

BASL Daily Market Commentary

Wednesday, November 17, 2021

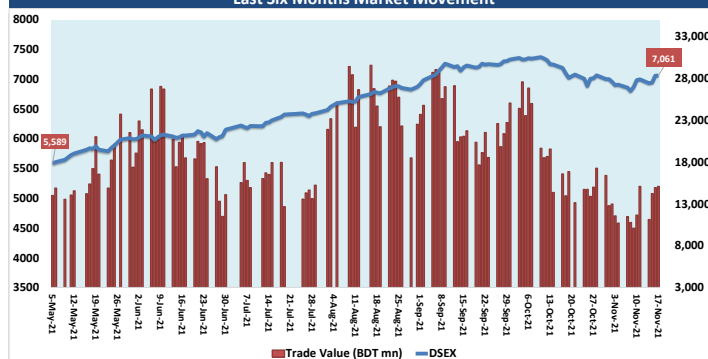
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Today's Market Snippet

The DSE broad Index- DSEX closed in slight green today. The benchmark index advanced by 4.2 points or 0.1% and closed at 7060.8 points today. The blue-chip index DS30 has closed in red by 8 or 0.3% to 2683.3 and the shariah based index DSES declined by 0.7 or 0.0% to 1484.1 respectively. Turnover stood at BDT million 15,070 (USD 175.6 million), about 1.02% higher than that of the previous trading session's value. General Insurance (+4.8%), Life Insurance (+4.4%) and Tannery Sector (+3.3%) were the top gaining sector whereas Jute (-1.1%), Ceramics (-1.1%) and Miscellaneous (-1.0%) were the top three losing sectors respectively. Bank Sector generated highest turnover position of 24.6% in the whole market. IFIC, BEXIMCO and DELTALIFE were the most active stocks in the market. EIL, INDEXAGRO and JANATAINS were the today's top three gainers while IFICLISLMF1, GENNEXT and AGNISYSL were the top three losers today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	7060.8	7056.6	4.2	0.1%	30.6%
DS30	2683.3	2691.3	-8.0	-0.3%	37.0%
DSES	1484.1	1484.8	-0.7	0.0%	19.5%

Total Scripts	Advanced	Declined	Unchanged	Not Traded
381	152	177	37	15

Market Indicators	Today	Last day	Today	Last day
Market PE	15.86	15.86	Market RSI (14)	53.52
				53.24

Market Statistics	Today	Last day	Change	Change (%)
Market Cap	Mn BDT	5,592,664	5,531,565	61,099
	Mn USD	65,183	64,470	712
Turnover	Mn BDT	15,070	14,919	152
	Mn USD	175.6	173.9	1.8

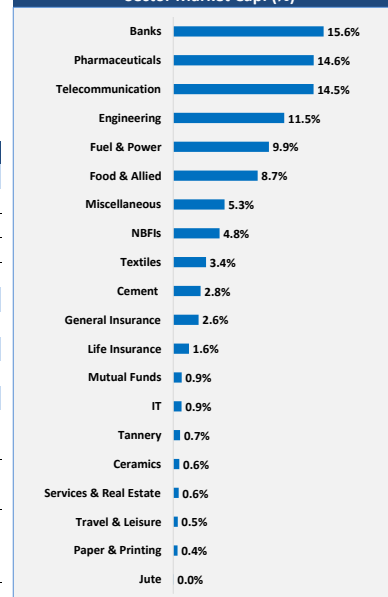
Turnover Composition	Mn BDT	Top 20 Cos.	Top 15 Cos.	Top 10 Cos.	Top 5 Cos.
		%	8,356	7,389	6,131
		55.4%	49.0%	40.7%	28.0%

