

BASL Daily Market Commentary

Monday, November 18, 2019

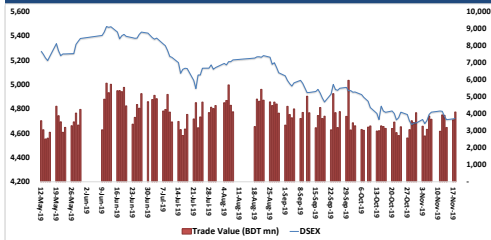
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Today's Market View

The DSE broad Index- DSEX closed in slight green today. The benchmark index advanced by 4.6 points or 0.1% and closed at 4720.0 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1652.2 and 1084.7 respectively. Turnover stood at BDT million 4,096 (USD 48.4 million), about 12.63% higher than the previous trading session's value. Most of the sectors witnessed bullish performance today. Jute Sector (+2.2%) was the highest gainer followed by General Insurance Sector (+2.0%) whereas Servie & real Estate Sector (-1.9%) was the highest loser followed by Paper & Printing Sector (-0.9%). NLTUBES (-4.3%) was the highest traded share with a turnover of BDT 174.3 million followed by WATACHEM (+1.1%) and ASIANS (+9.6%) respectively. General Insurance sector lead highest turnover position of 22.9% in the whole market. BDAUTOCA(+9.9%) was the today's top gainer while PREMIERCER (-8.6%) was the top loser today.

Last Six Months Market Movement



Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	4722.0	4717.4	4.6	0.1%	-24.4%
DSES	1084.7	1083.7	1.0	0.1%	-22.0%
DS30	1652.2	1642.4	9.8	0.6%	-27.6%

Total Scrips	Advanced	Declined	Unchanged	Not Traded
356	156	135	50	14

Market Indicators	Today	Last day	Today	Last day
Market PE	13.48	13.58	Market RSI (14)	42.87
				42.15

Market Statistics	Today	Last day	Change	Change (%)
Mn BDT	3,557,517	3,551,805	5,712	0.16%
Mn USD	42,011	41,944	67	

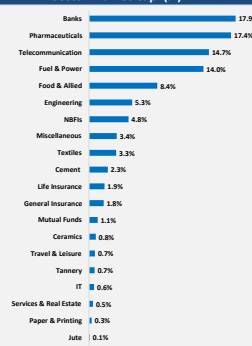
Turnover	Mn BDT	Mn USD	Change	Change (%)
	4,096	3,637	459	12.63%
	48.4	42.9	5.4	

Volume	Mn Shares	Change	Change (%)
	133.4	125.8	6%

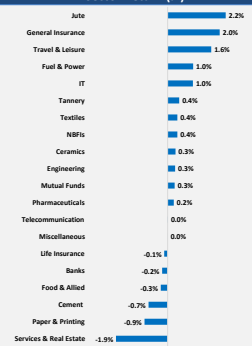
Sector Review

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	30	361.0	8.9%	30.3%	534,837	17.9%	-0.2%	8.1
Cement	7	35.9	0.9%	25.9%	68,599	2.3%	-0.7%	26.9
Ceramics	5	77.8	1.9%	-45.6%	24,686	0.8%	0.3%	29.0
Engineering	39	620.2	15.3%	15.3%	157,496	5.3%	0.3%	15.8
Food & Allied	17	146.3	3.6%	-14.5%	249,149	8.4%	-0.3%	22.2
Fuel & Power	19	196.9	4.8%	-11.3%	417,509	14.0%	1.0%	11.1
General Insurance	35	930.9	22.9%	60.1%	53,236	1.8%	2.0%	14.9
IT	9	56.6	1.4%	-32.1%	18,347	0.6%	1.0%	18.9
Jute	3	25.5	0.6%	117.6%	2,865	0.1%	2.2%	44.7
Life Insurance	12	90.4	2.2%	-12.2%	56,426	1.9%	-0.1%	n/m
Miscellaneous	13	160.6	4.0%	-3.1%	100,980	3.4%	0.0%	20.2
Mutual Funds	37	99.3	2.4%	0.6%	31,429	1.1%	0.3%	41.9
NBFs	23	136.9	3.4%	-17.0%	144,159	4.8%	0.4%	22.7
Paper & Printing	3	9.5	0.2%	-19.0%	9,586	0.3%	-0.9%	32.8
Pharmaceuticals	32	513.0	12.6%	87.7%	518,282	17.4%	0.2%	16.8
Services & Real Estate	4	10.2	0.3%	-30.9%	14,231	0.5%	-1.9%	9.6
Tannery	6	138.0	3.4%	24.6%	20,214	0.7%	0.4%	20.9
Telecommunication	2	128.1	3.2%	-5.7%	437,391	14.7%	0.0%	12.7
Textiles	55	281.3	6.9%	-8.4%	99,050	3.3%	0.4%	16.4
Travel & Leisure	5	42.2	1.0%	-14.6%	21,539	0.7%	1.6%	28.7

