

Today's Market Overview

Sunday, August 16, 2015

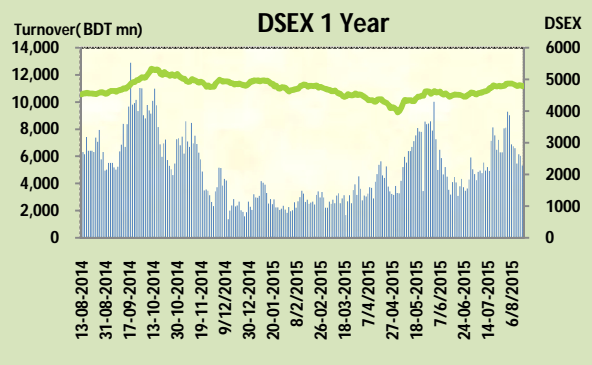


| | | | | | | |
|--------------------------|----------|----------------|----------------------|-------------------|-------------------|--------------------|
| DSEX | 4,783.81 | -0.52% | Issues Traded | ↑ Advances | ↓ Declines | ↔ Unchanged |
| Turnover (BDT mn) | 5,334.05 | -11.58% | | | | |

DSEX again dipped down below 4800 mark with a very sluggish turnover as investors took the vigilant posture to observe the market trend. Turnover again came below 5.5 billion mark as most of the investors were inactive. Current market movement actually forced active investors to remain in the side line. The premier bourse of the nation opened with a negative mood and continued the same mood till the closure. Other two indices DS30 & DSES the shariah based index both performed poor. Most of the major sector put negative performances in the board while Ceramics & Engineering managed to gain. Mutual fund, NBFI, Travel & Service sector dominated the sale side. Shrunken turnover actually annoyed the dynamic investors and prevented them to put fresh fund in the market.

The general gauge DSEX ended at 4783.81 with a decline of -0.52% which cut 25.06 points from the broad DSEX. The Turnover declined by -11.58% which was 698 Million BDT poorer than that of previous day and finally finished the mark at 5334.05 million BDT. A total of 80 issues advanced with 202 declined and 38 remained unchanged. Sectors that improved were: Bank (+0.01%) Miscellaneous (+0.13%) Ceramics (+0.18%) Engineering (+0.02%) Jute (+5.08%) & sectors that declined were: Pharmaceuticals (-5.0%) Cement (-1.0%) Insurance (-0.6%) Power (-0.3%) NBFI (-1.02%) Service (-1.1%) Textile (-0.82%) Travel (-1.8%) Mutual Fund (-2.8%).

SPCL topped in the Volume chart with a turnover of 32.10 BDT crore. EXIM1STMF ranked top gainer chart with a price hike of +11.86% and SQURPHARMA topped in the loser chart with a decline of -11.6% from its prevailing price. SPCL led the way in the index mover chart while SQURPHARMA played the shatter part.



Index Scenario

| | INDEX | Change | % Changes |
|------|---------|---------|-----------|
| DSEX | 4783.81 | (25.06) | -0.5% |
| DSES | 1184.64 | (6.36) | -0.5% |
| DS30 | 1845.27 | (14.12) | -0.8% |

Market Highlights

| | | | |
|------------------|-----------|------------------|-----------|
| DSEX 52 week H/L | 5334/3960 | Market P/E (LTM) | 15.99 |
| DSEX Week H/L | 4844/4783 | M.Cap (mn) | 3356816.1 |

Group Performances

| Category | Mkt Cap (mn.) | Δ % M.Cap | Turnover BDT (mn) | Δ % Turnover |
|----------|---------------|-----------|-------------------|--------------|
| Group A | 2,636,019.82 | -1.1% | 4,982.41 | -11.7% |
| Group B | 13,855.85 | -0.1% | 93.98 | -4.4% |
| Group N | 26,159.29 | -1.0% | 149.16 | -12.6% |
| Group Z | 24,895.39 | -1.3% | 48.78 | -7.4% |

Turnover Scenario

| Today's Turnover (mn.) | Change In BDT (mn.) | % Change |
|------------------------|---------------------|----------|
| 5334.05 | (698) | -11.6% |

Top Ten Volume (in BDT. crore)

