

# BASL Daily Market Commentary

Monday, June 10, 2019

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

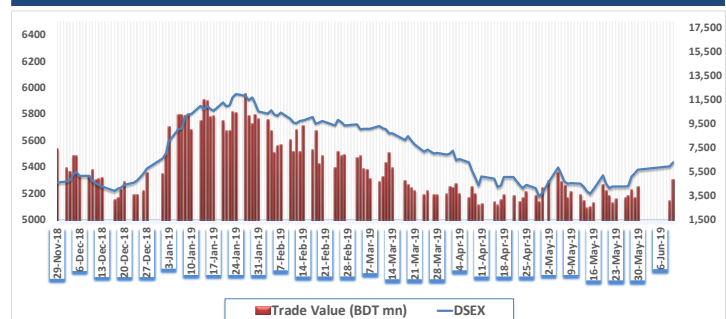


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## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 28.6 points or 0.5% and closed at 5431.6 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1901.7 and 1232.0 respectively. Turnover stood at BDT million 4849 (USD 58.4 million), about 59.15% higher than the previous trading session's value. Most of the sectors witnessed bullish performance today. Fuel & Power Sector was the highest gainer Sector (+2.0%) followed by Food & Allied sector (2.0%), Textiles sector (+1.8%) and Cement Sector (+1.5%) respectively whereas Banks Sector (-0.9%) was the highest loser followed by NBFIs Sector (-0.7%) and Life Insurance Sector (-0.4%) respectively. UPGDCL (+3.3%) was the highest traded share with a turnover of BDT 233.6 million followed by KPCL (+6.7%) and BRACBANK (-0.5%) respectively. Banks sector has highest turnover of 17.1% in the market. SEMLFBSLGF (+11.0%) was the today's top gainer while AIBL1STIMF (-9.8%) was the top loser today.

## Last Six Months Market Movement



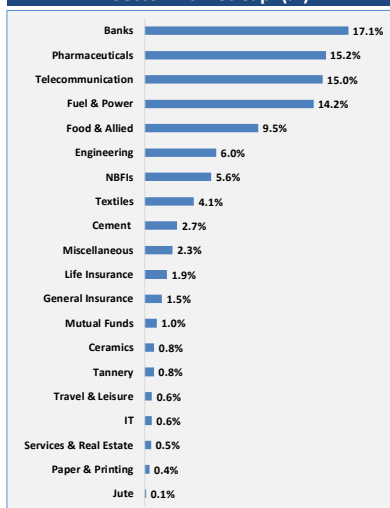
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5431.6	5403.0	28.6	0.5%	-13.0%
DSES	1232.0	1220.1	11.9	1.0%	-11.4%
DS30	1901.7	1889.0	12.6	0.7%	-16.7%
Total Scripts					
	Advanced	Declined	Unchanged		
	330	210	102	39	
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	14.21	14.12	Market RSI (14)	63.34	60.86
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap					
Mn BDT	3,990,652	3,967,430	23,221	0.59%	
Mn USD	48,080	47,800	280		
Turnover					
Mn BDT	4,849	3,047	1,802	59.15%	
Mn USD	58.4	36.7	21.7		
Volume					
Mn Shares	131.1	90.8	40.3	44%	

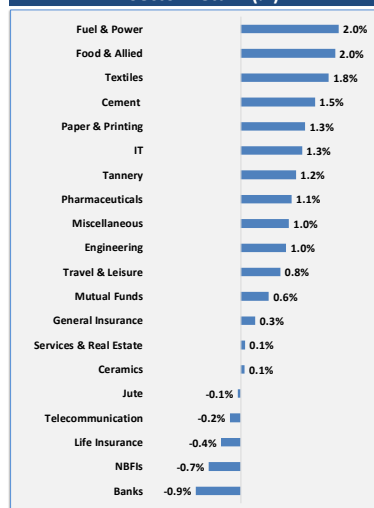
## Sector Review

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	524.4	12.2%	109.3%	576,523	17.1%	-0.9%	9.7
Cement	7	48.4	1.1%	124.9%	92,323	2.7%	1.5%	28.0
Ceramics	5	58.9	1.4%	32.8%	26,742	0.8%	0.1%	22.4
Engineering	36	462.6	10.8%	35.0%	202,366	6.0%	1.0%	17.6
Food & Allied	17	220.1	5.1%	154.6%	321,061	9.5%	2.0%	11.8
Fuel & Power	19	643.3	15.0%	94.0%	477,722	14.2%	2.0%	13.1
General Insurance	35	330.6	7.7%	-11.6%	48,878	1.5%	0.3%	12.7
IT	8	71.3	1.7%	13.7%	20,166	0.6%	1.3%	20.6
Jute	3	5.3	0.1%	-6.5%	3,822	0.1%	-0.1%	69.9
Life Insurance	12	239.8	5.6%	-16.4%	63,234	1.9%	-0.4%	n/m
Miscellaneous	13	229.0	5.3%	96.7%	79,146	2.3%	1.0%	21.4
Mutual Funds	37	36.1	0.8%	96.6%	34,122	1.0%	0.6%	12.2
NBFIs	23	187.2	4.4%	-31.8%	188,506	5.6%	-0.7%	20.4
Paper & Printing	3	11.4	0.3%	138.3%	13,820	0.4%	1.3%	38.7
Pharmaceuticals	31	333.3	7.8%	68.2%	512,535	15.2%	1.1%	17.8
Services & Real Estate	4	42.0	1.0%	-67.0%	17,983	0.5%	0.1%	17.5
Tannery	6	97.5	2.3%	33.3%	26,070	0.8%	1.2%	33.7
Telecommunication	2	94.2	2.2%	20.9%	503,721	15.0%	-0.2%	13.9
Textiles	53	635.7	14.8%	146.5%	139,545	4.1%	1.8%	18.2
Travel & Leisure	4	16.0	0.4%	110.8%	20,926	0.6%	0.8%	25.0