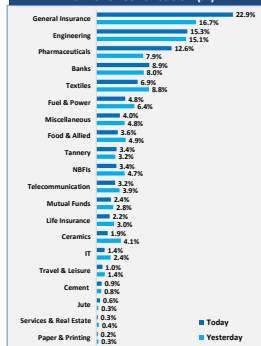
Sector Market Cap. (%)



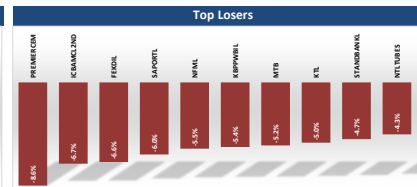
Sector Return (%)



Turnover Contribution (%)



Most Active Stocks				
Script	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
NLTUBES	155.4	-4.3%	174.3	4.3%
WATACHEM	609.3	1.1%	139.0	3.4%
ASIAINS	27.3	9.6%	121.2	3.0%
SONARBAINS	48.3	-3.4%	91.4	2.3%
DUTCHBANGL	72	-2.0%	90.0	2.2%
STYLERRAFT	716.7	5.5%	79.2	2.0%
NGOLYMAR	72.7	0.4%	71.7	1.8%
FORTUNE	30.8	-1.0%	69.3	1.7%
MONNOCERA	155.1	1.2%	68.7	1.7%
SQRPHARMA	238.6	0.1%	68.2	1.7%



Market Leaders Composition				
Script	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	310.5	0.1%	419,268	14.1%
BATBC	1092.6	-0.1%	196,668	6.6%
SQRPHARMA	238.6	0.1%	188,257	6.3%
UPGDCL	267.3	2.8%	140,866	4.7%
RENATA	1308.7	0.0%	105,397	3.5%
BRACBANK	59.7	1.4%	73,633	2.5%
BERGERPBL	1443.7	0.2%	66,956	2.2%
ICB	85.5	0.0%	59,651	2.0%
MARICO	1711.3	0.1%	53,906	1.8%
SUMITPOWER	37.4	0.5%	39,939	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Script	Declaration	Record Date	AGM Date	
STANCERAM	5% cash	18.11.2019	28.12.2019	
MICEMENT	10% cash	18.11.2019	19.12.2019	
MONNOCERA	10% cash, 10% stock	19.11.2019	19.12.2019	
AZZPIPES	7% cash	19.11.2019	11.12.2019	

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	31,133	-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

ACMELAB: Buy Declaration of a Sponsor Director

Mr. Mizanur Rahman Sinha, one of the Sponsors Directors of the Company, has expressed his intention to buy 1,50,000 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

GBBPOWER: Solve of the Litigation between the Company & PGCL and its impact

With reference to their earlier news disseminated by DSE on 04.02.2018 regarding Dispose of the Litigation between the Company & PGCL and its impact, the Company has further informed that the Claim as per the order of the Arbitral Tribunal No. 28.01.0000.016.31.24.13.226 dated January 10, 2018, which was duly approved by the Bangladesh Energy Regulatory Commission (BERC) on HHV by PGCL amounting to Tk. 14,70,52,080.00 has been completely paid by GBB Power Limited on September 23, 2019 as per PGCL confirmed office letter No. 28.18.0000.084.34.008.19.32, dated: November 07, 2019. Hence, the Company is anticipating that, effective immediately there will be no more negative impact in their Cash flows.

*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				
Commodity	Latest	Change (%)	S2W-Low	S2W-High
Oil (\$/barrel)	57.9	0.4%	42.4	66.6
Gold (\$/Ounce)	1468.7	0.0%	1211.0	1566.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
84.7	93.6	109.3	1.2	57.7