

Today's Market Overview

Thursday, September 03, 2015

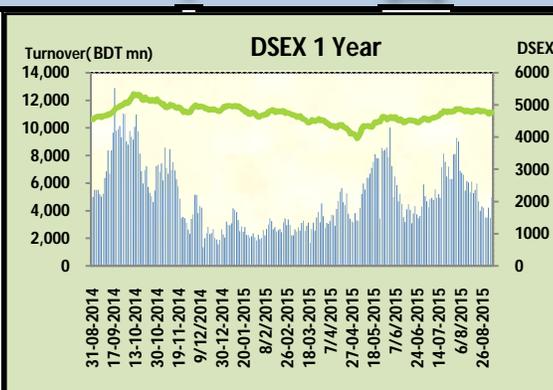


DSEX	4,765.72	0.04%	Issues Traded	Advanced	Declined	Unchanged
Turnover (BDT mn)	4,985.92	42.9%		174	95	44

After consuming the initial sale pressure market tried to remain flat with a heavily improved turnover. Turnover crossed the 4.5 billion mark after eight trading days. Investors were perplexed as DSEX was flat in movement while turnover changed heavily. The premier bourse of the nation opened with a negative mood but enthusiastic participation recovered it quickly and after midsession it remained in flat progress till the closure. Reluctant behavior of some big cap stocks didn't allow the DSEX to move up. Among the other two indices DS30 was marginally poor while DSES the shariah based index was marginally positive. Major & prominent sectors put a mixed performance. Service, NBFI, Cement & Pharmaceuticals tried to gain while Bank, Ceramics & Telecom couldn't perform positively.

The general gauge DSEX ended at 4765.72 with an advance of +0.03% which added 1.84 points to the broad DSEX. The Turnover advanced heavily by +42.9% which was 1498 Million BDT healthier than that of previous day and finally finished the mark at 4985.92 million BDT. A total of 174 issues advanced with 95 declined and 44 remained unchanged. Sectors that improved were: cement (+0.8%) IT (+0.8%) NBFI (+0.9%) Pharmaceuticals (+0.5%) Service (+1.9%) Textile (+0.5%) Paper (+1.8%) Food (+0.5%) & sectors that declined were: Bank (-0.5%) Ceramics (-0.3%) Power (-0.4%) Telecom (-0.2%) Travel (-1.0%)

Debutant AMANFEED topped in the Volume chart with a turnover of 60.58 BDT crore. MODERNFUE ranked top gainer chart with a price hike of +73.0% and ICB1STNRB topped in the loser chart with a decline of -10.0% from its prevailing price. RENATA led the way in the index mover chart while ISLAMIBANK played the shatter part.



Index Scenario				Market Highlights				
INDEX	Change	% Changes		DSEX 52 week H/L	5334/3960	Market P/E (LTM)	15.91	
DSEX	4765.72	1.84	0.0%	DSEX Week H/L	4791/4724	M.Cap (mn)	3347098.5	
DSES	1177.11	0.87	0.1%	Group Performances				
DS30	1823.17	(1.83)	-0.1%	Category	Mkt Cap (mn.)	Δ % M.Cap	Turnover BDT (mn)	Δ % Turnover
Turnover Scenario				Group A	2,617,344.88	0.1%	3,896.23	35.1%
Today's Turnover (mn.)	Change In BDT (mn.)	% Change		Group B	14,259.01	1.7%	208.90	31.2%
4985.92	1,498	42.9%		Group N	31,144.63	-2.5%	724.52	182.4%
				Group Z	24,770.16	1.0%	55.38	-41.8%