| Stock | TT | YT | AT | % Δ in Turnover | TT/AT | CP | YP | % Δ P | Number of shares | Public Holding |
|------------|-------|-------|-------|-----------------|---------|-------|-------|--------|------------------|----------------|
| SPCL | 32.10 | 15.85 | 17.74 | 102.54% | 80.94% | 198.5 | 188.1 | 5.5% | 133,137,900.0 | 19% |
| SQURPHARMA | 31.74 | NT | 19.84 | NM | 60.02% | 237 | 268 | -11.6% | 623,586,546 | 9% |
| RSRMSTEEL | 27.69 | 18.21 | 9.30 | 52.07% | 197.69% | 68.8 | 64.1 | 7.3% | 65,520,000.00 | 41% |
| ISLAMIBANK | 23.86 | 42.87 | 13.78 | -44.3% | 73.15% | 30.8 | 30 | 2.7% | 1,609,990,668.00 | 21% |
| UPGDCL | 20.33 | 23.32 | 24.93 | -12.8% | -18.4% | 159.8 | 161.6 | -1.1% | 362,944,698.60 | 5% |
| CENTRALPHL | 14.82 | 9.98 | 3.69 | 48.55% | 301.64% | 30.7 | 28.9 | 6.2% | 81,995,000.00 | 20% |
| BSRMLTD | 13.49 | 15.88 | 14.24 | -15.0% | -5.2% | 120.7 | 117.1 | 3.1% | 173,351,038.00 | 9% |
| AL-HAJTEX | 12.78 | 5.93 | 6.74 | 115.36% | 89.56% | 139.7 | 130.4 | 7.1% | 15,230,211.60 | 72% |
| FARCHEM | 12.09 | 12.34 | 13.29 | -2.0% | -9.0% | 55.1 | 56.1 | -1.8% | 109,237,878.00 | 12% |
| EMERALDOIL | 10.86 | 10.55 | 5.57 | 2.95% | 95.08% | 46.4 | 45.4 | 2.2% | 49,350,000.00 | 38% |

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 |
| EXIM1STMF | 6.6 | 5.9 | 5.985 | 11.86% | 10.28% | SQRPHARMA | 237.00 | 268.00 | 264.79 | -11.6% | -10.50% |
| BEACHHATCH | 21.5 | 19.6 | 19.77 | 9.69% | 8.75% | EBLNRBMF | 4.30 | 4.80 | 4.81 | -10.4% | -10.51% |
| APEXFOODS | 147.1 | 134.9 | 120.85 | 9.04% | 21.72% | 7THICB | 96.30 | 106.70 | 102.89 | -9.7% | -6.40% |
| NORTHERN | 300.7 | 277.7 | 224.505 | 8.28% | 33.94% | EBL1STMF | 4.90 | 5.40 | 5.22 | -9.3% | -6.13% |
| BDWELDING | 25.5 | 23.6 | 23.415 | 8.05% | 8.90% | TRUSTB1MF | 5.10 | 5.60 | 5.45 | -8.9% | -6.42% |
| RSRMSTEEL | 68.8 | 64.1 | 59.045 | 7.33% | 16.52% | 8THICB | 62.00 | 67.80 | 70.42 | -8.6% | -11.95% |
| AL-HAJTEX | 139.7 | 130.4 | 112.435 | 7.13% | 24.25% | 2NDICB | 265.80 | 290.00 | 306.70 | -8.3% | -13.34% |
| CENTRALPHL | 30.7 | 28.9 | 28.49 | 6.23% | 7.76% | 6THICB | 54.00 | 58.90 | 63.42 | -8.3% | -14.85% |
| SPCL | 198.5 | 188.1 | 184.435 | 5.53% | 7.63% | 3RDICB | 281.00 | 305.60 | 290.54 | -8.0% | -3.28% |
| MONNOCERA | 37.4 | 35.6 | 32.54 | 5.06% | 14.94% | SAMATALETH | 28.40 | 30.30 | 29.76 | -6.3% | -4.57% |

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 | 42.04 | 63.96 | 0.08 | 0.11 | -34.3% | 39463.57 | 39461.27 | 14.64% | 14.48% | 0.01% |
| Cement | 14.38 | 18.61 | 0.03 | 0.03 | -22.7% | 20132.04 | 20333.99 | 7.47% | 7.46% | -1.0% |
| Ceramics | 3.88 | 3.49 | 0.01 | 0.01 | 11.20% | 2861.41 | 2856.36 | 1.06% | 1.05% | 0.18% |
| Engineering | 102.07 | 130.74 | 0.20 | 0.22 | -21.9% | 15412.44 | 15409.14 | 5.72% | 5.65% | 0.02% |
| Food & Allied Product | 24.76 | 27.42 | 0.05 | 0.05 | -9.7% | 23869.45 | 23983.79 | 8.85% | 8.80% | -0.5% |
| Insurance | 6.87 | 11.01 | 0.01 | 0.02 | -37.6% | 7244.42 | 7289.89 | 2.69% | 2.68% | -0.6% |
| IT | 4.13 | 5.14 | 0.01 | 0.01 | -19.7% | 553.63 | 553.78 | 0.21% | 0.20% | 0.0% |
| Jute | 1.50 | 1.12 | 0.00 | 0.00 | 34.90% | 98.76 | 93.99 | 0.04% | 0.03% | 5.08% |
| Miscellaneous | 12.16 | 16.09 | 0.02 | 0.03 | -24.4% | 8299.62 | 8288.49 | 3.08% | 3.04% | 0.13% |
| Mutual Fund | 14.33 | 11.95 | 0.03 | 0.02 | 19.96% | 3350.91 | 3449.15 | 1.24% | 1.27% | -2.8% |
| NBFI | 11.88 | 12.47 | 0.02 | 0.02 | -4.8% | 7883.10 | 7964.61 | 2.92% | 2.92% | -1.0% |
| Paper & Printing | 1.35 | 1.26 | 0.00 | 0.00 | 7.25% | 233.67 | 240.01 | 0.09% | 0.09% | -2.6% |
| Pharmaceuticals & Chemical | 101.32 | 71.60 | 0.19 | 0.12 | 41.50% | 40063.28 | 42180.22 | 14.86% | 15.48% | -5.0% |
| Power & Energy | 93.38 | 90.53 | 0.18 | 0.15 | 3.15% | 39596.36 | 39716.08 | 14.69% | 14.57% | -0.3% |
| Service & Real Estate | 6.17 | 10.00 | 0.01 | 0.02 | -38.3% | 1961.63 | 1984.21 | 0.73% | 0.73% | -1.1% |
| Tannery | 5.38 | 4.35 | 0.01 | 0.01 | 23.71% | 2457.87 | 2476.65 | 0.91% | 0.91% | -0.8% |
| Telecommunication | 8.73 | 15.62 | 0.02 | 0.03 | -44.1% | 44774.34 | 44780.32 | 16.61% | 16.43% | 0.0% |
| Textile | 54.91 | 82.42 | 0.11 | 0.14 | -33.4% | 8913.85 | 8987.22 | 3.31% | 3.30% | -0.8% |
| Travel & Leisure | 10.95 | 10.25 | 0.02 | 0.02 | 6.76% | 2409.01 | 2454.34 | 0.89% | 0.90% | -1.8% |

