

# BASL Daily Market Commentary

Sunday, August 26, 2018

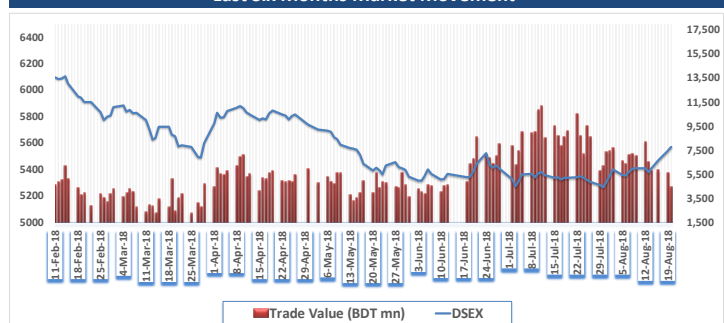
Hadi mansion (7th floor) 2, Dilkusha Commercial Area, Dhaka-1000  
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## Today's Market View

The DSE broad Index- DSEX closed in green today. The benchmark index advanced by 25.7 points or 0.5% and closed at 5596.9 points today. The blue-chip index DS30 and the shariah based index DSES both closed in green closing to 1961.8 and 1272.3 respectively. Turnover stood at BDT 4,202 million (USD 50.6 million), about 5.63% lower than the previous trading session's value. Most of the sectors witnessed bullish performance today. JUTE sector (+4.7%) was the highest gainer, followed by Miscellaneous (+3.4%) and Ceramics (+2.5%), whereas Life Insurance (-2.5%) was the highest loser, followed by Bank (-1.3%) and NBFi (-0.6%). ACTIVEFINE (+5.6%) was the highest traded share with a turnover of BDT 251.1 million followed by LANKABAFIN (+1.3%) and BBSCABLES (-0.3%) respectively. NBFi sector has highest turnover of 18.0% in the market. KAY&QUE (+10.0%) was the today's top gainer while SONARGAON (-7.7%) was the top loser today.

## Last Six Months Market Movement



## Market Summary

Index	Today	Last day	Change	Change (%)	YTD Change (%)
DSEX	5596.9	5571.2	25.7	0.5%	-10.4%
DSES	1272.3	1257.6	14.7	1.2%	-8.5%
DS30	1961.8	1948.2	13.6	0.7%	-14.1%

Total Scripts	Advanced	Declined	Unchanged
330	200	107	28

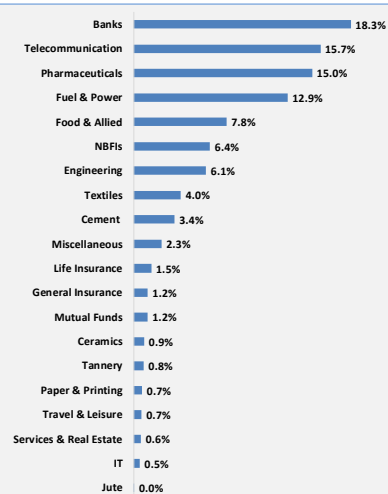
Market Indicators	Today	Last day	Today	Last day
Market PE	15.53	15.44	Market RSI (14)	74.34
				72.60

Market Statistics	Today	Last day	Change	Change (%)	
Market Cap	Mn BDT	3,940,353	3,921,407	18,946	0.48%
	Mn USD	47,474	47,246	228	
Turnover	Mn BDT	4,202	4,453	(251)	-5.63%
	Mn USD	50.6	53.7	(3.0)	
Volume	Mn Shares	126.6	155.0	(28.3)	-18%

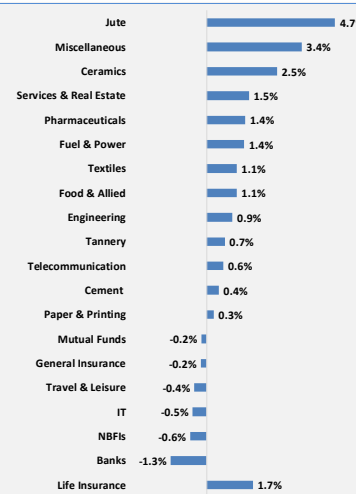
## Sector Review

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	708.6	17.2%	-42.4%	610,345	18.3%	-1.3%	10.6
Cement	7	43.5	1.1%	65.3%	114,746	3.4%	0.4%	36.8
Ceramics	5	49.0	1.2%	64.1%	29,082	0.9%	2.5%	31.8
Engineering	35	565.9	13.7%	18.4%	203,154	6.1%	0.9%	18.7
Food & Allied	18	99.6	2.4%	23.1%	260,692	7.8%	1.1%	18.7
Fuel & Power	18	289.8	7.0%	18.5%	432,798	12.9%	1.4%	14.4
General Insurance	35	74.9	1.8%	-10.8%	39,685	1.2%	-0.2%	10.8
IT	8	48.6	1.2%	-52.1%	17,074	0.5%	-0.5%	20.0
Jute	3	20.6	0.5%	16.1%	1,604	0.0%	4.7%	323.8
Life Insurance	12	48.1	1.2%	84.3%	49,545	1.5%	1.7%	n/m
Miscellaneous	12	190.8	4.6%	18.4%	78,119	2.3%	3.4%	21.2
Mutual Funds	36	27.6	0.7%	-37.8%	39,319	1.2%	-0.2%	9.2
NBFIs	23	741.9	18.0%	6.0%	214,388	6.4%	-0.6%	18.4
Paper & Printing	2	43.6	1.1%	-23.9%	23,592	0.7%	0.3%	46.7
Pharmaceuticals	28	504.9	12.2%	71.4%	501,827	15.0%	1.4%	18.0
Services & Real Estate	4	18.3	0.4%	7.3%	20,172	0.6%	1.5%	16.5
Tannery	6	42.0	1.0%	12.5%	28,367	0.8%	0.7%	17.0
Telecommunication	2	24.4	0.6%	-22.1%	524,520	15.7%	0.6%	15.2
Textiles	48	561.4	13.6%	-11.2%	132,460	4.0%	1.1%	20.4
Travel & Leisure	4	26.1	0.6%	-48.0%	22,447	0.7%	-0.4%	29.8