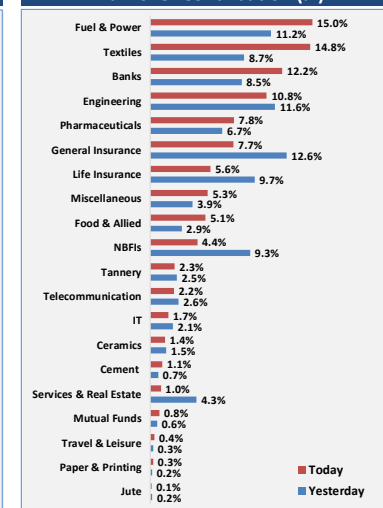
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



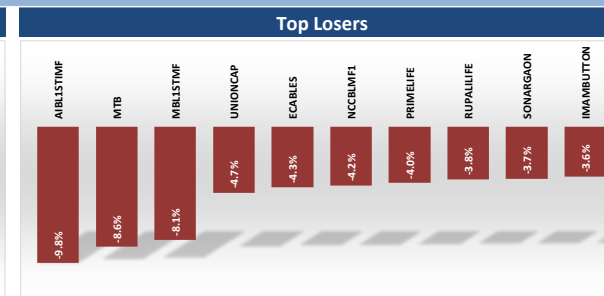
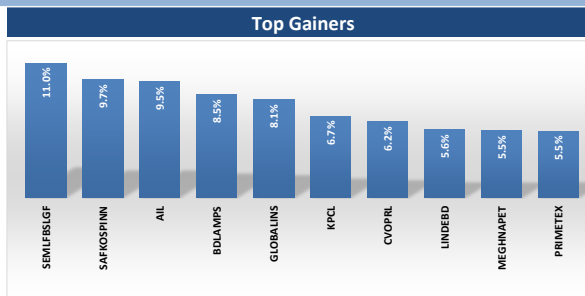
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
UPGDCL	364.2	3.3%	233.6	5.4%
KPCL	60.7	6.7%	163.7	3.8%
BRACBANK	64.2	-0.5%	147.0	3.4%
BATBC	1413.6	2.2%	133.6	3.1%
NATLIFEINS	244.4	1.6%	122.2	2.8%
AIL	62.1	9.5%	113.0	2.6%
BBSABLES	97.6	1.7%	81.2	1.9%
JMISMMDL	385.6	5.3%	78.4	1.8%
FORTUNE	36.1	-0.3%	72.6	1.7%
AMANFEED	46	4.5%	65.2	1.5%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	355.8	-0.2%	480,437	14.3%
BATBC	1413.6	2.2%	254,448	7.6%
SQURPHARMA	256.2	0.9%	202,144	6.0%
UPGDCL	364.2	3.3%	174,483	5.2%
RENATA	1177.3	0.9%	94,815	2.8%
ICB	118.5	-1.0%	82,675	2.5%
BRACBANK	64.2	-0.5%	68,855	2.0%
LHBL	40.9	2.0%	47,500	1.4%
MARICO	1460.1	1.9%	45,993	1.4%
OLYMPIC	229.7	1.2%	45,926	1.4%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
NBL	10%\$	16.06.2019	20.08.2019	
PURABIGEN	12%\$	16.06.2019	18.07.2019	
ONEBANKLTD	10%\$	16.06.2019	01.08.2019	
GLOBALINS	5%\$	24.06.2019	03.08.2019	

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

### MERCINS: Buy Confirmation of a Public Shareholder Director

Mr. Nurul Azim Sunny, one of the Directors (Public Shareholder Director) of the Company, has completed his buying of 8,62,277 shares of the Company at prevailing market price through Stock Exchange as per declaration disseminated on 28.05.2019.

## Commodity Prices

Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	54.1	0.1%	42.4	76.9
Gold (\$/Ounce)	1332.5	-1.0%	1167.0	1353.0

## Exchange Rates

USD	EURO	GBP	RUPEE	CAD
84.1	95.1	106.8	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://fx-rate.net

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