

# Today's Market Overview

Monday, October 05, 2015

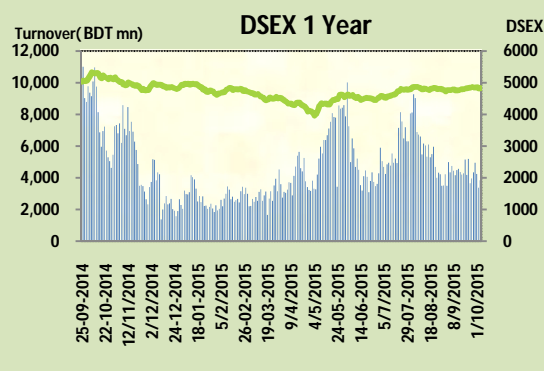


|                          |          |              |                      |                 |                 |                  |
|--------------------------|----------|--------------|----------------------|-----------------|-----------------|------------------|
| <b>DSEX</b>              | 4,831.60 | <b>0.35%</b> | <b>Issues Traded</b> | <b>Advanced</b> | <b>Declined</b> | <b>Unchanged</b> |
| <b>Turnover (BDT mn)</b> | 3,846.22 | <b>14.2%</b> |                      | 126             | 148             | 44               |

Market witnessed a huge fall and gain today with a slightly improved turnover. Increased participation from some prominent sectors actually helped to recover the initial debacle. Market opened with a huge sale pressure from some big cap stocks mostly from GP and plunged the market almost 31 points but sensible participation from Banking sector investors pulled it back to the green zone and closed with gain. Other two indices DS30 & DSES the shariah based index both performed positive. Most of the major sectors put a mixed show. Bank & Miscellaneous got the buoyancy while Telecom & Mutual Fund got the supply glut.

The general gauge DSEX ended at 4831.60 with a decline of +0.4% which added 16.99 points to the broad DSEX. The Turnover advanced slightly by +14.2% which was only 478 Million BDT healthier than that of previous day and finally finished the mark at 3846.22 million BDT. A total of 126 issues advanced with 148 declined and 44 remained unchanged. Sectors that improved were Bank (+1.4%) Ceramics (+0.5%) Engineering (+0.8%) Miscellaneous (+1.4%) Power (+0.3%) & sectors that declined were: Telecom (-2.0%) NBFI (-0.4%) Travel (-0.7%) Service (-0.9%) Mutual Fund (1.0%)

BXPHERMA topped in the Volume chart with a turnover of 25.18 BDT crore. ICB1STNRB ranked top gainer chart with a price hike of +8.00% and EXIM1STMF topped in the loser chart with a decline of -7.1% from its prevailing price. BRACBANK 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) | 15.79      |                   |              |
|--------------------------|---------------------|-----------|------------------|---------------------------|------------------|------------|-------------------|--------------|
| DSEX                     | 4831.60             | 16.99     | 0.4%             | DSEX Week H/L             | 4857/4814        | M.Cap (mn) | 3334704.5         |              |
| DSES                     | 1170.91             | 0.80      | 0.1%             | <b>Group Performances</b> |                  |            |                   |              |
| DS30                     | 1840.17             | 5.56      | 0.3%             | Category                  | Mkt Cap (mn.)    | Δ % M.Cap  | Turnover BDT (mn) | Δ % Turnover |
| <b>Turnover Scenario</b> |                     |           |                  | Group A                   | 2,606,771.03     | -0.1%      | 3,507.69          | 14.3%        |
| Today's Turnover (mn.)   | Change In BDT (mn.) | % Change  | Group B          | 14,259.47                 | -0.1%            | 73.68      | -10.7%            |              |
| 3846.22                  | 478                 | 14.2%     | Group N          | 29,486.35                 | 1.5%             | 131.17     | -24.3%            |              |
|                          |                     |           | Group Z          | 25,174.36                 | 0.2%             | 32.79      | -2.3%             |              |

