

# BASL Daily Market Commentary

Wednesday, March 13, 2019

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

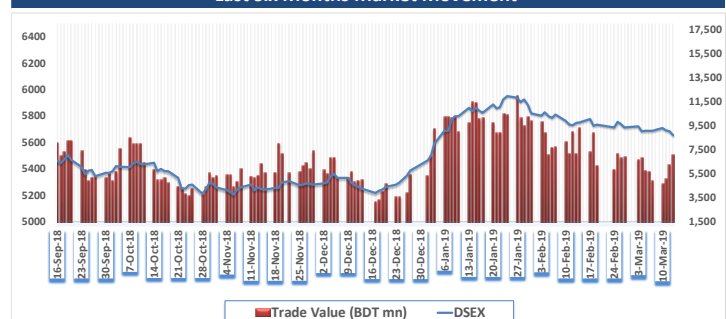


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## Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index decreased by 29.2 points or 0.5% and closed at 5653.2 points today. The blue-chip index DS30 and the shariah based index DSES both closed in red, closing to 2005.5 and 1292.2 respectively. Turnover stood at BDT million 7081 (USD 85.3 million), about 13.85% higher than the previous trading session's value. Most of the sectors witnessed bearish performance today. Miscellaneous Sector (+2.2%) was the highest gainer followed by Tannery (+1.6%) and Banks Sector (+1.6%) respectively whereas Ceramics Sector (-4.2%) was the highest loser followed by IT (-2.5%) and Paper & Printing (-2.1%) respectively. DUTCHBANGL (-15.2%) was the highest traded share with a turnover of BDT 624.0 million followed by BATBC (-0.7%) and UPGDCL (+1.2%) respectively. Banks sector has highest turnover of 17.3% in the market. DUTCHBANGL (+15.2%) was the today's top gainer while REPUBLIC (-9.1%) was the top loser today.

## Last Six Months Market Movement



## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5653.2	5682.4	-29.2	-0.5%	-9.5%
DSES	1292.2	1303.9	-11.7	-0.9%	-7.1%
DS30	2005.5	2013.8	-8.3	-0.4%	-12.2%

Total Scrips	Advanced	Declined	Unchanged
330	71	242	33

Market Indicators	Today	Last day	Today	Last day	
Market PE	16.35	16.40	Market RSI (14)	38.86	42.40

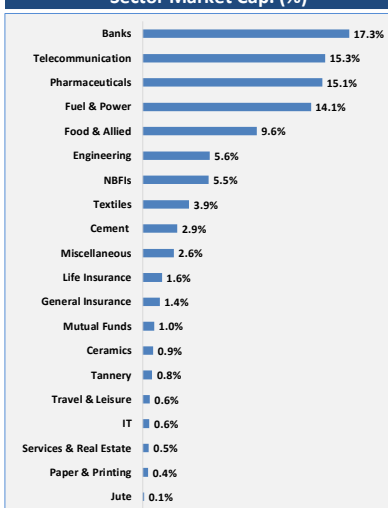
  

Market Statistics	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	4,180,575	4,188,586	(8,011)	-0.19%
	Mn USD	50,368	50,465	(97)	
Turnover	Mn BDT	7,081	6,220	861	13.85%
	Mn USD	85.3	74.9	10.4	
Volume	Mn Shares	140.9	113.1	27.8	25%

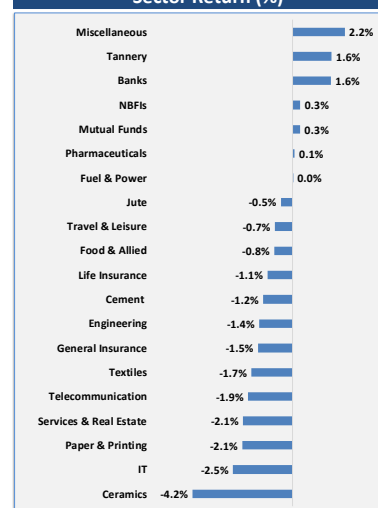
## Sector Review

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	1649.4	24.8%	115.2%	618,398	17.3%	1.6%	11.0
Cement	7	71.0	1.1%	-47.2%	103,681	2.9%	-1.2%	35.0
Ceramics	5	106.5	1.6%	-74.9%	31,158	0.9%	-4.2%	19.4
Engineering	36	750.1	11.3%	2.5%	200,828	5.6%	-1.4%	17.7
Food & Allied	17	521.2	7.8%	-41.2%	341,021	9.6%	-0.8%	26.9
Fuel & Power	19	703.4	10.6%	9.8%	503,936	14.1%	0.0%	13.3
General Insurance	35	379.0	5.7%	34.3%	50,885	1.4%	-1.5%	14.5
IT	8	141.6	2.1%	-27.1%	20,642	0.6%	-2.5%	20.3
Jute	3	18.8	0.3%	79.3%	4,080	0.1%	-0.5%	85.9
Life Insurance	12	41.1	0.6%	-7.2%	57,619	1.6%	-1.1%	n/m
Miscellaneous	13	258.1	3.9%	17.1%	93,166	2.6%	2.2%	27.4
Mutual Funds	37	24.2	0.4%	-4.9%	34,279	1.0%	0.3%	13.1
NBFIs	23	292.5	4.4%	46.5%	197,512	5.5%	0.3%	24.7
Paper & Printing	3	22.7	0.3%	54.2%	16,001	0.4%	-2.1%	34.9
Pharmaceuticals	31	541.8	8.1%	1.7%	537,592	15.1%	0.1%	18.9
Services & Real Estate	4	55.1	0.8%	50.3%	18,567	0.5%	-2.1%	16.9
Tannery	6	224.3	3.4%	16.7%	28,813	0.8%	1.6%	17.4
Telecommunication	2	229.7	3.5%	-16.8%	546,612	15.3%	-1.9%	15.3
Textiles	53	606.7	9.1%	16.3%	139,136	3.9%	-1.7%	18.8
Travel & Leisure	4	20.2	0.3%	-22.5%	21,292	0.6%	-0.7%	28.9