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 | |
|--------------|---------------|-----------------------------|--------|
| SPCL | SQRPHARMA | Bank | 8.55 |
| ISLAMIBANK | LAFSURCEML | Cement | 42.86 |
| BERGERPBL | BXPBARMA | Ceramics | 37.01 |
| BSRMLTD | UPGDCL | Engineering | 38.02 |
| BSRMSTEEL | BATBC | Food & Allied Product | 35.27 |
| POWERGRID | OLYMPIC | Insurance | 14.51 |
| RSRMSTEEL | RENATA | IT | 17.70 |
| PRIMEBANK | TITASGAS | Jute | 163.47 |
| MARICO | BEXIMCO | Miscellaneous | 37.87 |
| CENTRALPHL | MJLBD | NBFI | 30.83 |
| | | Paper & Printing | 66.69 |
| | | Pharmaceuticals & Chemicals | 26.13 |
| | | Power & Energy | 17.02 |
| | | Service & Real Estate | 41.49 |
| | | Tannery | 33.91 |
| | | Telecommunication | 28.95 |
| | | Textile | 18.20 |
| | | Travel & Leisure | 15.59 |

Important News

Company News:

SQURPHARMA: Q1 Financials: (Q1 Un-audited): Consolidated EPS for April-June, 2015 was Tk. 3.28 as against Tk. 2.51 for April-June, 2014; Consolidated NOCFPS was Tk. 3.11 for April-June, 2015 as against Tk. 1.76 for April-June, 2014. Consolidated NAV per share was Tk. 59.38 as of June 30, 2015 and Tk. 56.09 as of March 31, 2015.

JAMUNABANK: Q2 Financials: (Q2 Un-audited): Consolidated EPS for April-June, 2015 was Tk. 0.69 as against Tk. 0.33 for April-June, 2014, consolidated EPS for Jan-June, 2015 was Tk. 0.75 as against Tk. 0.46 for Jan-June, 2014. Consolidated NOCFPS was Tk. (6.62) for Jan-June, 2015 as against Tk. 2.98 for Jan-June, 2014. Consolidated NAV per share was Tk. 18.27 as of June 30, 2015 and Tk. 15.46 as of June 30, 2014.

AIMS1STMF: Dividend Declaration: The Trustee Committee of the Fund has approved the audited accounts of the Fund for the year ended 30th June 2015. The Fund reported net profit of Tk. 13,94,72,032.00 with earnings per unit of Tk. 2.24. Taking into consideration available fund from reserves the Trustee Board has approved 175% Dividend on the Capital Fund of Tk. 62,17,50,000.00 in the form of Re-Investment units to be issued at a valuation based on last published NAV per unit before Record date. Record date: 07.09.2015.

Recent Dividend Declaration

| Ticker | Dividend | Record Date |
|----------------------------------|-----------------|-------------|
| National Bank Limited | 10%B | 30.08.15 |
| Navana CNG Limited | 15%C | 18.08.15 |
| Berger Paints Bangladesh Limited | 100%C (Interim) | 20.08.15 |
| Shasha Denim Limited | 10%C (Interim) | 20.08.15 |
| Apex Spinning | 20%C | 18.08.15 |
| Sunlife Insurance Limited | 6%B | 18.08.15 |

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

DSEX Technical Graph for last one year



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