

# Today's Market Overview

Sunday, March 13, 2016

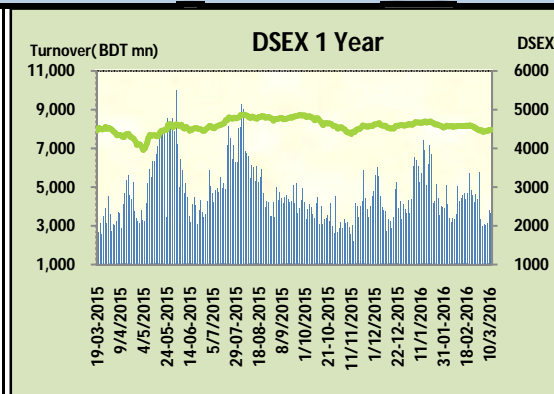


|                          |          |               |                      |                          |                          |                          |
|--------------------------|----------|---------------|----------------------|--------------------------|--------------------------|--------------------------|
| <b>DSEX</b>              | 4,480.18 | <b>-0.10%</b> | <b>Issues Traded</b> | ↑ <b>Advanced</b><br>119 | ↓ <b>Declined</b><br>151 | ↔ <b>Unchanged</b><br>46 |
| <b>Turnover (BDT mn)</b> | 3,678.23 | <b>-4.06%</b> |                      |                          |                          |                          |

Four days of gain defeated by marginal fall with a sluggish turnover. The premier bourse of the nation opened with Negative mood and continued the same mood till the closure but several recovery stances took place during the session. Most of the investors were busy in picking profit as some of the recent issues like exploitation in Bangladesh bank reserve, cancellation of cargo transportation with UK and failure in GSP issue with USA made investors nerve weaken. Most of the big caps stocks were indolence except Power & Telecom. Notable concentration occurred in Insurance, Pharmaceuticals & Telecom. Investors from Engineering & NBFI were very harsh and uncomfortable with their holdings. Most of the Small cap stocks performed well. Turnover somehow crossed 3.5 billion but midsession participation was very dull and didn't allow exceeding previous day's turnover. Other two indices DS30 & DSES the shariah based index were marginally positive. Service was the best gainer followed by IT & insurance While Engineering and NBFI frustrated the most.

The general gauge DSEX ended at 4480 with a decline of -0.10% which cut 4.35 points from the broad DSEX. The Turnover declined by -4.1% which was 156 Million BDT poorer than that of previous day and finally finished the mark at 3678.23 million BDT. A total of 119 issues advanced with 151 declined and 46 remained unchanged. Sectors that improved were: Cement (+0.1%) Insurance (+1.3%) IT (+1.7%) Power (+0.8%) Pharmaceuticals (+0.2%) Service (+1.8%) Telecom (+0.4%) & Sectors that declined were: Bank (-0.6%) Ceramics (-0.8%) Engineering (-2.0%) Food (-1.1%) NBFI(-1.6%) Textiles (-0.6%) Miscellaneous (-0.2%)

AMANFEED topped in the Volume chart with a turnover of 25.74 BDT crore. KEYACOSMETIC ranked top gainer chart with a price hike of +9.9% and UNITEDFIN topped in the loser chart with a decline of -12.4% from its prevailing price. TITASGAS led the way in the index mover chart while BATBC played the shatter part.



| Index Scenario                |                            |                 |                  | Market Highlights         |                      |                         |                          |                     |
|-------------------------------|----------------------------|-----------------|------------------|---------------------------|----------------------|-------------------------|--------------------------|---------------------|
|                               | <b>INDEX</b>               | <b>Change</b>   | <b>% Changes</b> | <b>DSEX 52 week H/L</b>   | 4992/3960            | <b>Market P/E (LTM)</b> | 14.10                    |                     |
|                               | <b>DSEX</b>                | 4480.18         | (4.35)           | <b>DSEX Week H/L</b>      | 4485/4443            | <b>M.Cap (mn)</b>       | 3107358.8                |                     |
|                               | <b>DSES</b>                | 1087.05         | 1.48             | <b>Group Performances</b> |                      |                         |                          |                     |
|                               | <b>DS30</b>                | 1721.53         | 0.46             | <b>Category</b>           | <b>Mkt Cap (mn.)</b> | <b>Δ % M.Cap</b>        | <b>Turnover BDT (mn)</b> | <b>Δ % Turnover</b> |
| <b>Turnover Scenario</b>      |                            |                 |                  | <b>Group A</b>            | 2,380,280.88         | -0.2%                   | 2,854.19                 | -11.9%              |
| <b>Today's Turnover (mn.)</b> | <b>Change In BDT (mn.)</b> | <b>% Change</b> |                  | <b>Group B</b>            | 11,958.87            | -1.0%                   | 53.71                    | -12.0%              |
| 3678.23                       | (156)                      | -4.1%           |                  | <b>Group N</b>            | 36,663.53            | 2.0%                    | 567.51                   | 31.2%               |
|                               |                            |                 |                  | <b>Group Z</b>            | 33,459.94            | 0.2%                    | 95.23                    | 136.1%              |

