

Today's Market Overview

Tuesday, September 15, 2015

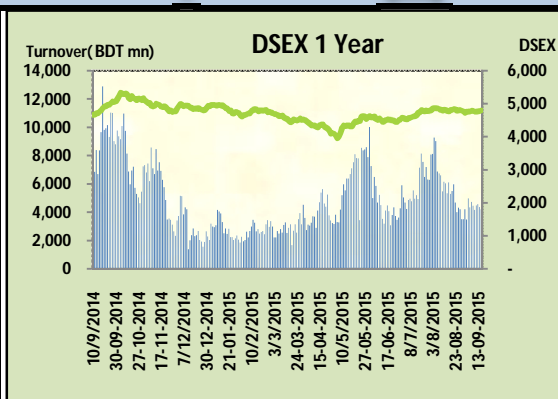


DSEX	4,801.81	0.33%	Issues Traded	Advanced	Declined	Unchanged
Turnover (BDT mn)	4,204.08	-3.80%		117	159	47

Huge optimism in initial hour faded out later for poor participation level and late hour sale domination. Market continued to gain for consecutive four trading sessions with a sluggish turnover. Market opened with a flying start but poor contribution in midsession tried to slow the pace but it managed to stay in green zone and crossed the 4800 mark after twelve trading sessions. Investors tried to shift their momentum from small cap stocks to some big cap stocks which actually kept the vibration but poor volume level kept the investors in puzzle. Other two indices DS30 & DSES the shariah based index both performed marginally positive. Most of the major and prominent sectors put marginally gaining performances except NBFI, Textile & insurances

The general gauge DSEX ended at 4801.81 with an advance of +0.3% which added 15.61 points to the broad DSEX. The Turnover declined slightly by -3.8% which was 166 Million BDT poorer than that of previous day and finally finished the mark at 4204.08 million BDT. A total of 117 issues advanced with 159 declined and 47 remained unchanged. Sectors that improved were: Bank (+0.6%) Cement (+0.9%) ceramics (+0.2%) Engineering (+1.6%) Telecom (+0.4%) Power (+0.6%) Miscellaneous (+1.0%) Food (+0.3%) Pharmaceuticals (+0.2%) Travel (+0.2%) Paper (+2.0%) & sectors that declined were: Insurance (-1.7%) NBFI (-0.6%) Service (-0.8%) Textile (-0.7%) Jute (-1.0%) IT (-0.2%)

BXPHARMA again topped in the Volume chart with a turnover of 18.95 BDT crore. POWERGRID ranked top gainer chart with a price hike of +9.8% and SONARGAON topped in the loser chart with a decline of -4.7% from its prevailing price. ISLAMIBANK led the way in the index mover chart while RENATA played the shatter part.



Index Scenario

	INDEX	Change	% Changes
DSEX	4801.81	15.61	0.3%
DSES	1180.42	4.95	0.4%
DS30	1837.66	12.73	0.7%

Market Highlights

DSEX 52 week H/L	5334/3960	Market P/E (LTM)	15.94
DSEX Week H/L	4802/4758	M.Cap (mn)	3358464.0
Group Performances			
Category	Mkt Cap (mn.)	Δ % M.Cap	Turnover BDT (mn)
Group A	2,628,921.63	0.4%	3,365.71
Group B	14,653.06	0.2%	127.89
Group N	29,987.64	1.9%	276.49
Group Z	25,389.53	0.1%	39.76

Turnover Scenario

Today's Turnover (mn.)	Change In BDT (mn.)	% Change
4204.08	(166)	-3.8%

Top Ten Volume (in BDT. crore)