Top Ten Volume (in BDT. crore)											
Stock	TT	YT	AT	% Δ in Turnover	TT/AT	CP	YP	% Δ P	Number of shares	Public Holding	
AMANFEED	60.58	17.22	40.02	251.9%	51.4%	79.5	85.3	-6.8%	80,000,000.0	23%	
SPCL	13.55	7.66	15.96	77.0%	-15.1%	185.5	189.6	-2.2%	133,137,900	19%	
EMERALDOIL	13.36	9.13	6.16	46.3%	116.9%	48.8	46.5	4.9%	49,350,000.00	38%	
SQURPHARMA	12.84	16.29	19.78	-21.2%	-35.1%	253.2	254.4	-0.5%	623,586,546.00	9%	
KBPPWBIL	11.25	7.86	4.06	43.1%	177.4%	28.9	28.3	2.1%	69,850,000.00	28%	
LINDEBD	9.46	0.59	1.29	1505.6%	635.5%	1176.6	1107.5	6.2%	15,218,280.00	19%	
UPGDCL	9.06	7.69	17.10	17.9%	-47.0%	147.3	150.2	-1.9%	362,944,698.60	5%	
LAFSURCEML	8.67	7.39	14.32	17.3%	-39.5%	113.7	113.4	0.3%	1,161,373,500.00	30%	
FARCHEM	8.22	4.55	10.49	80.8%	-21.6%	55.3	53.9	2.6%	109,237,878.00	12%	
IBNSINA	7.64	5.81	3.65	31.6%	109.4%	148.2	142.3	4.1%	22,453,200.00	46%	

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
MODERNDYE	158.1	91.4	84.1	73.0%	88.0%	ICB1STNRB	19.80	22.00	22.14	-10.0%	-10.5%
ANWARGALV	63.4	57.7	51.565	9.9%	23.0%	ICB1STNRB	19.80	22.00	22.14	-10.0%	-10.5%
MEGCONMILK	8.9	8.1	7.715	9.9%	15.4%	ICBSONALI1	6.50	7.20	7.01	-9.7%	-7.3%
BEACHHATCH	22.5	20.5	20.76	9.8%	8.4%	IFILISLMF1	6.40	7.00	6.93	-8.6%	-7.6%
AIBL1STMF	6.1	5.6	5.01	8.9%	21.8%	PRIME1ICBA	4.90	5.30	5.12	-7.5%	-4.2%
FUWANGCER	14	13	13.01	7.7%	7.6%	ICB3RDNRB	4.00	4.30	4.39	-7.0%	-8.8%
LEGACYFOOT	33.2	30.9	27.32	7.4%	21.5%	AMANFEED	79.50	85.30	74.75	-6.8%	6.4%
GEMINISEA	457.6	426.7	419.24	7.2%	9.1%	ICBAMCL2ND	4.40	4.70	4.80	-6.4%	-8.3%
APEXFOODS	157.5	146.9	155.455	7.2%	1.3%	ICBEPMF1S1	5.50	5.80	6.03	-5.2%	-8.8%
MBL1STMF	4.8	4.5	4.48	6.7%	7.1%	ICB2NDNRB	7.40	7.80	8.02	-5.1%	-7.7%

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	30.95	23.47	0.06	0.07	31.9%	39279.76	39490.78	14.64%	14.73%	-0.5%	
Cement	13.46	10.44	0.03	0.03	28.9%	19457.68	19294.98	7.25%	7.20%	0.8%	
Ceramics	6.71	4.89	0.01	0.01	37.4%	2805.00	2814.19	1.05%	1.05%	-0.3%	
Engineering	52.31	43.90	0.11	0.13	19.2%	14608.74	14616.03	5.45%	5.45%	0.0%	
Food & Allied Product	34.90	19.48	0.07	0.06	79.1%	24089.36	23961.97	8.98%	8.94%	0.5%	
Insurance	4.37	3.13	0.01	0.01	39.5%	7081.39	7108.77	2.64%	2.65%	-0.4%	
IT	2.80	2.35	0.01	0.01	19.1%	553.16	548.59	0.21%	0.20%	0.8%	
Jute	1.04	0.70	0.00	0.00	49.5%	108.04	108.67	0.04%	0.04%	-0.6%	
Miscellaneous	90.11	39.28	0.19	0.12	129.4%	8779.85	8820.63	3.27%	3.29%	-0.5%	
Mutual Fund	9.86	6.27	0.02	0.02	57.3%	3257.67	3268.82	1.21%	1.22%	-0.3%	
NBFI	20.79	15.54	0.04	0.05	33.8%	8211.33	8139.38	3.06%	3.04%	0.9%	
Paper & Printing	2.60	1.80	0.01	0.01	44.3%	225.12	221.06	0.08%	0.08%	1.8%	
Pharmaceuticals & Chemicals	62.96	60.87	0.13	0.18	3.4%	41198.67	40975.11	15.36%	15.28%	0.5%	
Power & Energy	67.96	39.76	0.14	0.12	70.9%	38743.03	38888.49	14.44%	14.50%	-0.4%	
Service & Real Estate	14.28	9.80	0.03	0.03	45.7%	2030.41	1992.73	0.76%	0.74%	1.9%	
Tannery	11.09	8.51	0.02	0.03	30.3%	2539.01	2522.34	0.95%	0.94%	0.7%	
Telecommunication	8.72	7.04	0.02	0.02	23.9%	44331.96	44399.44	16.53%	16.56%	-0.2%	
Textile	42.94	32.20	0.09	0.10	33.3%	8639.24	8598.63	3.22%	3.21%	0.5%	
Travel & Leisure	5.32	5.13	0.01	0.02	3.7%	2328.69	2351.92	0.87%	0.88%	-1.0%	

