

# Today's Market Overview

Thursday, October 15, 2015

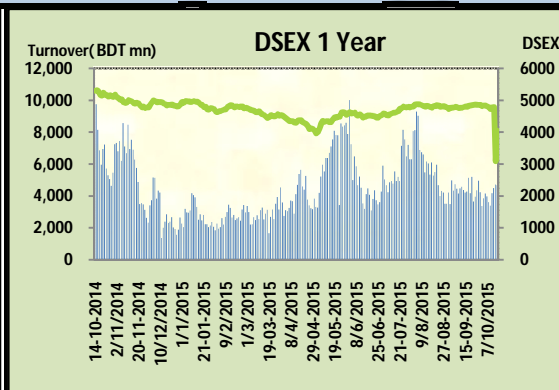


<b>DSEX</b>	4,676.63	<b>-0.84%</b>	<b>Issues Traded</b>	<b>Advanced</b>	<b>Declined</b>	<b>Unchanged</b>
<b>Turnover (BDT mn)</b>	4,044.93	<b>30.9%</b>		98	176	46

Market continued the bearish run for the two consecutive days with slightly improved turnover as debutant KDSALTD provoked the investors to increase their participation. Market started with positive mood but extreme sale pressure in some big cap stocks plunged the market dipped below the 4700 mark after sixty trading days. Mostly Telecom & Cement sector was in supply glut and investors were really perplexed of seeing these giants' fall. Other two indices DS30 & DSES the shariah based index both really performed poor. Most of the major sectors were poor except Ceramics & Travel.

The general gauge DSEX ended at 4676.63 with a decline of -0.8% which cut 39.45 points from the broad DSEX. The Turnover advanced by +30.9% which was 956 Million BDT healthier than that of previous day and finally finished the mark at 4044.93 million BDT. A total of 98 issues advanced with 176 declined and 46 remained unchanged. Sectors that improved were: Ceramics (+1.2%) Travel (+0.5%) Pharmaceuticals (+0.1%) & sectors that declined were: Bank (-0.9%) Cement (-4.2%) Engineering (-0.6%) NBF1 (-0.2%) Telecom (-4.0%) Power (-0.9%) Textiles (-0.44%).

Debutant KDSALTD topped in the Volume chart with a turnover of 45.77 BDT crore. AZIZPIPES ranked top gainer chart with a price hike of +9.8% and APOLOISPAT topped in the loser chart with a decline of -12.5% from its prevailing price. MARICO led the way in the index mover chart while GP played the shatter part.



Index Scenario				Market Highlights				
INDEX	Change	% Changes		DSEX 52 week H/L	5334/3960	Market P/E (LTM)	15.13	
DSEX	4676.63	(39.45)	-0.8%	DSEX Week H/L	4780/4676	M.Cap (mn)	3213856.3	
DSES	1114.84	(12.74)	-1.1%	Group Performances				
DS30	1766.50	(21.75)	-1.2%	Category	Mkt Cap (mn.)	Δ % M.Cap	Turnover BDT (mn)	Δ % Turnover
Turnover Scenario				Group A	2,489,733.22	-1.2%	3,086.09	11.8%
Today's Turnover (mn.)	Change In BDT (mn.)	% Change		Group B	13,811.77	-0.4%	79.84	15.1%
4044.93	956	30.9%		Group N	28,922.33	0.9%	632.80	527.4%
				Group Z	24,744.36	0.0%	23.52	27.7%

Top Ten Volume (in BDT. crore)										
Stock	TT	YT	AT	% Δ in Turnover	TT/AT	CP	YP	% Δ P	Number of shares	Public Holding
KDSALTD	45.77	NT	45.77	NM	0.0%	20	20	0.0%	52,000,000.0	21%
LAFSURCEML	32.82	12.27	12.26	167.5%	167.7%	89.8	96.2	-6.7%	1,161,373,500.0	30%
BXPHERMA	19.55	17.94	17.62	9.0%	10.9%	73.7	74.8	-1.5%	386,244,234.6	50%
GP	11.94	7.86	9.74	52.0%	22.5%	244.5	255.3	-4.2%	1,350,300,022.0	4%
UNITEDAIR	11.32	6.14	7.89	84.4%	43.4%	10	9.7	3.1%	624,808,800.0	74%
AMANFEED	9.94	5.16	8.01	92.6%	24.2%	57.6	54.7	5.3%	80,000,000.0	23%
CVOPRL	8.52	10.30	3.96	-17.3%	114.9%	449.1	446.3	0.6%	19,800,000.0	34%
BRACBANK	7.83	8.54	5.86	-8.4%	33.6%	47.3	49.5	-4.4%	709,287,321.0	46%
EMERALDOIL	7.34	4.28	4.02	71.3%	82.5%	53.3	51.7	3.1%	49,350,000.0	38%
CITYBANK	7.27	5.63	4.59	29.0%	58.3%	20.4	20.5	-0.5%	875,798,031.2	59%

