

Today's Market Overview

Monday, August 24, 2015

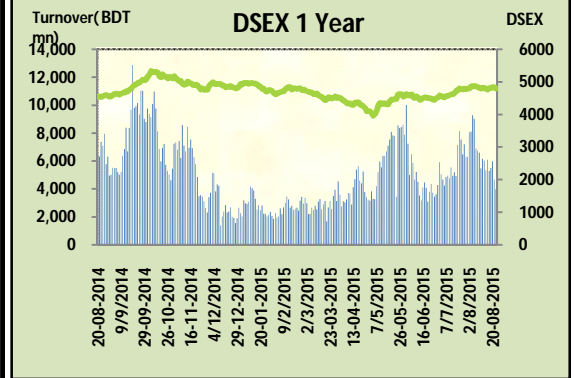


DSEX	4,794.00	-0.78%	Issues Traded	Advanced	Declined	Unchanged
Turnover (BDT mn)	3,993.50	-14.62%		68	211	40

Market slipped below the 4800 mark after four trading sessions with a very sluggish turnover. Turnover couldn't break the 4 Billion mark which was lowest in last thirty six trading days. The premier bourse of the nation opened with a positive mood but first hour's poor turnover really perplexed the investors, soon after the first hour investors intensified their selling bender with fear of further fall in the market. Last hour's sale pressure dominated heavily the buy pressure thus pushed the market closed in dip red. All the major & prominent sectors failed to gain. Other two indices DS30 & DSES the shariah based index both performed very poor. Service was the worst loser followed by NBFI & Bank.

The general gauge DSEX ended at 4795 with a decline of -0.8% which cut 37.72 points from the broad DSEX. The Turnover declined heavily by -14.6% which was 684 Million BDT poorer than that of previous day and finally finished the mark at 3993.5 million BDT. A total of 68 issues advanced with 211 declined and 40 remained unchanged. There was no gaining sector today & sectors that declined heavily were: Bank (-1.2%) Cement (-0.3%) ceramics (-1.2%) Engineering (-1.0%) NBFI (-1.3%) Pharmaceuticals (-0.3%) Power (-0.9%) Service (-1.7%) Textiles (-0.8%) Telecom (-0.3%) Jute (-4.9%).

SPCL topped in the Volume chart with a turnover of 24.95 BDT crore. ZEALBANGLA ranked top gainer chart with a price hike of +9.5% and NORTHERN topped in the loser chart with a decline of -8.2% from its prevailing price. GLAXOSMITH 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)	15.94	
	DSEX	4794.00	(37.72)	DSEX Week H/L	4840/4768	M.Cap (mn)	3350306.6	
	DSES	1178.03	(6.95)	Group Performances				
	DS30	1832.06	(12.17)	Category	Mkt Cap (mn.)	Δ % M.Cap	Turnover BDT (mn)	Δ % Turnover
	Turnover Scenario			Group A	2,628,498.83	-0.7%	3,556.83	-17.4%
	Today's Turnover (mn.)	Change In BDT (mn.)	% Change	Group B	13,553.06	-1.1%	50.65	-33.8%
	3993.50	(684)	-14.6%	Group N	25,833.24	-0.4%	160.10	-11.8%
				Group Z	24,741.08	-1.1%	56.86	23.9%

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	24.95	25.78	16.74	-3.2%	49.0%	194.1	199	-2.5%	133,137,900.0	19%
SQURPHARMA	17.69	12.81	20.61	38.1%	-14.2%	245.4	246.2	-0.3%	623,586,546	9%
ISLAMIBANK	14.19	10.32	17.26	37.5%	-17.8%	30.1	30.1	0.0%	1,609,990,668.00	21%
LAFSURCEML	14.07	14.82	21.17	-5.1%	-33.6%	114	114.3	-0.3%	1,161,373,500.00	30%
UPGDCL	9.52	10.04	25.13	-5.2%	-62.1%	155.3	157.1	-1.1%	362,944,698.60	5%
APEXFOODS	8.40	3.40	2.79	147.1%	200.9%	159.4	172.4	-7.5%	5,702,400.00	30%
QSMRDYCELL	7.85	4.09	6.85	92.0%	14.7%	74.1	72.1	2.8%	36,799,488.00	54%
BXPHERMA	7.46	2.90	12.12	157.4%	-38.5%	65.3	65.5	-0.3%	386,244,234.60	50%
GP	6.42	5.24	10.97	22.6%	-41.5%	317.2	318	-0.3%	1,350,300,022.00	4%
RSRMSTEEL	6.39	7.76	12.43	-17.6%	-48.6%	64.4	65.1	-1.1%	65,520,000.00	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
ZEALBANGLA	6.9	6.3	6.8	9.5%	1.5%	NORTHERN	322.60	351.30	268.67	-8.2%	20.1%
MODERNDYE	77.9	75	72.725	3.9%	7.1%	APEXFOODS	159.40	172.40	140.65	-7.5%	13.3%
NFML	25.2	24.4	24.39	3.3%	3.3%	FBFIF	7.20	7.70	7.80	-6.5%	-7.7%
SHASHADNIM	44	42.8	44.555	2.8%	-1.2%	PRIMEICBA	5.00	5.30	5.02	-5.7%	-0.3%
QSMDRYCELL	74.1	72.1	66.45	2.8%	11.5%	ICBIBANK	4.40	4.60	4.34	-4.3%	1.4%
MEGCONMILK	7.7	7.5	7.28	2.7%	5.8%	APEXSPINN	80.40	83.80	76.78	-4.1%	4.7%
IBNSINA	131.6	128.4	116.96	2.5%	12.5%	UNIONCAP	13.80	14.30	14.92	-3.5%	-7.5%
BSC	400.7	391.1	391.165	2.5%	2.4%	PREMIERLEA	8.50	8.80	9.01	-3.4%	-5.7%
NCCBLMF1	4.3	4.2	4.355	2.4%	-1.3%	WATACHEM	170.60	176.60	171.21	-3.4%	-0.4%
MBL1STMF	4.4	4.3	4.605	2.3%	-4.5%	IFIC	23.00	23.80	20.81	-3.4%	10.5%

