

BASL Daily Market Commentary

Thursday, May 23, 2019

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

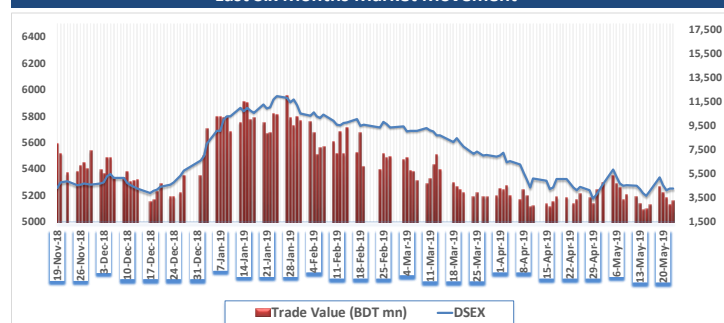


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Today's Market View

The DSE broad Index- DSEX closed in red today. The benchmark index decreased by 0.3 points or 0.0% and closed at 5250.6 points today. Today the blue-chip index DS30 closed in green and closed at 1832.8 and the shariah based index DSES closed in red and closed at 1192.9. Turnover stood at BDT 3195 million (USD 38.5 million), about 9.96 % higher than the previous trading session's value. Most of the sectors witnessed bearish performance today. Life Insurance sector (+0.9%) was the highest gainer, followed by Mutual Funds (+0.8%) and General insurance Sector (+0.6%) respectively, whereas Jute sector (-2.6%) was the highest loser, followed by Telecommunication sector (-1.4%) and Paper & Printing Sector (-1.1%). PRIMEFIN (+3.8%) was the highest traded share with a turnover of BDT 221.3 million followed by BRACBANK (+3.8%) and RUNNERAUTO (-8.6 %) respectively. Banks sector has highest turnover of 17.4% in the market. PREMIERLEA (+9.5%) was the today's top gainer while RUNNERAUTO (-8.6%) was the top loser today.

Last Six Months Market Movement



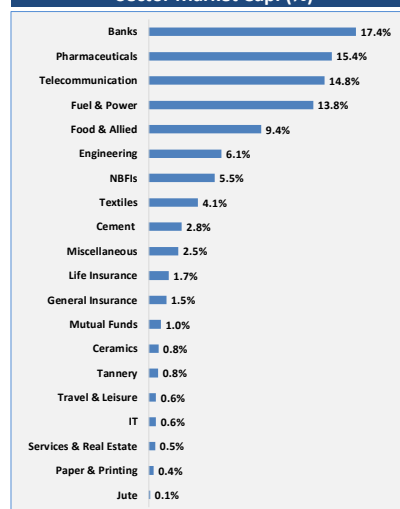
Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5250.6	5250.9	-0.3	0.0%	-15.9%
DSES	1192.9	1196.5	-3.6	-0.3%	-14.2%
DS30	1832.8	1830.3	2.5	0.1%	-19.7%
Total Scripts					
	330	129			47
Market Indicators					
	Today	Last day	Today	Last day	
Market PE	13.73	13.77	Market RSI (14)	45.11	45.11
Market Statistics					
	Today	Last day	Change	Change (%)	
Market Cap					
Mn BDT	3,858,628	3,862,943	(4,316)		
Mn USD	46,489	46,541	(52)		-0.11%
Turnover					
Mn BDT	3,195	2,905	289		9.96%
Mn USD	38.5	35.0	3.5		
Volume					
Mn Shares	117.0	86.1	30.9		36%

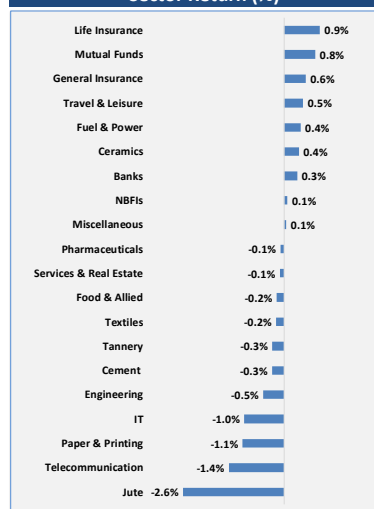
Sector Review

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	480.4	16.1%	14.3%	564,746	17.4%	0.3%	9.6
Cement	7	20.4	0.7%	10.1%	89,952	2.8%	-0.3%	27.3
Ceramics	5	93.9	3.2%	32.5%	26,674	0.8%	0.4%	22.3
Engineering	36	458.9	15.4%	10.2%	197,927	6.1%	-0.5%	17.2
Food & Allied	17	68.6	2.3%	-32.3%	305,783	9.4%	-0.2%	11.3
Fuel & Power	19	297.0	10.0%	-0.2%	448,565	13.8%	0.4%	12.3
General Insurance	35	238.8	8.0%	-12.4%	47,762	1.5%	0.6%	12.6
IT	8	47.5	1.6%	-22.7%	19,728	0.6%	-1.0%	20.2
Jute	3	4.7	0.2%	-47.5%	3,772	0.1%	-2.6%	72.9
Life Insurance	12	84.5	2.8%	50.2%	54,507	1.7%	0.9%	n/m
Miscellaneous	13	135.7	4.6%	-35.1%	80,546	2.5%	0.1%	23.0
Mutual Funds	37	12.2	0.4%	-0.4%	33,446	1.0%	0.8%	11.9
NBFIs	23	398.7	13.4%	319.6%	179,951	5.5%	0.1%	19.3
Paper & Printing	3	9.8	0.3%	41.1%	13,546	0.4%	-1.1%	38.0
Pharmaceuticals	31	224.0	7.5%	-32.8%	499,264	15.4%	-0.1%	17.4
Services & Real Estate	4	9.4	0.3%	-14.3%	17,396	0.5%	-0.1%	16.9
Tannery	6	104.4	3.5%	-47.9%	25,421	0.8%	-0.3%	32.9
Telecommunication	2	86.8	2.9%	58.3%	479,122	14.8%	-1.4%	13.2
Textiles	53	194.7	6.5%	-1.3%	134,094	4.1%	-0.2%	17.8
Travel & Leisure	4	6.1	0.2%	2.7%	20,232	0.6%	0.5%	24.2