Stock	TT	YT	AT	% Δ in Turnover	TT/AT	CP	YP	% Δ P	Number of shares	Public Holding
BXPHARMA	18.95	20.49	6.47	-7.5%	193.0%	70.4	69.3	1.6%	386,244,234.6	50%
BSRMLTD	15.58	8.14	7.94	91.3%	96.3%	130.9	123.1	6.3%	173,351,038.0	9%
AMANFEED	13.81	12.74	25.24	8.4%	-45.3%	68.4	63.3	8.1%	80,000,000.0	23%
ISLAMIBANK	13.66	11.45	9.24	19.3%	47.7%	28.9	27.5	5.1%	1,609,990,668.0	21%
AL-HAJTEX	12.93	7.23	6.82	78.9%	89.5%	122.4	127	-3.6%	15,230,211.6	72%
LAFSURCEML	11.43	15.69	12.76	-27.2%	-10.5%	109.4	108.4	0.9%	1,161,373,500.0	30%
SQURPHARMA	9.46	12.21	17.53	-22.5%	-46.0%	251.3	250	0.5%	623,586,546.0	9%
UNITEDAIR	8.42	12.16	6.87	-30.8%	22.5%	10.8	10.6	1.9%	624,808,800.0	74%
IFADAUTOS	7.27	6.02	4.91	20.7%	48.1%	104	103.4	0.6%	115,000,000.0	17%
APOLOISPAT	6.56	3.79	3.82	73.0%	71.9%	22.4	21.3	5.2%	287,500,000.0	36%

TT= Today's Turnover in crore, YT= Yesterday's Turnover in Crore, AT= Average of Last 20 day's Turnover, CP= Current Price, YP= Yesterday's Price, % Δ P= percentage change in price

Top Ten Gainer						Top Ten Loser					
Stock	CP	YP	AP	% Δ P	% Δ in P from AP	Stock	CP	YP	AP	% Δ P	% Δ in P from AP
POWERGRID	46.9	42.7	39.855	9.8%	17.7%	SONARGAON	9.20	9.90	8.79	-7.1%	4.7%
AMANFEED	68.4	63.3	72.55833333	8.1%	-5.7%	DESHBANDHU	15.70	16.80	14.54	-6.5%	8.0%
HAKKANIPUL	51.1	48	47.515	6.5%	7.5%	MEGHNALIFE	55.90	59.40	56.37	-5.9%	-0.8%
BSRMLTD	130.9	123.1	115.095	6.3%	13.7%	POPULARLIF	86.90	92.20	82.15	-5.7%	5.8%
ZEALBANGLA	8	7.6	7.505	5.3%	6.6%	SAVAREFR	52.10	55.00	49.42	-5.3%	5.4%
APOLOISPAT	22.4	21.3	22.025	5.2%	1.7%	RUPALILIFE	34.00	35.60	31.70	-4.5%	7.3%
APEXFOOT	405.3	385.6	383.855	5.1%	5.6%	NLTUBES	130.70	136.80	124.18	-4.5%	5.3%
ISLAMIBANK	28.9	27.5	28.64	5.1%	0.9%	RAHIMAFOOI	47.00	49.00	45.09	-4.1%	4.2%
DBH1STMF	4.8	4.6	4.4	4.3%	9.1%	BDLAMPS	197.90	206.10	180.01	-4.0%	9.9%
MONNOCERA	48.3	46.3	45.615	4.3%	5.9%	IMAMBUTTO	12.90	13.40	11.60	-3.7%	11.3%

AP= Average Price of last 20 day,% Δ in P from AP= percentage change in price from the 20-day average price