Volume	Mn Shares	0.2	0.2	0.0	4%
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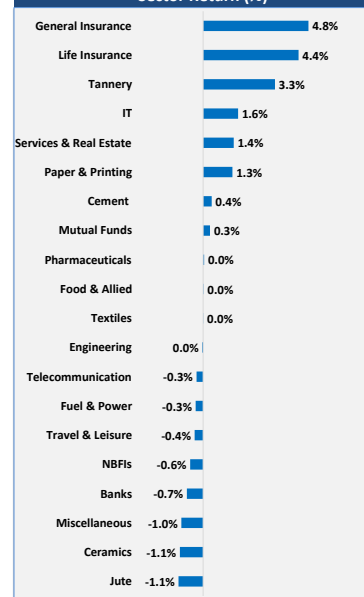
Sector Review

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	31	3598.8	24.6%	-13.6%	772,476	15.6%	-0.7%	8.3
Cement	7	289.7	2.0%	-17.8%	140,477	2.8%	0.4%	21.5
Ceramics	5	65.5	0.4%	-4.0%	31,210	0.6%	-1.1%	33.4
Engineering	42	805.5	5.5%	13.4%	570,307	11.5%	0.0%	23.0
Food & Allied	20	367.9	2.5%	22.7%	433,460	8.7%	0.0%	24.0
Fuel & Power	22	507.9	3.5%	-27.4%	491,458	9.9%	-0.3%	12.3
General Insurance	39	872.6	6.0%	191.5%	130,346	2.6%	4.8%	20.2
IT	11	558.4	3.8%	5.8%	42,809	0.9%	1.6%	28.4
Jute	3	6.6	0.0%	80.5%	1,946	0.0%	-1.1%	717.5
Life Insurance	12	788.2	5.4%	138.8%	80,896	1.6%	4.4%	n/m
Miscellaneous	14	1338.1	9.1%	-15.9%	263,589	5.3%	-1.0%	14.4
Mutual Funds	36	172.7	1.2%	38.2%	43,602	0.9%	0.3%	7.0
NBFIs	23	843.4	5.8%	-10.0%	237,850	4.8%	-0.6%	36.0
Paper & Printing	6	123.0	0.8%	131.2%	22,175	0.4%	1.3%	28.9
Pharmaceuticals	31	1911.0	13.0%	-13.2%	721,754	14.6%	0.0%	16.9
Services & Real Estate	4	254.7	1.7%	28.1%	27,949	0.6%	1.4%	21.6
Tannery	6	547.3	3.7%	149.1%	35,197	0.7%	3.3%	38.4
Telecommunication	3	83.2	0.6%	-23.4%	720,832	14.5%	-0.3%	18.5
Textiles	58	1459.3	10.0%	-8.2%	168,314	3.4%	0.0%	24.8
Travel & Leisure	4	53.4	0.4%	-3.9%	23,281	0.5%	-0.4%	478.5

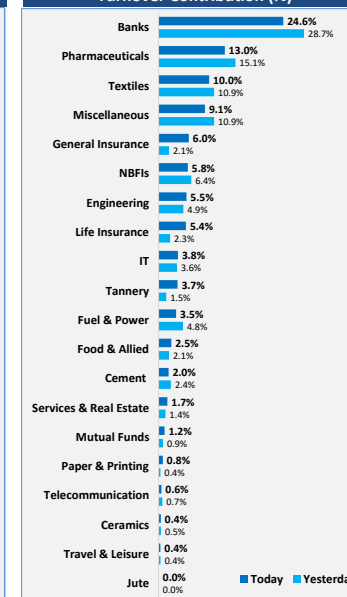
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



