

BASL Daily Market Commentary

Thursday, August 16, 2018

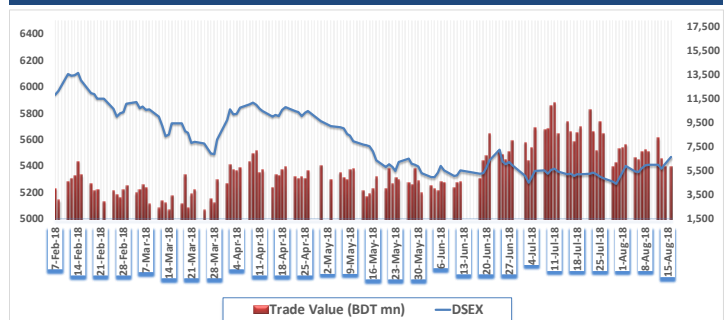
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Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index advanced by 59.3 points or 1.1% and closed at 5467.7 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green closing to 1915.3 and 1246.9 respectively. Turnover stood at BDT 5808 million (USD 70.0 million), about 0.10% higher than the previous trading session's value. Most of the sectors witnessed bullish performance today. Paper & Printing sector (+4.5%) was the highest gainer, followed by Jute (+3.8%) and General Insurance (+3.6%), whereas Textiles (-1.2%) was the highest loser, followed by Tannery (-0.4%) and Food & Allied (-0.4%). BBSCABLES (-2.0%) was the highest traded share with a turnover of BDT 263.1 million followed by IFADAUTOS (-2.0%) and BPML (+4.8%) respectively. Banks sector has highest turnover of 18.0% in the market. SAMATALETH (+10.0%) was the today's top gainer while NLI1STMF (-9.6%) was the top loser today.

Last Six Months Market Movement



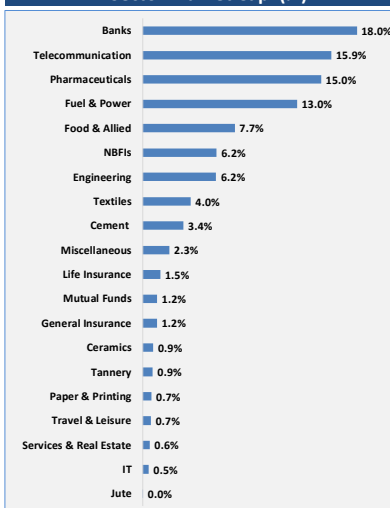
Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5467.7	5408.5	59.3	1.1%	-12.4%
DSES	1246.9	1242.6	4.3	0.3%	-10.3%
DS30	1915.3	1901.4	13.9	0.7%	-16.1%
Total Scripts					
	Advanced	Declined	Unchanged		
	330	212	91	37	
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	15.30	15.16	Market RSI (14)	57.94	56.87
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap					
Mn BDT	3,874,243	3,842,102	32,141	0.84%	
Mn USD	46,678	46,290	387		
Turnover					
Mn BDT	5,808	5,802	6	0.10%	
Mn USD	70.0	69.9	0.1		
Volume					
Mn Shares	176.1	172.2	3.8	2%	

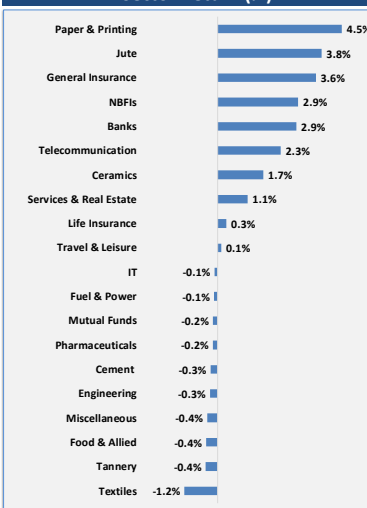
Sector Review

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	867.5	16.3%	55.4%	590,539	18.0%	2.9%	10.2
Cement	7	56.4	1.1%	-31.2%	112,711	3.4%	-0.3%	36.2
Ceramics	5	80.5	1.5%	21.8%	29,377	0.9%	1.7%	32.1
Engineering	35	959.0	18.0%	-9.0%	202,820	6.2%	-0.3%	18.7
Food & Allied	18	162.9	3.1%	-7.5%	254,223	7.7%	-0.4%	18.3
Fuel & Power	18	271.9	5.1%	-16.7%	426,429	13.0%	-0.1%	14.2
General Insurance	35	171.8	3.2%	21.9%	39,597	1.2%	3.6%	10.8
IT	8	125.1	2.3%	-14.9%	17,242	0.5%	-0.1%	20.2
Jute	3	33.3	0.6%	232.8%	1,559	0.0%	3.8%	314.6
Life Insurance	12	45.6	0.9%	-40.1%	48,849	1.5%	0.3%	n/m
Miscellaneous	12	186.6	3.5%	-34.8%	74,020	2.3%	-0.4%	20.1
Mutual Funds	36	77.3	1.4%	70.4%	40,095	1.2%	-0.2%	11.4
NBFIs	23	535.7	10.0%	171.2%	204,181	6.2%	2.9%	17.5
Paper & Printing	2	161.2	3.0%	32.8%	24,350	0.7%	4.5%	48.2
Pharmaceuticals	28	442.6	8.3%	4.2%	492,878	15.0%	-0.2%	17.6
Services & Real Estate	4	43.0	0.8%	120.2%	19,846	0.6%	1.1%	16.2
Tannery	6	139.6	2.6%	-29.7%	28,117	0.9%	-0.4%	16.8
Telecommunication	2	62.4	1.2%	-1.7%	520,990	15.9%	2.3%	15.1
Textiles	48	868.3	16.3%	-30.2%	132,552	4.0%	-1.2%	20.4
Travel & Leisure	4	41.0	0.8%	-26.0%	22,866	0.7%	0.1%	30.4

