

# BASL Daily Market Commentary

Sunday, April 21, 2019

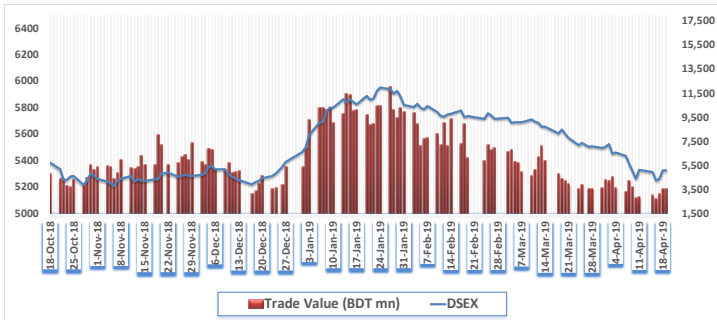
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
info@basl-bd.com, Tel- 9515826-2, www.basl-bd.com



## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index increased by 2.3 points or 0.0% and closed at 5323.7 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green, closing to 1892.9 and 1231.2 respectively. Turnover stood at BDT million 3518 (USD 42.4 million), about 0.08% lower than the previous trading session's value. Most of the sectors witnessed bullish performance today. IT Sector (+1.8%) was the highest gainer followed by Telecommunication Sector (+1.5%) and Tannery Sector (+1.5%) respectively whereas General Insurance Sector (-2.2%) was the highest loser followed by Jute (-2.1%) and Paper & Printings (-1.4%) respectively. FORTUNE (+5.6%) was the highest traded share with a turnover of BDT 285.9 million followed by UPGDCL (+2.2%) and MONNOCERA (+3.9%) respectively. Banks sector has highest turnover of 16.8% in the market. STANCERAM (+8.8%) was the today's top gainer while MERCINS (-6.9%) was the top loser today

## Last Six Months Market Movement



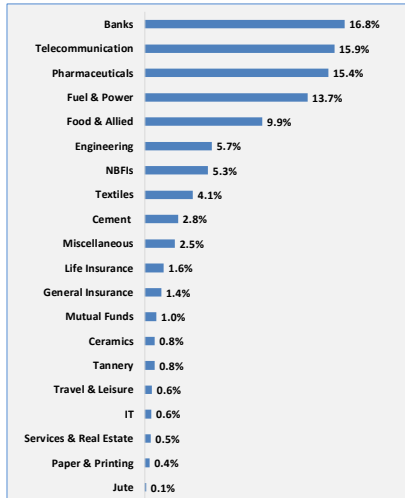
## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5323.7	5321.4	2.3	0.0%	-14.7%
DSES	1231.2	1227.6	3.6	0.3%	-11.5%
DS30	1892.9	1897.6	-4.6	-0.2%	-17.1%
Total Scripts					
	330	143	142	60	
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	13.41	13.36	Market RSI (14)	35.52	35.19
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,963,828	3,951,632	12,196	0.31%
	Mn USD	47,757	47,610	147	
Turnover	Mn BDT	3,518	3,521	(3)	-0.08%
	Mn USD	42.4	42.4	(0.0)	
Volume	Mn Shares	84.3	86.0	(1.8)	-2%

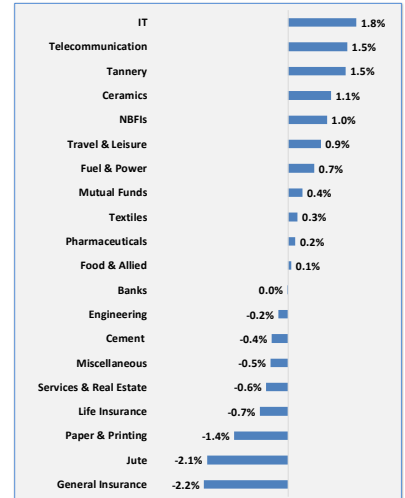
## Sector Review

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	301.3	8.8%	17.9%	562,236	16.8%	0.0%	8.6
Cement	7	32.0	0.9%	-8.3%	93,536	2.8%	-0.4%	32.7
Ceramics	5	258.0	7.5%	35.3%	28,043	0.8%	1.1%	17.4
Engineering	36	519.0	15.1%	11.7%	189,045	5.7%	-0.2%	16.3
Food & Allied	17	124.8	3.6%	21.1%	330,513	9.9%	0.1%	10.1
Fuel & Power	19	377.6	11.0%	-4.0%	457,673	13.7%	0.7%	12.1
General Insurance	35	180.1	5.2%	-29.8%	46,617	1.4%	-2.2%	13.4
IT	8	145.8	4.2%	117.7%	18,980	0.6%	1.8%	18.6
Jute	3	13.6	0.4%	14.3%	3,967	0.1%	-2.1%	76.7
Life Insurance	12	18.1	0.5%	-23.4%	53,581	1.6%	-0.7%	n/m
Miscellaneous	13	147.1	4.3%	-31.8%	84,794	2.5%	-0.5%	24.9
Mutual Funds	37	8.1	0.2%	-28.7%	32,927	1.0%	0.4%	12.4
NBFIs	23	77.2	2.2%	-15.2%	178,142	5.3%	1.0%	20.5
Paper & Printing	3	18.6	0.5%	-43.8%	13,721	0.4%	-1.4%	29.9
Pharmaceuticals	31	293.5	8.5%	-14.0%	516,538	15.4%	0.2%	18.2
Services & Real Estate	4	21.9	0.6%	-0.5%	17,170	0.5%	-0.6%	15.7
Tannery	6	329.1	9.6%	88.4%	28,006	0.8%	1.5%	16.9
Telecommunication	2	218.8	6.4%	-3.2%	533,211	15.9%	1.5%	15.0
Textiles	53	335.5	9.8%	-4.7%	135,818	4.1%	0.3%	17.0
Travel & Leisure	4	16.2	0.5%	-40.3%	20,802	0.6%	0.9%	28.3