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
IFIC	21	0.0%	1204.0	8.2%	EIL	35.5	9.9%	21.82	IFILSLMF1	6.3	-6.0%	7.16
BEXIMCO	173.5	-1.6%	1159.3	7.9%	INDEXAGRO	121	9.8%	19.77	GENNEXT	5.3	-5.4%	n/a
DELTALIFE	221.5	8.7%	657.2	4.5%	JANATAINS	46.4	9.7%	28.29	AGNISYSL	20.5	-5.1%	17.08
ORIONPHARM	106.8	0.8%	621.2	4.2%	MERCINS	50.5	9.5%	33.82	ANLIMAYARN	37.4	-4.8%	n/a
NRBCBANK	37.8	0.8%	571.6	3.9%	GLOBALINS	48.7	9.4%	20.99	BRACBANK	57.5	-4.3%	15.03
FORTUNE	111	7.2%	542.7	3.7%	CITYGENINS	44.2	9.1%	25.9	SAVAREFR	181.9	-4.3%	n/a
GENEXIL	176.6	4.9%	462.2	3.2%	HFL	32.8	9.0%	273.33	KPPL	9.1	-4.2%	n/a
BRACBANK	57.5	-4.3%	368.5	2.5%	DELTALIFE	221.5	8.7%	-	SALVOCHEM	57.6	-4.2%	169.41
MERCANBANK	18.9	-1.0%	274.0	1.9%	BIFC	7.6	8.6%	n/a	AMANFEED	50.7	-4.2%	13.63
KTL	38	-3.8%	270.0	1.8%	PHENIXINS	58.5	8.5%	21.3	STYLECRAFT	104.1	-4.1%	n/a

Market Leaders Composition					Upcoming Record Date & AGM date for Dividends/Right Offerings				Performances of World Stock Indices				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)	Scrip	Declaration	Record Date	AGM Date	Indices	Country	Index Value	Change	Change (%)
GP	360.5	-0.3%	486,783	9.8%	MJLBD	55%C	17.11.2021	15.12.2021	DJIA	USA	24,682	-45	-0.2%
WALTONHIL	1160.5	-0.1%	351,548	7.1%	LOVELLO	11%C	17.11.2021	28.12.2021	FTSE 100	UK	7,039	-22	-0.3%
BATBC	618.5	-0.1%	333,990	6.7%	LRBDL	10%C	18.11.2021	27.12.2021	SENSEX	India	33,133	-3	0.0%
ROBI	38.9	-0.3%	203,756	4.1%	DESCO	10%C	18.11.2021	15.01.2022	Nikkei 225	Japan	21,592	211	1.0%
SQURPHARMA	226.2	-0.9%	200,515	4.0%	ANWARGALV	20%C & 10%B	18.11.2021	12.01.2022	STI	Singapore	3,507	-4	-0.1%
UPGDCL	272.9	1.2%	158,199	3.2%	MAKSONSPIN	11%C	21.11.2021	19.01.2022	SSE Comp.	China	3,266	-15	-0.5%
BEXIMCO	173.5	-1.6%	152,041	3.1%	KOHINOOR	35%C & 15%B	21.11.2021	12.12.2021	NASDAQ Co	USA	7,345	-19	-0.3%
RENATA	1317.2	0.2%	128,359	2.6%					NYSE Comp.	USA	12,684	20	0.2%
ICB	125.6	-1.6%	101,210	2.0%									
BXPHERMA	220.6	2.2%	98,412	2.0%									

Today's News Cut

BSRMSTEEL: Buy Declaration of a Corporate Director

H. Akberali & Co. Limited, one of the Corporate Directors of the Company, has expressed its intention to buy 7,50,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days, as per Rule-4 of the BSEC (Substantial Acquisition of shares and Takeovers), Rules, 2018.

SONALIANSH: Dividend Declaration

The Board of Directors has recommended 10% cash dividend for the year ended on June 30, 2021. Date of AGM: 22.12.2021, Time: 11:30 AM, Venue: 193, Fakirapool, Dhaka- 1000. Record Date: 07.12.2021. The Company has also reported EPS of Tk. 1.13, NAV per share of Tk. 225.65 and NOCFPS of Tk. (12.86) for the year ended on June 30, 2021 as against Tk. 0.62, Tk. 225.53 and Tk. 4.69 respectively for the same period of the previous year.

*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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Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)		0.0%	0.0	0.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
85.8	97.1	115.2	1.2	68.3