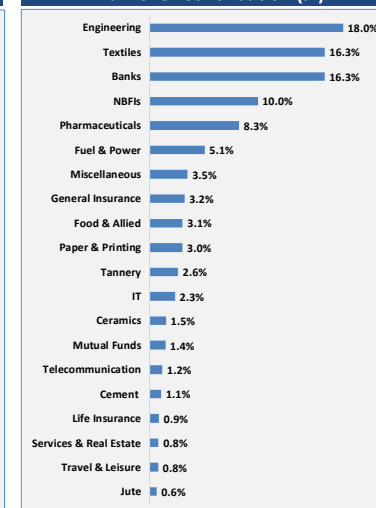
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



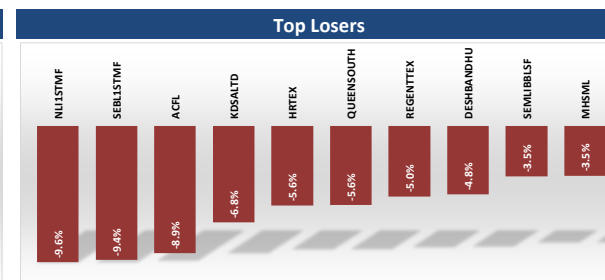
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
BBSCABLES	119.9	-2.0%	263.1	4.9%
IFDAUTOS	123.3	-2.0%	180.2	3.4%
BPML	125.9	4.8%	153.1	2.9%
LANKABAFIN	28	4.1%	147.1	2.8%
ACTIVEFINE	38.2	2.4%	145.7	2.7%
DHAKABANK	16.4	5.8%	136.1	2.6%
BRACBANK	75.8	2.4%	119.4	2.2%
SHEPHERD	33.2	-2.6%	105.2	2.0%
ACFL	57	-8.9%	96.0	1.8%
SQRPHARMA	273	-0.4%	91.1	1.7%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	375	2.3%	506,363	15.4%
SQRPHARMA	273	-0.4%	201,308	6.1%
BATBC	3255.8	-0.6%	195,348	5.9%
UPGDCL	331.3	-1.3%	132,268	4.0%
ICB	138.6	2.0%	92,093	2.8%
RENATA	1221.4	-0.8%	85,536	2.6%
BRACBANK	75.8	2.4%	81,296	2.5%
LHBL	53	0.2%	61,553	1.9%
SUMITPOWER	38.2	0.5%	40,793	1.2%
ISLAMIBANK	25.1	2.4%	40,411	1.2%

Upcoming Record Date & AGM date for Dividends/Right Offerings			
Scrip	Declaration	Record Date	AGM Date
MEGHNALIFE	20% C	19.08.2018	27.09.2018
NATLIFEINS	20% C & 15% S	20.08.2018	26.09.2018
PRAGATILIF	15% C & 10% S	27.08.2018	27.09.2018
SUNLIFEINS	2% S	28.08.2018	19.09.2018
UPGDCL	90% C 20% S	06.09.2018	30.10.2018
SANDHANINS	20% S	13.09.2018	30.09.2018

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

TRUSTB1MF: Dividend Declaration

The Trustee Board of the fund has approved 2% cash dividend and Re-Investment Units (RIU) of 8% for the year ended on June 30, 2018 to be issued at a valuation based on last published NAV per unit at market price before Record date. Record date: 13.09.2018. (cont.)

SANDHANINS: Dividend Declaration

The Board of Directors has recommended 20% stock dividend for the year ended on December 31, 2017. Date of AGM: 30.09.2018, Time: 11:30 AM, Venue: MH Samorita Hospital & Medical College Auditorium, 117 Tejgaon, Love Road, Dhaka-1208. Record Date: 13.09.2018. (cont.)

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	64.9	-0.2%	45.6	75.3
Gold (\$/Ounce)	1186.8	0.2%	1180.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
84.3	95.9	107.1	1.2	61.3

*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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