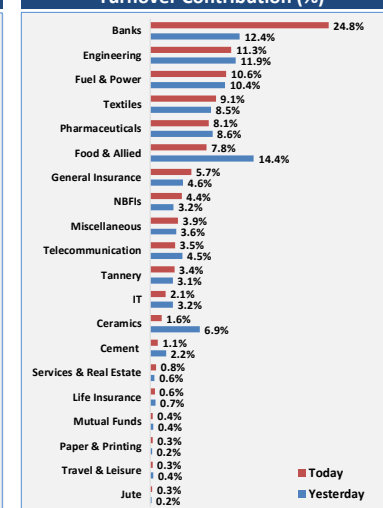
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



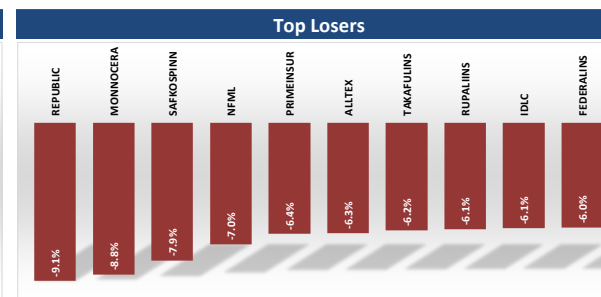
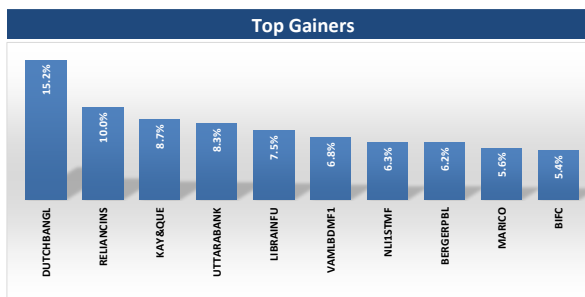
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
DUTCHBANGL	217.7	15.2%	624.0	9.4%
BATBC	4549.4	-0.7%	435.5	6.5%
UPGDCL	403.8	1.2%	403.2	6.1%
BRACBANK	84.1	1.6%	237.7	3.6%
UTTARABANK	31.3	8.3%	200.3	3.0%
SINGERBD	271.9	0.7%	162.9	2.4%
FORTUNE	35.1	-3.0%	137.5	2.1%
BSCL	158.1	-1.4%	126.9	1.9%
PREMIERBAN	15.4	0.7%	120.0	1.8%
RUPALIBANK	45.7	5.3%	113.6	1.7%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	385.5	-1.9%	520,541	14.6%
BATBC	4549.4	-0.7%	272,964	7.7%
SQURPHARMA	266.4	-0.8%	210,192	5.9%
UPGDCL	403.8	1.2%	193,455	5.4%
RENATA	1174.8	0.9%	94,613	2.7%
BRACBANK	84.1	1.6%	90,197	2.5%
ICB	122	2.3%	85,116	2.4%
LHBL	45	-1.5%	52,262	1.5%
MARICO	1547.8	5.6%	48,756	1.4%
BERGERPBL	2068.7	6.2%	47,971	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
RELIANCINS	15%C 10%S	13.03.2019	31.03.2019	
LINDEBD	375%C	25.03.2019	30.04.2019	
PARAMOUNT	5%B	28.03.2019	15.04.2019	
DUTCHBANGL	150%S	07.04.2019	29.04.2019	

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

### DUTCHBANGL: Dividend Declaration & increase of Authorized Capital

The Board of Directors has recommended 150% stock dividend for the year ended on December 31, 2018. The Board has also decided to increase Authorized Capital from Tk. 400.00 crore to Tk. 500.00 crore and accordingly, amendments of the Memorandum and Articles of Association of the Company subject to approval of Bangladesh Bank & shareholders in the EGM. Date of EGM & AGM: 29.04.2019, Time of EGM & AGM: 10:00 AM & 10:30 AM respectively, (cont.)

### DUTCHBANGL: Dividend Declaration & increase of Authorized Capital

(Continuation news of DUTCHBANGL): Venue: The Ball Room of Pan Pacific Sonargaon Hotel, Dhaka. Record date for EGM & AGM: 07.04.2019. The Company has also reported consolidated EPS of Tk. 21.01, consolidated NAV per share of Tk. 115.43 and consolidated NOCFPS of Tk. 25.34 for the year ended on December 31, 2018 as against Tk. 12.28, Tk. 97.41 and Tk. 58.66 respectively for the same period of the previous year. (end)

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	57.3	0.7%	42.4	76.9
Gold (\$/Ounce)	1306.5	0.7%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.4	94.8	110.4	1.2	59.3

\*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

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

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