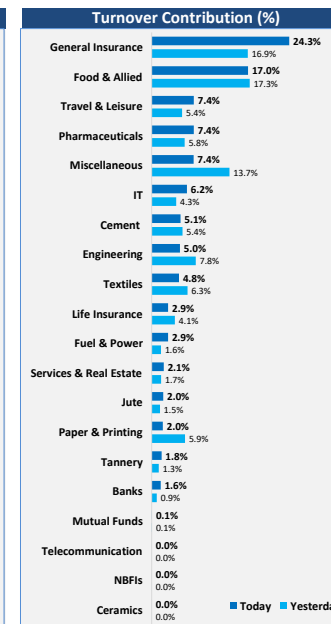
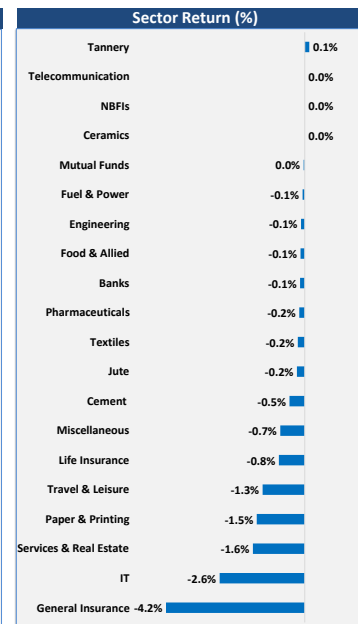
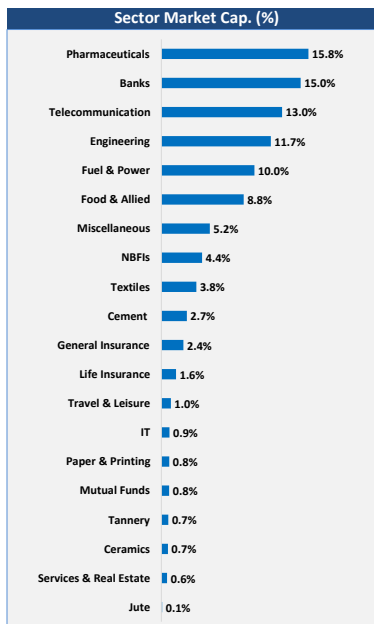


Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	6237.2	6261.7	-24.5	-0.4%	15.9%
DS30	2130.7	2137.7	-6.9	-0.3%	8.8%
DSES	1351.3	1355.8	-4.6	-0.3%	9.2%
DSMEX	1215.3	1257.6	-42.4	-3.4%	-77.6%

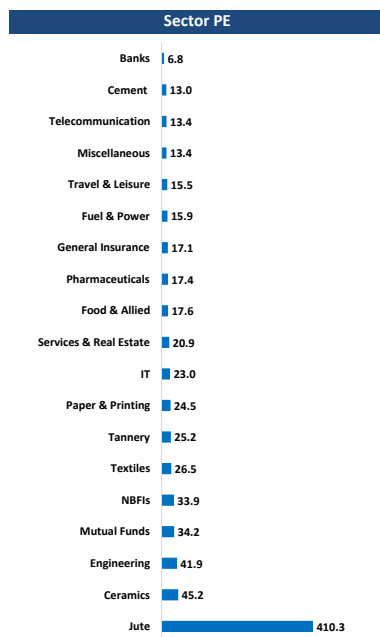
Total Scrips		Advanced	Declined	Unchanged	Not Traded			
		392	14	134	95			
Market Indicators	Today	Last day	Market RSI (14)		Today	Last day		
Market PE	14.88	14.93			42.45	46.85		
Market Statistics	Today		Last day		Change	Change (%)		
Market Cap	Mn BDT	7,753,987	7,767,772	(13,785)	-0.18%			
	Mn USD	70,619	70,745	(126)				
Turnover	Mn BDT	3,678	3,897	(218)	-5.60%			
	Mn USD	33.5	35.5	(2.0)				
Volume	Mn Shares	81.5	69.0	12.5	18%			
Turnover Composition	Top 20 Cos.		Top 15 Cos.		Top 10 Cos.		Top 5 Cos.	
	Mn BDT	1,399	1,150	845	463			
	%	38.0%	31.3%	23.0%	12.6%			