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	49.90	73.30	0.13	0.16	-31.9%	40518.78	40995.09	15.07%	15.15%	-1.2%
Cement	16.44	20.11	0.04	0.04	-18.2%	19367.60	19420.02	7.21%	7.18%	-0.3%
Ceramics	4.30	3.60	0.01	0.01	19.5%	2834.23	2869.84	1.05%	1.06%	-1.2%
Engineering	55.01	69.19	0.15	0.15	-20.5%	14995.22	15152.79	5.58%	5.60%	-1.0%
Food & Allied Product	19.97	23.84	0.05	0.05	-16.2%	23872.96	23999.89	8.88%	8.87%	-0.5%
Insurance	6.96	5.92	0.02	0.01	17.6%	7220.88	7265.62	2.69%	2.68%	-0.6%
IT	3.68	4.08	0.01	0.01	-9.8%	559.12	560.73	0.21%	0.21%	-0.3%
Jute	0.62	0.92	0.00	0.00	-32.4%	102.86	108.16	0.04%	0.04%	-4.9%
Miscellaneous	16.45	9.87	0.04	0.02	66.7%	8234.47	8267.71	3.06%	3.06%	-0.4%
Mutual Fund	6.19	9.07	0.02	0.02	-31.8%	3307.50	3345.93	1.23%	1.24%	-1.1%
NBFI	11.00	16.17	0.03	0.04	-32.0%	7951.06	8058.07	2.96%	2.98%	-1.3%
Paper & Printing	0.55	0.77	0.00	0.00	-28.0%	222.16	226.03	0.08%	0.08%	-1.7%
Pharmaceuticals & Chemicals	55.63	64.19	0.15	0.14	-13.3%	40336.89	40466.72	15.01%	14.95%	-0.3%
Power & Energy	67.65	71.49	0.18	0.16	-5.4%	38848.54	39203.37	14.45%	14.49%	-0.9%
Service & Real Estate	6.85	12.12	0.02	0.03	-43.5%	1988.24	2022.34	0.74%	0.75%	-1.7%
Tannery	7.24	14.05	0.02	0.03	-48.4%	2522.57	2540.05	0.94%	0.94%	-0.7%
Telecommunication	7.81	8.22	0.02	0.02	-4.9%	44801.39	44919.91	16.67%	16.60%	-0.3%
Textile	33.75	41.62	0.09	0.09	-18.9%	8729.39	8803.43	3.25%	3.25%	-0.8%
Travel & Leisure	6.57	5.77	0.02	0.01	13.9%	2378.40	2399.82	0.88%	0.89%	-0.9%

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			
GLAXOSMITH	GP	Bank	8.76	NBFI	31.75
SHASHADNIM	BATBC	Cement	40.97	Paper & Printing	62.62
BSC	TITASGAS	Ceramics	37.84	Pharmaceuticals & Chemicals	26.08
SOUTHEASTB	UPGDCL	Engineering	37.60	Power & Energy	16.59
BANKASIA	SPCL	Food & Allied Product	33.98	Service & Real Estate	42.03
DBH	UCBL	Insurance	14.38	Tannery	32.95
NTC	SQURPHARMA	IT	17.97	Telecommunication	28.50
QSMDRYCELL	OLYMPIC	Jute	170.73	Textile	17.95
IBNSINA	CITYBANK	Miscellaneous	37.87	Travel & Leisure	15.41
SAIHAMCOT	PRIMEBANK				

Important News

Company News:

APEXFOODS: Dividend Declaration: The Board of Directors has recommended 20% cash dividend for the year ended on June 30, 2015. Date of AGM: 30.09.2015, Time: 11:00 AM, Venue: Trust Milonayaton, 545, Puraton Biman Bandar Sarak (Adjacent to Shahid Bir Shresta Jahangir Gate), Dhaka Cantonment, Dhaka-1206. Record date: 13.09.2015. (Cont. 1)

(Continuation news of APEXFOODS): The Company has also reported net profit after tax of Tk. 84.84 million, EPS with fair valuation surplus/(deficit) of Investment of Tk. 12.60, EPS without fair valuation surplus/(deficit) of Investment of Tk. 14.88, NAV per share of Tk. 109.16 and NOCFPS of Tk. (6.64) for the year ended on June 30, 2015 as against Tk. 17.04 million, Tk. 9.55, Tk. 2.99, Tk. 98.56 and Tk. 19.66 respectively for the year ended on June 30, 2014.(end)

BSEC NEWS: Due to unavoidable circumstances, the subscription schedule of IPO of Simtex Industries Limited has been postponed by Bangladesh Securities and Exchange Commission (BSEC). The New schedule of subscription will be notified later.

Recent Dividend Declaration

Ticker	Dividend	Record Date
National Bank Limited	10% B	30.08.15
Tosrifa Industries Limited	5% C & 7% B	30.08.15
Southeast Bank 1st Mutual Fund	12.50% C	31.08.15
NLI First Mutual Fund	13% C	31.08.15
Asian Tiger Sandhani Life Growth Fund	7.50% C & 2.50% RIU	01.09.15
Aims 1st Mutual Fund	175% 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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