## Top Ten Volume (in BDT. crore)

| Stock      | TT    | YT    | AT    | % Δ in Turnover | TT/AT  | CP    | YP    | % Δ P | Number of shares | Public Holding |
|------------|-------|-------|-------|-----------------|--------|-------|-------|-------|------------------|----------------|
| BXPHERMA   | 25.17 | 6.36  | 11.37 | 295.8%          | 121.4% | 74    | 72    | 2.8%  | 386,244,234.6    | 50%            |
| BRACBANK   | 16.00 | 2.61  | 2.31  | 513.6%          | 593.4% | 44.4  | 42.5  | 4.5%  | 709,287,321.0    | 46%            |
| GP         | 14.86 | 7.03  | 8.91  | 111.3%          | 66.7%  | 276.1 | 281.7 | -2.0% | 1,350,300,022.0  | 4%             |
| SQURPHARMA | 10.57 | 8.14  | 11.42 | 29.9%           | -7.4%  | 247.8 | 247.8 | 0.0%  | 623,586,546.0    | 9%             |
| FARCHEM    | 9.92  | 16.08 | 10.79 | -38.3%          | -8.1%  | 45.9  | 46    | -0.2% | 109,237,878.0    | 12%            |
| SAIFPOWER  | 9.80  | 15.59 | 8.33  | -37.1%          | 17.6%  | 91.8  | 92.5  | -0.8% | 70,985,380.0     | 19%            |
| IDLC       | 9.61  | 5.73  | 5.78  | 67.7%           | 66.3%  | 62.2  | 62.6  | -0.6% | 251,367,187.5    | 22%            |
| ISLAMIBANK | 8.88  | 2.85  | 9.24  | 211.4%          | -3.9%  | 30    | 29.5  | 1.7%  | 1,609,990,668.0  | 21%            |
| BSRMSTEEL  | 8.43  | 6.79  | 8.39  | 24.2%           | 0.6%   | 94.9  | 92.8  | 2.3%  | 341,775,000.0    | 13%            |
| LAFSURCEML | 8.23  | 8.28  | 9.83  | -0.6%           | -16.3% | 106.1 | 106   | 0.1%  | 1,161,373,500.0  | 30%            |

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 |
| ICB1STNRB      | 18.8  | 17.4  | 18.305  | 8.0%  | 2.7%             | EXIMISTMF     | 5.20   | 5.60   | 5.26   | -7.1% | -1.1%            |
| GREENDELMF     | 4.9   | 4.6   | 4.555   | 6.5%  | 7.6%             | KAY&QUE       | 14.00  | 14.90  | 14.34  | -6.0% | -2.3%            |
| AMANFEED       | 62.8  | 59.7  | 68.58   | 5.2%  | -8.4%            | JUTESPINN     | 55.10  | 58.60  | 62.21  | -6.0% | -11.4%           |
| BRACBANK       | 44.4  | 42.5  | 39.875  | 4.5%  | 11.3%            | ZEALBANGLA    | 7.10   | 7.50   | 7.66   | -5.3% | -7.3%            |
| SOUTHEASTB     | 17.6  | 17    | 17.02   | 3.5%  | 3.4%             | STANDARINS    | 16.50  | 17.40  | 16.31  | -5.2% | 1.2%             |
| BSRMLTD        | 131.1 | 126.7 | 125.385 | 3.5%  | 4.6%             | MODERNDYE     | 166.70 | 174.90 | 157.71 | -4.7% | 5.7%             |
| RAHIMAFOOD     | 52.8  | 51.1  | 49.45   | 3.3%  | 6.8%             | TALLUSPIN     | 22.50  | 23.40  | 22.58  | -3.8% | -0.4%            |
| SONARBAINS     | 16.7  | 16.2  | 16.855  | 3.1%  | -0.9%            | PRIMEINSUR    | 15.30  | 15.90  | 15.78  | -3.8% | -3.0%            |
| DAFODILCOM     | 17.7  | 17.2  | 17.4    | 2.9%  | 1.7%             | EASTLAND      | 22.20  | 23.00  | 22.63  | -3.5% | -1.9%            |
| BXPHERMA       | 74    | 72    | 70.015  | 2.8%  | 5.7%             | GBBPOWER      | 17.50  | 18.10  | 17.99  | -3.3% | -2.7%            |