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	33	50.6	1.6%	60.9%	669,469	15.0%	-0.1%	6.8
Cement	7	161.0	5.1%	-15.2%	122,326	2.7%	-0.5%	13.0
Ceramics	5	0.0	0.0%	-93.4%	31,446	0.7%	0.0%	45.2
Engineering	42	157.6	5.0%	-41.9%	526,028	11.7%	-0.1%	41.9
Food & Allied	21	536.7	17.0%	-11.0%	395,463	8.8%	-0.1%	17.6
Fuel & Power	23	91.6	2.9%	59.7%	447,270	10.0%	-0.1%	15.9
General Insurance	42	765.9	24.3%	29.5%	105,931	2.4%	-4.2%	17.1
IT	11	196.4	6.2%	30.2%	38,846	0.9%	-2.6%	23.0
Jute	3	64.5	2.0%	25.8%	3,917	0.1%	-0.2%	410.3
Life Insurance	12	91.7	2.9%	-35.9%	70,585	1.6%	-0.8%	n/m
Miscellaneous	15	233.7	7.4%	-51.2%	232,909	5.2%	-0.7%	13.4
Mutual Funds	36	2.0	0.1%	-5.7%	37,328	0.8%	0.0%	34.2
NBFIs	23	0.0	0.0%	-85.7%	195,743	4.4%	0.0%	33.9
Paper & Printing	6	62.3	2.0%	-69.7%	37,958	0.8%	-1.5%	24.5
Pharmaceuticals	32	234.4	7.4%	15.4%	706,974	15.8%	-0.2%	17.4
Services & Real Estate	4	67.4	2.1%	15.5%	27,366	0.6%	-1.6%	20.9
Tannery	6	55.3	1.8%	26.2%	33,383	0.7%	0.1%	25.2
Telecommunication	3	0.3	0.0%	74.5%	580,232	13.0%	0.0%	13.4
Textiles	58	152.3	4.8%	-31.0%	168,144	3.8%	-0.2%	26.5
Travel & Leisure	4	234.6	7.4%	25.3%	45,884	1.0%	-1.3%	15.5



Most Active Stocks					Top Gainers				Top Losers			
Scrips	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)	Scrips	Price	Change (%)	Forward PE	Scrip	Price	Change (%)	Forward PE
SEAPEARL	193.3	0.6%	176.9	5.6%	CENTRALPHL	12.2	9.9%	n/a	MIRACLEIND	38.9	-8.9%	n/a
GEMINISEA	791.3	-1.5%	144.6	4.6%	EMERALDOIL	118.7	6.8%	153.49	ASIAPACINS	52.4	-8.9%	12.84
LHBL	69.9	-0.1%	141.2	4.5%	NTC	444	1.4%	n/a	PARAMOUNT	57.9	-7.9%	25.85
FUWANGFOOD	28.7	-4.3%	96.7	3.1%	APEXTANRY	105.9	1.0%	n/a	BGIC	56.4	-7.7%	22.2
BSC	112.3	-4.0%	90.9	2.9%	BATASHOE	984.6	1.0%	15.35	REPUBLIC	52.3	-7.6%	21.26
BNICL	58.7	-7.4%	66.0	2.1%	AIL	71.4	0.7%	44.63	KBPPWBIL	24.6	-7.5%	n/a
CRYSTALINS	103.9	0.1%	65.3	2.1%	SEAPEARL	193.3	0.6%	21.87	BNICL	58.7	-7.4%	16.87
HRTEX	118.7	-1.7%	63.5	2.0%	PRAGATILIF	103.8	0.5%	-	JANATAINS	36	-7.2%	15.79
SONALIANS	536.1	0.1%	63.2	2.0%	JAMUNAOIL	177.1	0.2%	6.38	KARNAPHULI	35.1	-6.9%	16.4
PROVATIINS	58.9	-2.2%	62.7	2.0%	ECABLES	181.6	0.2%	309.55	MEGHNAINS	39.5	-6.8%	20.15



Lowest PE Instruments

Scrips	PE	Price	Change	Turnover As (%)
JAMUNABANK	3.31	20.9	0.0%	0.4%
BANKASIA	3.51	20.2	0.0%	0.5%
SHAHJABANK	3.73	18.3	0.0%	0.5%
FIRSTSBANK	3.87	8.9	0.0%	0.2%
PREMIERBAN	4.21	12.8	0.0%	0.4%
EXIMBANK	4.30	10.4	0.0%	0.3%
NCCBANK	4.37	13.1	0.0%	0.3%
SOUTHEASTB	4.43	13.3	0.0%	0.4%
PUBALIBANK	4.76	25.8	0.0%	0.6%
DHAKABANK	4.77	12.5	0.0%	0.3%
MERCANBANK	5.00	13.3	0.0%	0.3%
PRIMEBANK	5.21	20.1	0.0%	0.5%
UNIONBANK	5.30	8.9	0.0%	0.2%
CITYBANK	5.43	21.4	0.0%	0.6%
SHURWID	5.52	13.9	0.0%	0.0%
GIB	5.81	8.6	0.0%	0.2%
MPETROLEUM	6.08	202.4	-0.4%	0.5%
NCCBLMF1	6.19	6.8	0.0%	0.0%
JAMUNAOIL	6.38	177.1	0.2%	0.4%
BSC	6.74	112.3	-4.0%	0.4%
PADMAOIL	7.00	209.2	0.0%	0.5%
MTB	7.05	15.5	0.0%	0.3%
EBL	7.31	29.4	0.0%	0.8%
ISLAMIBANK	7.65	32.6	0.0%	1.2%
ACMELAB	7.99	85.0	0.0%	0.4%