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
AZIZPIPES	39.1	35.6	26.875	9.8%	45.5%	APOLOISPAT	18.90	21.60	22.08	-12.5%	-14.4%
IPDC	21.3	19.4	19.83	9.8%	7.4%	LAFSURCEMI	89.80	96.20	104.16	-6.7%	-13.8%
BEACHHATCH	15.2	14.1	17.345	7.8%	-12.4%	MODERNDYE	140.10	149.20	157.01	-6.1%	-10.8%
MEGCONMILK	8.1	7.6	8.01	6.6%	1.1%	STYLECRAFT	952.30	998.00	993.89	-4.6%	-4.2%
PRIMEIICBA	5	4.7	4.725	6.4%	5.8%	ZEALBANGLA	6.40	6.70	7.24	-4.5%	-11.5%
AMANFEED	57.6	54.7	62.305	5.3%	-7.6%	BRACBANK	47.30		43.48		8.8%
GBBPOWER	17.7	17	17.705	4.1%	0.0%	GP	244.50	255.30	281.17	-4.2%	-13.0%
GPHISPAT	41	39.4	43.345	4.1%	-5.4%	TRUSTB1MF	4.70	4.90	4.70	-4.1%	0.0%
ZAHEENSPIN	31.2	30.1	30.055	3.7%	3.8%	ALLTEX	19.30	20.10	19.58	-4.0%	-1.4%
ARAMIT	394.6	381.3	365.73	3.5%	7.9%	HAKKANIPUL	44.20	46.00	49.26	-3.9%	-10.3%

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	50.99	48.19	0.13	0.16	5.8%	41881.98	42253.82	16.40%	16.36%	-0.9%	
Cement	41.07	20.43	0.11	0.07	101.0%	16839.26	17574.48	6.59%	6.80%	-4.2%	
Ceramics	5.67	3.87	0.01	0.01	46.4%	2752.16	2718.29	1.08%	1.05%	1.2%	
Engineering	80.46	28.38	0.21	0.10	183.5%	14524.15	14605.91	5.69%	5.65%	-0.6%	
Food & Allied Product	13.93	12.25	0.04	0.04	13.7%	24001.95	23962.10	9.40%	9.28%	0.2%	
Insurance	3.80	4.91	0.01	0.02	-22.7%	7052.44	7067.07	2.76%	2.74%	-0.2%	
IT	1.16	1.75	0.00	0.01	-33.7%	518.61	519.45	0.20%	0.20%	-0.2%	
Jute	0.67	0.57	0.00	0.00	19.1%	96.40	99.05	0.04%	0.04%	-2.7%	
Miscellaneous	18.91	11.54	0.05	0.04	63.9%	8491.88	8487.90	3.33%	3.29%	0.0%	
Mutual Fund	7.69	6.86	0.02	0.02	12.2%	3570.25	3586.41	1.40%	1.39%	-0.5%	
NBFI	15.22	11.93	0.04	0.04	27.6%	8212.41	8227.25	3.22%	3.18%	-0.2%	
Paper & Printing	0.75	0.84	0.00	0.00	-11.5%	204.50	207.92	0.08%	0.08%	-1.6%	
Pharmaceuticals & Chemicals	45.44	47.29	0.12	0.16	-3.9%	40592.63	40542.56	15.89%	15.69%	0.1%	
Power & Energy	38.55	40.79	0.10	0.14	-5.5%	37222.37	37554.21	14.57%	14.54%	-0.9%	
Service & Real Estate	3.39	10.52	0.01	0.04	-67.8%	2021.85	2038.04	0.79%	0.79%	-0.8%	
Tannery	3.16	2.53	0.01	0.01	24.8%	2506.28	2509.20	0.98%	0.97%	-0.1%	
Telecommunication	13.85	9.33	0.04	0.03	48.5%	34648.90	36084.74	13.57%	13.97%	-4.0%	
Textile	23.42	24.79	0.06	0.08	-5.5%	8057.89	8108.18	3.16%	3.14%	-0.6%	
Travel & Leisure	12.52	7.74	0.03	0.03	61.9%	2193.88	2183.97	0.86%	0.85%	0.5%	

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			
MARICO	GP	Bank	9.09	NBFI	31.75
DUTCHBANGL	LAFSURCEML	Cement	31.75	Paper & Printing	68.04
RAK CERAMIC	BRACBANK	Ceramics	37.62	Pharmaceuticals & Chemicals	26.79
NATLIFEINS	TITASGAS	Engineering	35.67	Power & Energy	15.82
IPDC	APOLOISPAT	Food & Allied Product	34.97	Service & Real Estate	41.93
AMANFEED	MJLBD	Insurance	14.19	Tannery	34.19
BSCCL	ISLAMIBANK	IT	16.76	Telecommunication	22.99
GPHISPAT	BXPHERMA	Jute	158.54	Textile	16.77
UNITEDAIR	DESCO	Miscellaneous	34.18	Travel & Leisure	14.20
SQRPHARMA	EBL				