Industry /Sectors overview (Amounts in BDT. Crore)											
Sector	Trade Volume		MKT Turnover %		% Δ in Turnover	Market Capitalization		% of Total MC		% Δ in MC	
	Today	Yesterday	Today	Yesterday		Today	Yesterday	Today	Yesterday		
Bank	31.23	28.45	0.08	0.07	9.8%	39632.46	39404.49	14.71%	14.68%	0.6%	
Cement	18.19	23.85	0.05	0.06	-23.8%	19162.37	18998.76	7.11%	7.08%	0.9%	
Ceramics	3.85	5.13	0.01	0.01	-25.0%	2799.14	2792.52	1.04%	1.04%	0.2%	
Engineering	65.89	72.65	0.18	0.17	-9.3%	15121.48	14881.06	5.61%	5.55%	1.6%	
Food & Allied Product	18.05	20.68	0.05	0.05	-12.7%	24361.95	24297.74	9.04%	9.05%	0.3%	
Insurance	8.50	16.40	0.02	0.04	-48.2%	7298.10	7421.74	2.71%	2.77%	-1.7%	
IT	2.06	3.14	0.01	0.01	-34.5%	553.21	554.22	0.21%	0.21%	-0.2%	
Jute	0.66	0.64	0.00	0.00	3.7%	102.04	103.04	0.04%	0.04%	-1.0%	
Miscellaneous	26.40	28.46	0.07	0.07	-7.2%	9042.49	8949.19	3.36%	3.33%	1.0%	
Mutual Fund	7.27	7.25	0.02	0.02	0.2%	3153.28	3141.10	1.17%	1.17%	0.4%	
NBFI	17.23	13.74	0.05	0.03	25.4%	8206.94	8259.82	3.05%	3.08%	-0.6%	
Paper & Printing	1.76	1.78	0.00	0.00	-1.2%	229.29	224.86	0.09%	0.08%	2.0%	
Pharmaceuticals & Chemicals	57.58	80.03	0.15	0.19	-28.0%	41903.02	41822.01	15.55%	15.58%	0.2%	
Power & Energy	45.12	42.51	0.12	0.10	6.1%	38874.07	38632.19	14.43%	14.40%	0.6%	
Service & Real Estate	9.51	14.60	0.03	0.03	-34.9%	2010.58	2026.21	0.75%	0.76%	-0.8%	
Tannery	6.39	7.10	0.02	0.02	-10.0%	2652.43	2648.71	0.98%	0.99%	0.1%	
Telecommunication	4.00	7.15	0.01	0.02	-44.1%	43359.74	43206.69	16.09%	16.10%	0.4%	
Textile	40.30	36.83	0.11	0.09	9.4%	8629.33	8689.10	3.20%	3.24%	-0.7%	
Travel & Leisure	9.51	13.69	0.03	0.03	-30.5%	2318.94	2314.15	0.86%	0.86%	0.2%	

MC= Market Capitalization, % Δ in Turnover= change in turnover from last day, % Δ in MC= change in Market cap from last day

Index Movers	Index Shakers	Sector wise P/E			
ISLAMIBANK	RENATA	Bank	8.66	NBFI	33.82
POWERGRID	LINDEBD	Cement	39.50	Paper & Printing	80.43
GP	RUPALIBANK	Ceramics	41.52	Pharmaceuticals & Chemicals	27.08
BSRMLTD	UPGDCL	Engineering	38.74	Power & Energy	16.62
LAFSURCEML	DBH	Food & Allied Product	34.77	Service & Real Estate	43.03
SQRPHARMA	POPULARLIF	Insurance	14.93	Tannery	35.75
OLYMPIC	BSCCL	IT	17.79	Telecommunication	26.42
BSRMSTEEL	ACIFORMULA	Jute	168.75	Textile	17.77
TITASGAS	SOUTHEASTB	Miscellaneous	35.04	Travel & Leisure	14.87
HEIDELBCEM	SPCL				

Important News	Recent Dividend Declaration		
	Ticker	Dividend	Record Date
<p>Company News:</p> <p>ZAHEENSPIN: Investment in the Subsidiary Company: The Company has informed that the Board of Directors of the Company has decided to make 51% investment in the shares for establishment of a subsidiary company namely Zaheen Polymer Ltd. with an authorized share capital of Tk. 10.00 million divided into 1,000,000 ordinary shares of Tk. 10.00 each. The tentative project cost, annual turnover, NPAT is Tk. 200.00 million, Tk. 270.00 million and Tk. 82.30 million respectively. As a result net profit after tax of Zaheen Spinning Ltd. will go up by Tk. 42.00 million and the tentative time of commencement of production is June, 2016.</p> <p>SAIHAMCOT: Q1 Financials (Q1 Un-audited): EPS for May-July, 2015 was Tk. 0.27 as against Tk. 0.40 for May-July, 2014; NOCFPS was Tk. 1.65 for May-July, 2015 as against Tk. (2.78) for May-July, 2014. NAV per share was Tk. 25.22 as of July 31, 2015 and Tk. 24.59 as of July 31, 2014.</p> <p>RUPALILIFE: Address Change of Head Office: The Company has informed that the Head Office of the Company has been shifted to its own building Rupali Life Tower, 50, Kakrail, Dhaka-1000 with effect from September 15, 2015.</p>	Bangladesh Building Systems	20% B	20.09.15
	Saiham Cotton Mills Limited	5% C & 10% B	17.09.15
	Note: C= cash Dividend, B= Bonus Dividend, R=Right, N/A=NotApplicable		

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