Highest PE Instruments

Scrips	PE	Price	Change	Turnover As (%)
PHARMAID	11860.50	790.7	0.0%	0.1%
FINEFOODS	3199.14	123.7	0.1%	0.0%
NLTUBES	993.75	79.5	0.0%	0.1%
DACCADYE	990.00	13.2	0.0%	0.0%
GHAIL	656.25	17.5	0.0%	0.1%
POPULAR1MF	510.00	5.1	0.0%	0.0%
AMANFEED	502.50	33.5	0.0%	0.1%
ISLAMICFIN	492.50	19.7	0.0%	0.1%
AMBEEPHA	476.59	851.5	-4.0%	0.0%
SSSTEEL	461.11	16.6	0.0%	0.1%
AFTABAUTO	459.38	24.5	-0.4%	0.1%
KAY&QUE	408.96	196.3	-1.8%	0.0%
BANGAS	400.00	112.0	-3.2%	0.0%
TITASGAS	383.44	40.9	0.0%	0.9%
SONARGAON	354.64	33.1	0.0%	0.0%
MONNOAGML	311.85	860.7	-2.3%	0.1%
ECABLES	309.55	181.6	0.2%	0.1%
SONALIANS	304.60	536.1	0.1%	0.1%
ICBAMCL2ND	290.00	8.7	0.0%	0.0%
NFML	247.50	13.2	-2.2%	0.0%
MONNOCERA	229.45	97.9	0.0%	0.1%
ESQUIRENIT	215.63	34.5	0.0%	0.1%
BDAUTOCA	213.19	133.6	-1.7%	0.0%
MONNOFABR	200.83	24.1	0.0%	0.1%
JMISMDL	177.43	255.5	0.0%	0.2%

Market Leaders Composition

Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
SEAPEARL	193.3	0.6%	23,341	0.5%
GEMINISEA	791.3	-1.5%	4,831	0.1%
LHBL	69.9	-0.1%	81,180	1.8%
FUWANGFOOD	28.7	-4.3%	3,181	0.1%
BSC	112.3	-4.0%	17,130	0.4%
BNICL	58.7	-7.4%	2,597	0.1%
CRYSTALINS	103.9	0.1%	4,156	0.1%
HRTEX	118.7	-1.7%	3,469	0.1%
SONALIANS	536.1	0.1%	2,908	0.1%
PROVATIINS	58.9	-2.2%	2,374	0.1%

Upcoming Record Date & AGM date for Dividends/Right Offerings

Scrip	Declaration	Record Date	AGM Date
ADNTEL	15%C	26.10.2023	04.12.2023
APEXFOODS	20%C	26.10.2023	30.11.2023
APEXSPINN	20%C	26.10.2023	30.11.2023
DESHBANDHU	2.5%C	23.10.2023	27.11.2023

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**SPCL: Agreement between Petromax Refinery Ltd and Mongla Port Authority**

The Company has informed that Petromax Refinery Ltd (PRL) a subsidiary of Shahjibazar Power Co. Ltd. (SPCL) has inked a Long-Term Lease Agreement with Mongla Port Authority (MPA) for 13 Acre of land for 30 years lease period. PRL shall utilize the said land for the expansion of existing storage facilities by installing storage tanks and future enhancement of refining capacity depending on the market demand.

MTB: Sale and Buy confirmations of a sponsor and a director

Associated Builders Corporation Ltd., a Sponsor of the Company, has further informed that it has completed its sale of 21,36,300 shares and Mr. Rashed Ahmed Chowdhury, a Director of the company, has informed that he has completed his buying of 21,36,300 shares at prevailing market price through Dhaka Stock Exchange Limited as per declaration news disseminated by DSE on 04.10.2023.

Exchange Rates

USD	EURO	GBP	RUPEE	CAD
109.8	120.6	134.3	1.1	80.2

*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
Source: www.dsebd.org, www.bloomberg.com, www.finance.yahoo.com, <http://money.cnn.com>, <https://fx-rate.net>

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