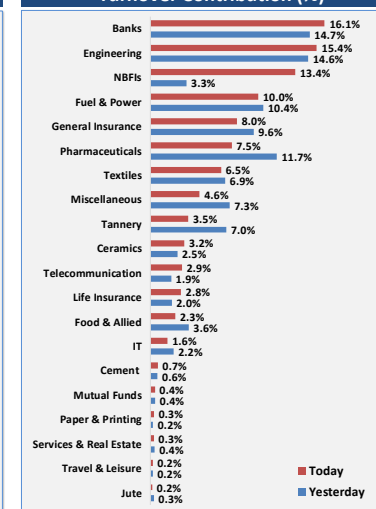
Sector Market Cap. (%)



Sector Return (%)



Turnover Contribution (%)



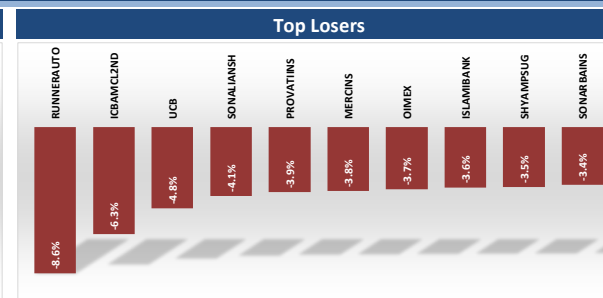
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
PRIMEFIN	11	3.8%	221.3	7.4%
BRACBANK	60.8	3.8%	144.3	4.8%
RUNNERAUTO	88.9	-8.6%	135.5	4.6%
UPGDCL	327.6	1.0%	106.9	3.6%
ECABLES	353.7	2.6%	88.8	3.0%
MONNOCERA	235.6	2.1%	83.4	2.8%
FORTUNE	37.8	-2.3%	74.6	2.5%
GP	337.9	-1.4%	61.1	2.1%
PRIMELIFE	51.1	-1.0%	56.1	1.9%
DOREENPWR	81.6	-0.7%	54.7	1.8%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	337.9	-1.4%	456,266	14.1%
BATBC	1334.9	0.0%	240,282	7.4%
SQURPHARMA	248.3	-0.2%	195,911	6.0%
UPGDCL	327.6	1.0%	156,949	4.8%
RENATA	1164	0.5%	93,744	2.9%
ICB	112.4	-0.8%	78,419	2.4%
BRACBANK	60.8	3.8%	65,208	2.0%
LHBL	39.5	-0.8%	45,874	1.4%
OLYMPIC	223.9	-1.1%	44,766	1.4%
MARICO	1396.9	0.0%	44,002	1.4%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
PHOENIXFIN	15%\$	23.05.2019	20.06.2019	
RUPALIINS	10%\$	23.05.2019	03.07.2019	
IFIC	10%\$	23.05.2019	29.06.2019	
REPUBLIC	10%\$	23.05.2019	27.06.2019	
RUPALIBANK	10%\$	23.05.2019	17.06.2019	
SONARBAINS	6%\$, 6%\$	27.05.2019	27.07.2017	
SOUTHEASTB	10%\$	23.05.2019	23.06.201	
STANDBANKL	10%\$	30.05.2019	20.06.2019	
MERCANBANK	15%\$	30.05.2019	20.06.2019	
MTB	11%\$	03.06.2019	30.06.2019	
PURABIGEN	12%\$	16.06.2019	18.07.2019	

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

OLYMPIC: Board decision to purchase Land

The Company has informed that the Board of Directors has decided to purchase total 12.83 Decimals land at total consideration of Tk. 42,98,000.00. Out of total 12.83 Decimals land, 08 decimals land with purchase consideration of Tk. 26,80,000.00 is situated in Mouza-Khaspara, Union- Kanchpur, P.S: Sonargaon, District: Narayanganj. 4.83 Decimals land with purchase consideration of Tk. 16,18,000.00 is situated in (cont.)

(Continuation news of OLYMPIC): Mouza-Khaspara, Union- Kanchpur, P.S: Sonargaon, District: Narayanganj. Besides the above stated purchase consideration, another Tk. 5,59,000.00 shall have to be spent as Registration Fees and other Miscellaneous Expenses for purchasing the above 12.83 decimals land. (end)

Commodity Prices				
Comodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	61.0	-0.7%	42.4	76.9
Gold (\$/Ounce)	1275.4	0.1%	1167.0	1350.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.8	94.3	106.8	1.2	58.2

*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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