| Top Ten Volume (in BDT. crore) |       |       |       |                 |        |       |       |       |                  |                |
|--------------------------------|-------|-------|-------|-----------------|--------|-------|-------|-------|------------------|----------------|
| Stock                          | TT    | YT    | AT    | % Δ in Turnover | TT/AT  | CP    | YP    | % Δ P | Number of shares | Public Holding |
| AMANFEED                       | 25.74 | 21.01 | 10.10 | 22.5%           | 154.9% | 66.2  | 60.9  | 8.7%  | 80,000,000.0     | 23%            |
| LANKABAFIN                     | 16.74 | 11.40 | 19.25 | 46.9%           | -13.1% | 39.1  | 39.9  | -2.0% | 240,643,434.9    | 61%            |
| ORIONPHARM                     | 14.25 | 7.28  | 8.79  | 95.7%           | 62.1%  | 41.2  | 39.8  | 3.5%  | 234,000,000.0    | 44%            |
| CMCKAMAL                       | 10.85 | 11.45 | 8.56  | -5.2%           | 26.8%  | 21.3  | 22.2  | -4.1% | 96,811,412.6     | 59%            |
| BXPHERMA                       | 9.22  | 16.28 | 12.13 | -43.4%          | -24.0% | 84.9  | 86.3  | -1.6% | 386,244,234.6    | 50%            |
| BSCCL                          | 8.80  | 2.34  | 2.70  | 276.6%          | 225.8% | 110.6 | 107.4 | 3.0%  | 164,905,510.0    | 14%            |
| ITC                            | 8.36  | 5.53  | 4.33  | 51.4%           | 93.2%  | 55.6  | 52.9  | 5.1%  | 87,000,000.0     | 12%            |
| BSRMLTD                        | 8.12  | 10.36 | 22.19 | -21.6%          | -63.4% | 161.2 | 172.2 | -6.4% | 173,351,038.0    | 9%             |
| KDSALTD                        | 7.75  | 6.31  | 3.38  | 22.8%           | 129.4% | 71.8  | 69.7  | 3.0%  | 52,000,000.0     | 21%            |
| EMERALDOIL                     | 7.32  | 6.60  | 4.18  | 10.9%           | 75.3%  | 56.6  | 54.1  | 4.6%  | 54,285,000.0     | 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 |
| KEYACOSMET     | 12.2  | 11.1  | 11.685 | 9.9%  | 4.4%             | UNITEDFIN     | 17.70  | 20.20  | 20.38  | -12.4% | -13.2%           |
| AMANFEED       | 66.2  | 60.9  | 55.585 | 8.7%  | 19.1%            | BSRMLTD       | 161.20 | 172.20 | 179.68 | -6.4%  | -10.3%           |
| ZEALBANGLA     | 6.3   | 5.8   | 6.1    | 8.6%  | 3.3%             | EASTRNLUB     | 718.70 | 764.10 | 607.06 | -5.9%  | 18.4%            |
| KAY&QUE        | 20.3  | 18.9  | 20.175 | 7.4%  | 0.6%             | GEMINISEA     | 583.20 | 612.00 | 576.06 | -4.7%  | 1.2%             |
| PADMAOIL       | 184.4 | 173.3 | 166.03 | 6.4%  | 11.1%            | ARAMIT        | 430.30 | 450.90 | 473.54 | -4.6%  | -9.1%            |
| PRIMEINSUR     | 15.1  | 14.2  | 14.325 | 6.3%  | 5.4%             | ICBEPMF1S1    | 6.40   | 6.70   | 6.40   | -4.5%  | 0.1%             |
| REPUBLIC       | 15.3  | 14.5  | 15.22  | 5.5%  | 0.5%             | CMCKAMAL      | 21.30  | 22.20  | 19.71  | -4.1%  | 8.1%             |
| DELTA LIFE     | 113.2 | 107.3 | 107.34 | 5.5%  | 5.5%             | BIFC          | 10.30  | 10.70  | 11.09  | -3.7%  | -7.1%            |
| ITC            | 55.6  | 52.9  | 51.41  | 5.1%  | 8.2%             | IPDC          | 22.30  | 23.10  | 27.15  | -3.5%  | -17.9%           |
| EMERALDOIL     | 56.6  | 54.1  | 53.76  | 4.6%  | 5.3%             | 6THICB        | 61.80  | 64.00  | 63.01  | -3.4%  | -1.9%            |