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   | 59.93        | 24.57     | 0.16           | 0.07      | 143.9%          | 41447.13              | 40856.38  | 15.51%        | 15.29%    | 1.4%      |  |
| Cement   | 15.83        | 18.32     | 0.04           | 0.05      | -13.6%          | 18908.48              | 18875.03  | 7.08%         | 7.06%     | 0.2%      |  |
| Ceramics   | 3.55         | 5.53      | 0.01           | 0.02      | -35.8%          | 2761.06               | 2748.57   | 1.03%         | 1.03%     | 0.5%      |  |
| Engineering  | 44.90        | 49.35     | 0.12           | 0.15      | -9.0%           | 15373.91              | 15245.64  | 5.75%         | 5.70%     | 0.8%      |  |
| Food & Allied Product                              | 15.14        | 12.06     | 0.04           | 0.04      | 25.6%           | 24213.92              | 24404.24  | 9.06%         | 9.13%     | -0.8%     |  |
| Insurance  | 5.00         | 4.38      | 0.01           | 0.01      | 14.1%           | 7212.64               | 7238.34   | 2.70%         | 2.71%     | -0.4%     |  |
| IT   | 1.50         | 2.13      | 0.00           | 0.01      | -29.7%          | 552.00                | 552.74    | 0.21%         | 0.21%     | -0.1%     |  |
| Jute   | 0.35         | 0.29      | 0.00           | 0.00      | 20.7%           | 99.74                 | 100.02    | 0.04%         | 0.04%     | -0.3%     |  |
| Miscellaneous                                      | 13.82        | 17.22     | 0.04           | 0.05      | -19.7%          | 9021.07               | 8896.22   | 3.38%         | 3.33%     | 1.4%      |  |
| Mutual Fund  | 6.83         | 9.61      | 0.02           | 0.03      | -29.0%          | 3521.50               | 3556.03   | 1.32%         | 1.33%     | -1.0%     |  |
| NBFI   | 25.77        | 21.73     | 0.07           | 0.06      | 18.6%           | 8501.03               | 8538.02   | 3.18%         | 3.19%     | -0.4%     |  |
| Paper & Printing                                   | 0.61         | 1.23      | 0.00           | 0.00      | -50.8%          | 224.25                | 224.35    | 0.08%         | 0.08%     | 0.0%      |  |
| Pharmaceuticals & Chemicals                        | 71.41        | 58.64     | 0.19           | 0.18      | 21.8%           | 41809.09              | 41813.57  | 15.65%        | 15.64%    | 0.0%      |  |
| Power & Energy                                     | 40.43        | 38.57     | 0.11           | 0.12      | 4.8%            | 39085.40              | 38977.22  | 14.63%        | 14.58%    | 0.3%      |  |
| Service & Real Estate                              | 17.27        | 25.20     | 0.05           | 0.08      | -31.5%          | 2167.08               | 2186.51   | 0.81%         | 0.82%     | -0.9%     |  |
| Tannery  | 5.75         | 4.69      | 0.02           | 0.01      | 22.5%           | 2590.42               | 2584.84   | 0.97%         | 0.97%     | 0.2%      |  |
| Telecommunication                                  | 16.27        | 8.32      | 0.04           | 0.02      | 95.5%           | 38908.35              | 39684.01  | 14.56%        | 14.85%    | -2.0%     |  |
| Textile  | 23.45        | 24.85     | 0.06           | 0.07      | -5.6%           | 8433.45               | 8452.78   | 3.16%         | 3.16%     | -0.2%     |  |
| Travel & Leisure                                   | 7.23         | 8.08      | 0.02           | 0.02      | -10.5%          | 2342.39               | 2359.46   | 0.88%         | 0.88%     | -0.7%     |  |

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       |        |                             |       |
|--------------|---------------|-----------------------|--------|-----------------------------|-------|
| BRACBANK     | GP            | Bank                  | 9.02   | NBFI                        | 34.27 |
| BERGERPBL    | BATBC         | Cement                | 37.11  | Paper & Printing            | 77.64 |
| ISLAMIBANK   | MARICO        | Ceramics              | 38.43  | Pharmaceuticals & Chemicals | 27.63 |
| BXPHERMA     | GLAXOSMITH    | Engineering           | 38.55  | Power & Energy              | 16.56 |
| BSRMLTD      | UPGDCL        | Food & Allied Product | 34.98  | Service & Real Estate       | 45.32 |
| BSRMSTEEL    | BSCCL         | Insurance             | 14.48  | Tannery                     | 35.24 |
| TITASGAS     | RENATA        | IT                    | 17.77  | Telecommunication           | 24.08 |
| SOUTHEASTB   | UNIQUEHRL     | Jute                  | 167.22 | Textile                     | 17.37 |
| DESCO        | DELTALIFE     | Miscellaneous         | 35.23  | Travel & Leisure            | 15.12 |
| PRIMEBANK    | FBFIF         |                       |        |                             |       |

**Important News****Company News:**

QSM DRYCELL: Dividend Declaration: The Board of Directors has recommended 10% stock dividend for the year ended on June 30, 2015. Date of AGM: 26.11.2015, Time: 10:30 AM, Venue: Hall - 2, RAOWA Complex, Mohakhali, Dhaka. Record Date: 22.10.2015. The Company has also reported EPS of Tk. 1.52, NAV per share of Tk. 49.99 and NOCFPS of Tk. 2.75 for the year ended on June 30, 2015.

**Recent Dividend Declaration**

| Ticker                        | Dividend     | Record Date |
|-------------------------------|--------------|-------------|
| Matin Spinning Mills Ltd.     | 27% C        | 08.10.15    |
| Premier Cement Mills Limited  | 20% C        | 18.10.15    |
| SAIF Powertec Limited         | 29% B        | 15.10.15    |
| Appollo Ispat Complex Limited | 3% C & 12% B | 14.10.15    |
| Beach Hatchery Ltd.           | 5% B         | 28.10.15    |

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

**DSEX Technical Graph for last one year****MTB CAPITAL LIMITED**

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