## Important News

### Company News:

**TOSRIFA: Land Purchase and land lease agreement:** The Company has informed that the Board of Directors has decided the following decisions: I. proposed project land area of 40.87 decimal at Baraidiarchala, Kaura, Sreepur, Gazipur has been transferred to the Company from Mr. Naim Hassan, Sponsor/Director of the Company. The transaction value of the land is Tk. 1,98,336.18 per decimal, total of Tk. 81,06,000.00 which is the government price schedule of relevant land registry office.(cont.)

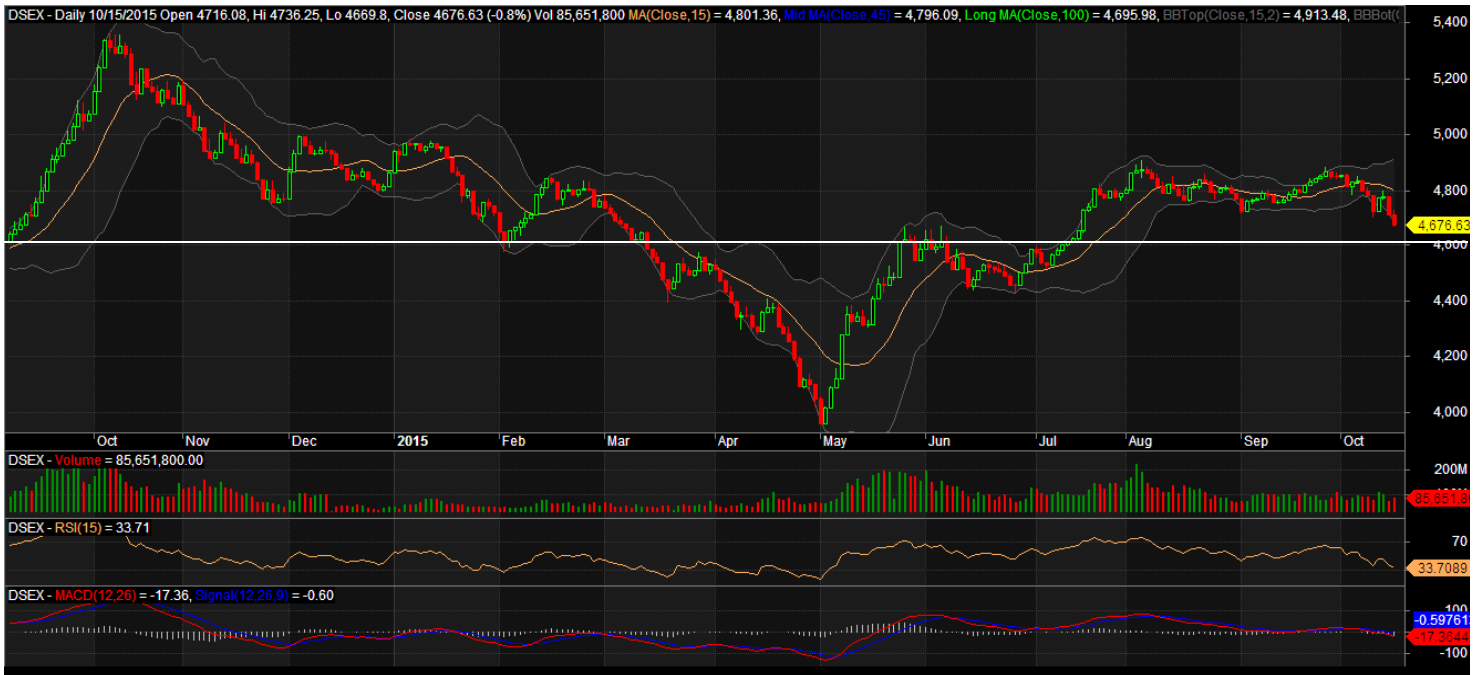
(Continuation news of TOSRIFA): II. The Company has also informed that it has signed a land lease agreement with Northern Knit Limited to take lease a land area of 24.80 bigha adjacent area to the proposed project for 25 years. The total rental amount of it will be Tk. 14,85,520.00 (approx.) at different time phases (end).

## Recent Dividend Declaration

Ticker	Dividend	Record Date
Beach Hatchery Ltd.	5%B	28.10.15
Premier Cement Mills Limited	20%C	18.10.15

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

## DSEX Technical Graph for last one year



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