

# Today's Market Overview

Thursday, November 26, 2015

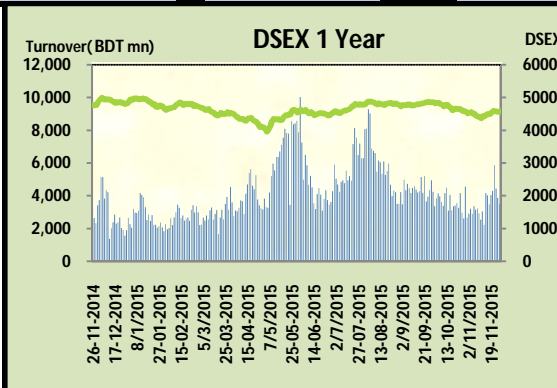


<b>DSEX</b>	4,573.75	0.13%	<b>Issues Traded</b>	↑ <b>Advanced</b> 136	↓ <b>Declined</b> 129	↔ <b>Unchanged</b> 48
<b>Turnover (BDT mn)</b>	3,482.77	-10.20%				

Market broke the losing streak with marginal gain after three days of fall though the volume was sluggish and dived below 3.5 billion mark. The premier bourse of the nation opened with positive mood and continued the same mood till the midsession. Soon after the midsession market started to mow down with sale pressure of some stocks which actually prevailed last couple of days in positive momentum, last hour buoyancy somehow managed to push back it in the positive zone. Market observed slight buoyancy in some big cap stocks which actually helped to close the market in green zone. Specially Bank, Telecom & Pharmaceuticals got some concentration while investors from NBF, Power, Engineering sectors shown some selling binge. Most of the active investors were busy in choppy trading while rests of them were out of the fence to observe the market behavior as resistance level has been tested for several times. Other two indices DS30 & DSES the shariah based index both performed marginally positive.

The general gauge DSEX ended at 4573.75 with an advance of +0.1% which added only 5.74 points to the broad DSEX. The Turnover declined heavily by -10.2% which was 396 Million BDT poorer than that of previous day and finally finished the mark at 3482.77 million BDT. A total of 136 issues advanced with 129 declined and 48 remained unchanged. Sectors that improved were: Bank (+0.2%) Food (+0.7%) Pharmaceuticals (+0.2%) Telecom (+0.5%) IT (+0.5%) Insurance (+0.8%) Mutual Fund (+1.2%) & sectors that declined were: Cement (-0.1%) Ceramics (-0.5%) Engineering (-0.3%) NBF (-1.7%) Power (-0.6%) Service (-0.7%) Travel (-0.8) Miscellaneous (-0.2%)

ALARABANK topped in the Volume chart with a turnover of 17.52 BDT crore. ISNLTD ranked top gainer chart with a price hike of +8.7% and JANATAINS topped in the loser chart with a decline of -9.8% from its prevailing price. GP led the way in the index mover chart while LAFSURCEML played the shatter part.



Index Scenario				Market Highlights				
INDEX	Change	% Changes		DSEX 52 week H/L	4992/3960	Market P/E (LTM)	14.80	
DSEX	4573.75	5.74	0.1%	DSEX Week H/L	4597/4568	M.Cap (mn)	3150590.2	
DSES	1101.16	2.67	0.2%	Group Performances				
DS30	1729.64	1.69	0.1%	Category	Mkt Cap (mn.)	Δ % M.Cap	Turnover BDT (mn)	Δ % Turnover
Turnover Scenario				Group A	2,437,767.81	0.1%	3,006.41	-7.5%
Today's Turnover (mn.)	Change In BDT (mn.)	% Change		Group B	12,917.30	-0.8%	55.73	3.9%
3482.77	(396)	-10.2%		Group N	33,874.67	0.2%	354.94	-21.7%
				Group Z	23,343.97	0.2%	26.37	0.3%