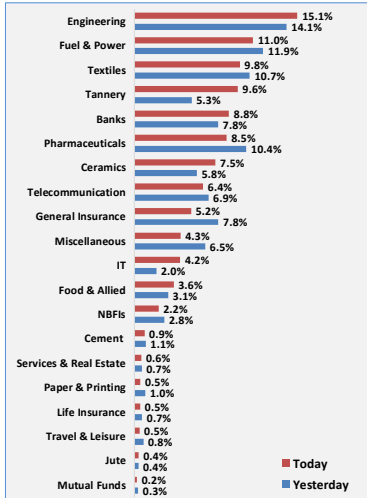
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



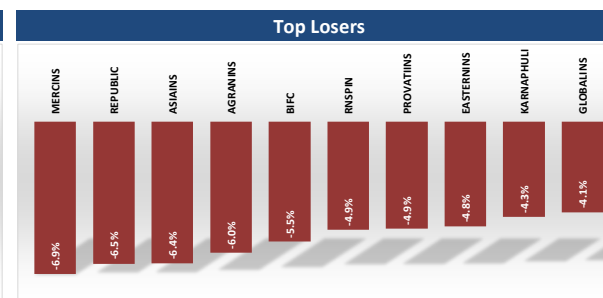
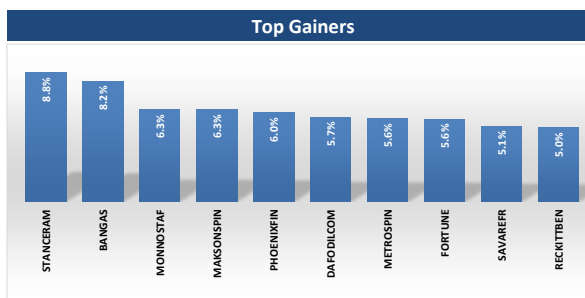
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
FORTUNE	37.8	5.6%	285.9	8.3%
UPGDCL	335.1	2.2%	218.7	6.4%
MONNOCERA	272.8	3.9%	207.6	6.0%
BSCCL	171	2.0%	181.8	5.3%
NLTUBES	121.9	1.8%	113.0	3.3%
DAFODILCOM	53.4	5.7%	88.6	2.6%
ECABLES	337.5	-1.6%	69.5	2.0%
PREMIERBAN	13	0.8%	63.2	1.8%
MONNOSTAF	1354.9	6.3%	58.2	1.7%
ESQUIRENT	43.3	4.6%	58.1	1.7%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	374	1.5%	505,012	15.1%
BATBC	1477.2	0.0%	265,896	7.9%
SQURPHARMA	260.2	0.5%	205,300	6.1%
UPGDCL	335.1	2.2%	160,542	4.8%
RENATA	1169.9	0.1%	94,219	2.8%
ICB	111.9	2.5%	78,070	2.3%
BRACBANK	62.8	-3.7%	67,353	2.0%
LHBL	40.4	-0.2%	46,919	1.4%
OLYMPIC	219.6	0.0%	43,907	1.3%
MARICO	1375.7	0.2%	43,335	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
FIRSTSBANK	10%\$	22.04.2019	20.05.2019	
PREMIERBAN	15.5%\$	23.04.2019	12.05.2019	
BDFINANCE	10%\$	06.05.2019	06.05.2019	
CITYBANK	6%\$C, 5%\$	12.05.2019	26.06.2019	

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

### BNICL: Dividend Declaration

The Board of Directors has recommended 12% cash dividend for the year ended on December 31, 2018. Date of AGM: 26.06.2019, Time: 10:00 AM, Venue: Spectra Convention Center Limited, House: 19, Road: 7, Gulshan: 1, Dhaka: 1212. Record Date: 16.05.2019. The Company has also reported EPS of Tk. 2.00, NAV per share of Tk. 18.02 and NOCFPS of Tk. 1.27 for the year ended on December 31, 2018 as against Tk. 1.64, Tk. 17.05 and Tk. 2.86 respectively for the same period of the previous year.

### ANWARGALV: Buy Declaration of a Sponsor Director

Mr. Hossain Khaled, one of the Sponsors Directors of the Company, has expressed his intention to buy 23,000 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within April 30, 2019.

Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	64.0	0.4%	42.4	76.9
Gold (\$/Ounce)	1276.0	0.0%	1167.0	1350.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.3	95.0	109.8	1.2	60.5

\*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

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