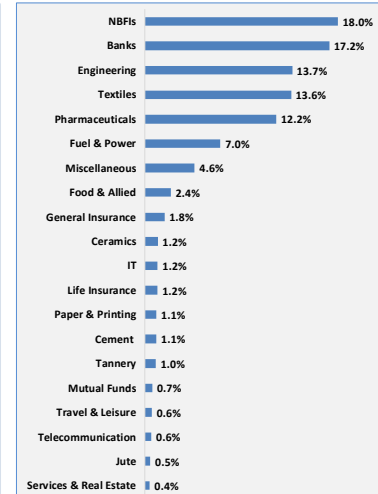
## Sector Market Cap. (%)



## Sector Return (%)



## Turnover Contribution (%)



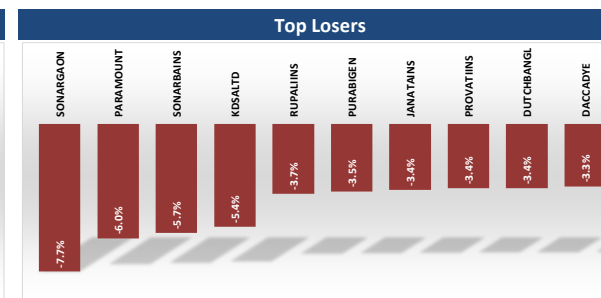
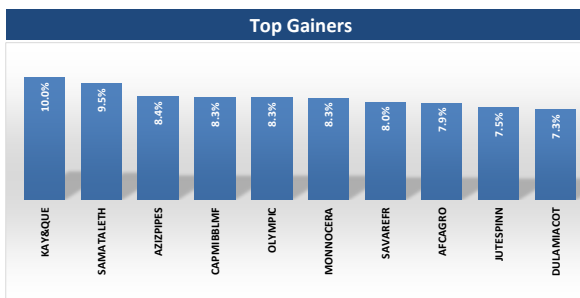
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Most Active Stocks				
Scrip	Price	Change (%)	Turnover (BDT mn)	Turnover As (%)
ACTIVEFINE	39.7	5.6%	251.1	6.1%
LANKABAFIN	30.4	1.3%	185.1	4.5%
BBSCABLES	117.3	-0.3%	148.5	3.6%
UPGDCL	338.9	2.4%	139.8	3.4%
NHFIL	59.9	6.2%	137.4	3.3%
SHEPHERD	34.8	1.5%	109.6	2.7%
ILFSL	17.3	1.2%	87.0	2.1%
CITYBANK	34.9	-2.2%	79.1	1.9%
KDSALTD	77.3	-5.4%	76.4	1.8%
IFADAUTOS	123	0.6%	68.2	1.7%



Market Leaders Composition				
Scrip	Price	Change (%)	Market Cap. (BDT mn)	Market Cap. As (%)
GP	377.7	0.6%	510,008	15.3%
SQURPHARMA	278.6	0.9%	205,437	6.1%
BATBC	3293.5	-0.4%	197,610	5.9%
UPGDCL	338.9	2.4%	135,302	4.0%
ICB	141.5	-1.7%	94,020	2.8%
RENATA	1226.1	-0.3%	85,865	2.6%
BRACBANK	76.7	-0.8%	82,261	2.5%
LHBL	54	0.6%	62,714	1.9%
OLYMPIC	216.2	8.3%	43,227	1.3%
ISLAMIBANK	26.7	0.0%	42,987	1.3%

Upcoming Record Date & AGM date for Dividends/Right Offerings				
Scrip	Declaration	Record Date	AGM Date	
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	
DSSL	5% C 20% S	13.09.2018	12.11.2018	

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

### KDSALTD: Dividend Declaration

The Board of Directors has recommended 10% cash and 5% stock dividend for the year ended on June 30, 2018. Date of AGM: 25.10.2018, Time: 11:00 AM, Venue: Chittagong Boat Club. Near Old Airport, Patenga, Chittagong. Record Date: 18.09.2018. The Company has also reported EPS of Tk. 2.21, NAV per share of Tk. 24.88 and NOCFPS of Tk. 3.08 for the year ended on June 30, 2018 as against Tk. 2.09 (restated), Tk. 24.80 and Tk. 2.81 respectively for the same period of the previous year.

### PHOENIXFIN: Sale Declaration of a Director

Mr. Mobarak Ali, one of the Directors of the Company, has expressed his intention to sell 10,60,000 shares out of his total holding of 50,80,148 shares of the Company at prevailing market price (In the Public Market) through Stock Exchanges (DSE & CSE) within next 30 working days.

Commodity Prices				
Commodity	Latest	Change (%)	52W-Low	52W-High
Oil (\$/barrel)	68.5	1.0%	45.6	75.3
Gold (\$/Ounce)	1212.3	1.5%	1167.0	1369.0

Exchange Rates				
USD	EURO	GBP	RUPEE	CAD
83.5	95.3	106.4	1.2	61.0

\*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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