Top Ten Volume (in BDT. crore)										
Stock	TT	YT	AT	% Δ in Turnover	TT/AT	CP	YP	% Δ P	Number of shares	Public Holding
ALARABANK	17.52	12.68	3.19	38.2%	449.5%	16.4	15.9	3.1%	946,958,501.0	47%
QSM DRYCELL	12.95	8.45	7.94	53.3%	63.1%	98.7	103.4	-4.5%	36,799,488.0	54%
SAIFPOWER	12.00	12.02	12.15	-0.1%	-1.2%	71.5	72.4	-1.2%	91,571,140.2	19%
IFADAUTOS	11.29	18.63	19.82	-39.4%	-43.0%	107.2	109.1	-1.7%	149,500,000.0	17%
SQURPHARMA	10.58	10.77	9.50	-1.8%	11.4%	251.3	249.7	0.6%	623,586,546.0	9%
AFCAGRO	9.35	9.93	3.78	-5.8%	147.5%	70.8	68.6	3.2%	63,250,000.0	57%
FARCHEM	9.33	10.09	4.71	-7.5%	98.2%	33.1	31.9	3.8%	136,547,347.5	12%
KDSALTD	9.18	13.71	8.60	-33.1%	6.8%	80.9	81.9	-1.2%	52,000,000.0	21%
ACTIVEFINE	8.94	1.49	1.90	498.3%	369.4%	57.9	56	3.4%	99,360,000.0	77%
RSRMSTEEL	8.82	4.37	2.35	101.9%	276.0%	52	49.6	4.8%	78,624,000.0	41%

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
ISNLTD	15	13.8	11.205	8.7%	33.9%	JANATAINS	12.00	13.30	11.70	-9.8%	2.6%
ICB1STNRB	18.8	17.4	17.695	8.0%	6.2%	AAMRATECH	25.20	26.90	26.82	-6.3%	-6.0%
2NDICB	298.6	276.5	272.295	8.0%	9.7%	QSMRDYCELI	98.70	103.40	87.90	-4.5%	12.3%
OAL	37	34.3	32.575	7.9%	13.6%	IPDC	29.50	30.90	26.20	-4.5%	12.6%
MICEMENT	77.9	73	68.53	6.7%	13.7%	DBH	110.00	114.90	99.06	-4.3%	11.0%
1STPRIMFMF	11.7	11	9.89	6.4%	18.3%	PRAGATHINS	24.20	25.20	25.02	-4.0%	-3.3%
TALLUSPIN	19.8	18.7	19.53	5.9%	1.4%	ISLAMICFIN	15.00	15.60	14.20	-3.8%	5.7%
KBPPWBIL	22.4	21.3	22.37	5.2%	0.1%	MONNOCERA	33.50	34.80	35.70	-3.7%	-6.2%
SALAMCRST	29	27.6	27.28	5.1%	6.3%	NLTUBES	88.90	92.30	99.98	-3.7%	-11.1%
RSRMSTEEL	52	49.6	51.715	4.8%	0.6%	UNITEDFIN	21.60	22.40	19.14	-3.6%	12.9%