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			
RENATA	ISLAMIBANK	Bank	8.61	NBFI	31.55
LINDEBD	UPGDCL	Cement	40.87	Paper & Printing	69.60
BATBC	SQURPHARMA	Ceramics	39.98	Pharmaceuticals & Chemicals	26.51
HEIDELBCEM	SPCL	Engineering	36.77	Power & Energy	16.55
DUTCHBANGL	BSCCL	Food & Allied Product	34.15	Service & Real Estate	43.72
GLAXOSMITH	AMANFEED	Insurance	14.37	Tannery	34.31
LAFSURCEML	BSRMLTD	IT	17.83	Telecommunication	26.62
MICEMENT	MPETROLEUM	Jute	178.26	Textile	17.73
SAPORTL	BEXIMCO	Miscellaneous	33.71	Travel & Leisure	15.19
PREMIERCEM	RAKCERAMIC				

Important News

Company News:

MODERN DYE: Dividend Declaration: The Board of Directors has recommended 10% cash dividend for the year ended on 30.06.2015. Date of AGM: 15.10.2015, Time: 11:00 AM, Venue: Spectra Convention Center Ltd, House#19, Road#7, Gulshan#1, Dhaka#1212. Record Date: 23.09.2015. The Company has also reported profit after tax of Tk. 1.59 million, EPS of Tk. 1.16, NAV per share of Tk. 11.49 and NOCFPS of Tk. (0.37) for the year ended on 30.06.2015 as against Tk. 2.14 million, Tk. 1.56, Tk. 11.13 and Tk. 3.83 respectively for the year ended 30.06.2014.

PTL: Purchasing brand new Capital Machineries: The Company has informed that the Board of Directors of the Company has decided to purchase the Capital Machineries as per following specification: Name of Machinery: Travelling Cleaners, Supplier Name: ELECTRO-JET, S.A; Country of origin: Spain, Mode of Payment: 100% Irrevocable & confirmed L/C, payable at sight and Total Price: Euro 1,13,000.00.

IDLC: Consent of BSEC to issue Infrastructure & SME Zero Coupon Bond: BSEC has given consent to IDLC Finance Limited for issuance of IDLC Infrastructure & SME Zero Coupon Bond amounting to Tk. 5,000.00 million only through private placement. The consent has been accorded subject to compliance with the relevant laws and regulatory requirements and also adherence to the conditions imposed by BSEC under Section-2CC of the Securities and Exchange Ordinance, 1969.

Recent Dividend Declaration

Ticker	Dividend	Record Date
Aims 1st Mutual Fund	175% RIU	07.09.15
Apex Tannery Limited	45% C	09.09.15
Grameen Mutual Fund One Scheme Two	15% RIU	07.09.15
Grameen Mutual Fund One Scheme One	82% RIU	07.09.15
PHP First Mutual Fund	7.50% RIU	07.09.15
EBL NRB Mutual Fund	6% RIU	07.09.15
AB Bank 1st Mutual fund	15% RIU	07.09.15

Note: C= cash Dividend, B= Bonus Dividend, R=Right, N/A=NotApplicable

DSEX Technical Graph for last one year



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