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	43.69	35.55	0.13	0.09	22.9%	40861.46	40796.01	16.31%	16.30%	0.2%	
Cement	11.99	13.79	0.03	0.04	-13.0%	15540.30	15551.69	6.20%	6.21%	-0.1%	
Ceramics	2.43	2.62	0.01	0.01	-7.0%	2616.92	2629.91	1.04%	1.05%	-0.5%	
Engineering	70.18	74.83	0.20	0.20	-6.2%	15199.15	15246.64	6.07%	6.09%	-0.3%	
Food & Allied Product	17.46	17.90	0.05	0.05	-2.5%	24015.37	23854.45	9.59%	9.53%	0.7%	
Insurance	6.02	5.06	0.02	0.01	19.0%	6829.73	6778.31	2.73%	2.71%	0.8%	
IT	5.48	2.20	0.02	0.01	148.9%	500.20	497.52	0.20%	0.20%	0.5%	
Jute	0.53	0.80	0.00	0.00	-34.1%	84.95	83.84	0.03%	0.03%	1.3%	
Miscellaneous	14.14	15.17	0.04	0.04	-6.8%	8009.53	8024.45	3.20%	3.21%	-0.2%	
Mutual Fund	6.02	4.79	0.02	0.01	25.7%	3538.15	3495.29	1.41%	1.40%	1.2%	
NBFI	24.22	38.48	0.07	0.10	-37.1%	8473.60	8616.39	3.38%	3.44%	-1.7%	
Paper & Printing	0.83	1.13	0.00	0.00	-26.3%	170.79	172.28	0.07%	0.07%	-0.9%	
Pharmaceuticals & Chemicals	57.85	59.34	0.17	0.16	-2.5%	40261.61	40181.51	16.07%	16.05%	0.2%	
Power & Energy	34.27	46.35	0.10	0.12	-26.0%	34084.12	34273.30	13.61%	13.69%	-0.6%	
Service & Real Estate	13.63	14.45	0.04	0.04	-5.7%	1993.71	2008.06	0.80%	0.80%	-0.7%	
Tannery	1.81	1.49	0.01	0.00	21.5%	2407.48	2413.85	0.96%	0.96%	-0.3%	
Telecommunication	4.90	3.88	0.01	0.01	26.4%	36073.87	35882.87	14.40%	14.33%	0.5%	
Textile	24.64	33.16	0.07	0.09	-25.7%	7719.71	7722.53	3.08%	3.08%	0.0%	
Travel & Leisure	2.69	5.02	0.01	0.01	-46.4%	2100.13	2116.65	0.84%	0.85%	-0.8%	

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 (Fd.)			
GP	LAFSURCEML	Bank	9.52	NBFI	40.14
OLYMPIC	DBH	Cement	34.50	Paper & Printing	61.31
SQURPHARMA	POWERGRID	Ceramics	43.60	Pharmaceuticals & Chemicals	27.61
MICEMENT	UPGDCL	Engineering	28.79	Power & Energy	15.61
ALARABANK	ACI	Food & Allied Product	30.86	Service & Real Estate	39.64
DELTALIFE	DUTCHBANGL	Insurance	14.56	Tannery	50.66
OAL	ISLAMIBANK	IT	22.20	Telecommunication	26.30
NATLIFEINS	IFADAUTOS	Jute	59.49	Textile	21.36
HEIDELBCEM	SUMITPOWER	Miscellaneous	35.18	Travel & Leisure	18.46
PRIMEBANK	DESCO				

## Important News

### Company News:

**TRUSTBANK:** Formation of a subsidiary company (additional information): With reference to their earlier news (disseminated by DSE on 25.11.2015), regarding formation of a subsidiary company, the company has further informed that the proposed subsidiary company "Trust Axiata Digital Limited" will be formed with an authorized capital of Tk. 5.00 crore.

**LINDEBD:** Investment Approval: The Company has informed that the Board of Directors of the Company has approved total investment of Tk. 1,237.00 million for a new ASU plant at Rugganj, Bangladesh with total production capacity of around 100 TPD. Projected investment of Tk. 1,237.00 million is to be funded from the Company's own fund at this stage. Expected date of commercialization is by 1st January 2018.

## Recent Dividend Declaration

Ticker	Dividend	Record Date
Shahjibazar Power Co. Ltd.	28% C & 3% B	07.12.15
Aftab Automobiles	C (for General Shareholders)	06.12.15
Knitting & Dyeing Industries I	5% C & 10% B	06.12.15
Meghna Petroleum Limited	105% C	22.12.15
Jamuna Oil Company Limited	100% C	28.12.15

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

## DSEX Technical Graph for last one year



## MTB CAPITAL LIMITED

Corporate head office

Level: 3, MTB Tower, 111, Kazi Nazrul Islam Avenue, Dhaka

Phone: 8321714, Fax: 8321543

[www.mtbcap.com](http://www.mtbcap.com)

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