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   | 19.87        | 26.41     | 0.06           | 0.07      | -24.8%          | 38185.79              | 38414.17  | 15.53%        | 15.60%    | -0.6%     |  |
| Cement   | 7.90         | 7.54      | 0.02           | 0.02      | 4.8%            | 14349.82              | 14330.76  | 5.84%         | 5.82%     | 0.1%      |  |
| Ceramics   | 4.54         | 5.52      | 0.01           | 0.01      | -17.6%          | 2656.24               | 2677.34   | 1.08%         | 1.09%     | -0.8%     |  |
| Engineering  | 52.87        | 64.43     | 0.15           | 0.17      | -17.9%          | 15115.18              | 15422.84  | 6.15%         | 6.26%     | -2.0%     |  |
| Food & Allied Product                              | 15.75        | 17.13     | 0.04           | 0.05      | -8.1%           | 23240.71              | 23499.04  | 9.45%         | 9.54%     | -1.1%     |  |
| Insurance  | 12.17        | 8.27      | 0.03           | 0.02      | 47.0%           | 7391.70               | 7296.87   | 3.01%         | 2.96%     | 1.3%      |  |
| IT   | 10.73        | 9.74      | 0.03           | 0.03      | 10.2%           | 986.01                | 969.55    | 0.40%         | 0.39%     | 1.7%      |  |
| Jute   | 0.56         | 0.91      | 0.00           | 0.00      | -39.2%          | 82.36                 | 82.05     | 0.03%         | 0.03%     | 0.4%      |  |
| Miscellaneous                                      | 43.59        | 58.84     | 0.12           | 0.16      | -25.9%          | 8393.84               | 8414.11   | 3.41%         | 3.42%     | -0.2%     |  |
| Mutual Fund  | 1.37         | 2.83      | 0.00           | 0.01      | -51.5%          | 3633.75               | 3662.73   | 1.48%         | 1.49%     | -0.8%     |  |
| NBFI   | 24.45        | 20.90     | 0.07           | 0.06      | 17.0%           | 8275.44               | 8410.77   | 3.37%         | 3.42%     | -1.6%     |  |
| Paper & Printing                                   | 0.35         | 0.45      | 0.00           | 0.00      | -23.4%          | 184.61                | 185.56    | 0.08%         | 0.08%     | -0.5%     |  |
| Pharmaceuticals & Chemicals                        | 54.99        | 48.78     | 0.16           | 0.13      | 12.7%           | 41350.68              | 41274.87  | 16.82%        | 16.76%    | 0.2%      |  |
| Power & Energy                                     | 43.88        | 46.41     | 0.12           | 0.12      | -5.5%           | 33424.27              | 33143.44  | 13.60%        | 13.46%    | 0.8%      |  |
| Service & Real Estate                              | 6.18         | 4.49      | 0.02           | 0.01      | 37.5%           | 1754.20               | 1722.48   | 0.71%         | 0.70%     | 1.8%      |  |
| Tannery  | 0.64         | 0.96      | 0.00           | 0.00      | -33.4%          | 2209.30               | 2219.08   | 0.90%         | 0.90%     | -0.4%     |  |
| Telecommunication                                  | 9.89         | 4.26      | 0.03           | 0.01      | 132.0%          | 34703.66              | 34569.87  | 14.12%        | 14.04%    | 0.4%      |  |
| Textile  | 39.94        | 40.45     | 0.11           | 0.11      | -1.3%           | 7909.51               | 7955.82   | 3.22%         | 3.23%     | -0.6%     |  |
| Travel & Leisure                                   | 2.64         | 3.13      | 0.01           | 0.01      | -15.5%          | 1960.24               | 1953.54   | 0.80%         | 0.79%     | 0.3%      |  |

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.) |        |                             |       |
|--------------|---------------|-----------------------|--------|-----------------------------|-------|
| TITASGAS     | BATBC         | Bank                  | 8.48   | NBFI                        | 40.35 |
| OLYMPIC      | BSRMLTD       | Cement                | 30.61  | Paper & Printing            | 98.83 |
| PADMAOIL     | BRACBANK      | Ceramics              | 34.89  | Pharmaceuticals & Chemicals | 27.37 |
| GP           | BSRMSTEEL     | Engineering           | 55.48  | Power & Energy              | 15.68 |
| DELTA LIFE   | SUMITPOWER    | Food & Allied Product | 29.74  | Service & Real Estate       | 31.45 |
| HEIDELBCEM   | BXPHARMA      | Insurance             | 13.06  | Tannery                     | 53.15 |
| BSCCL        | BEXIMCO       | IT                    | 101.02 | Telecommunication           | 27.44 |
| MPETROLEUM   | PUBALIBANK    | Jute                  | 150.61 | Textile                     | 16.96 |
| MJLBD        | UCB           | Miscellaneous         | 36.01  | Travel & Leisure            | 20.83 |
| GLAXOSMITH   | UPGDCL        |                       |        |                             |       |

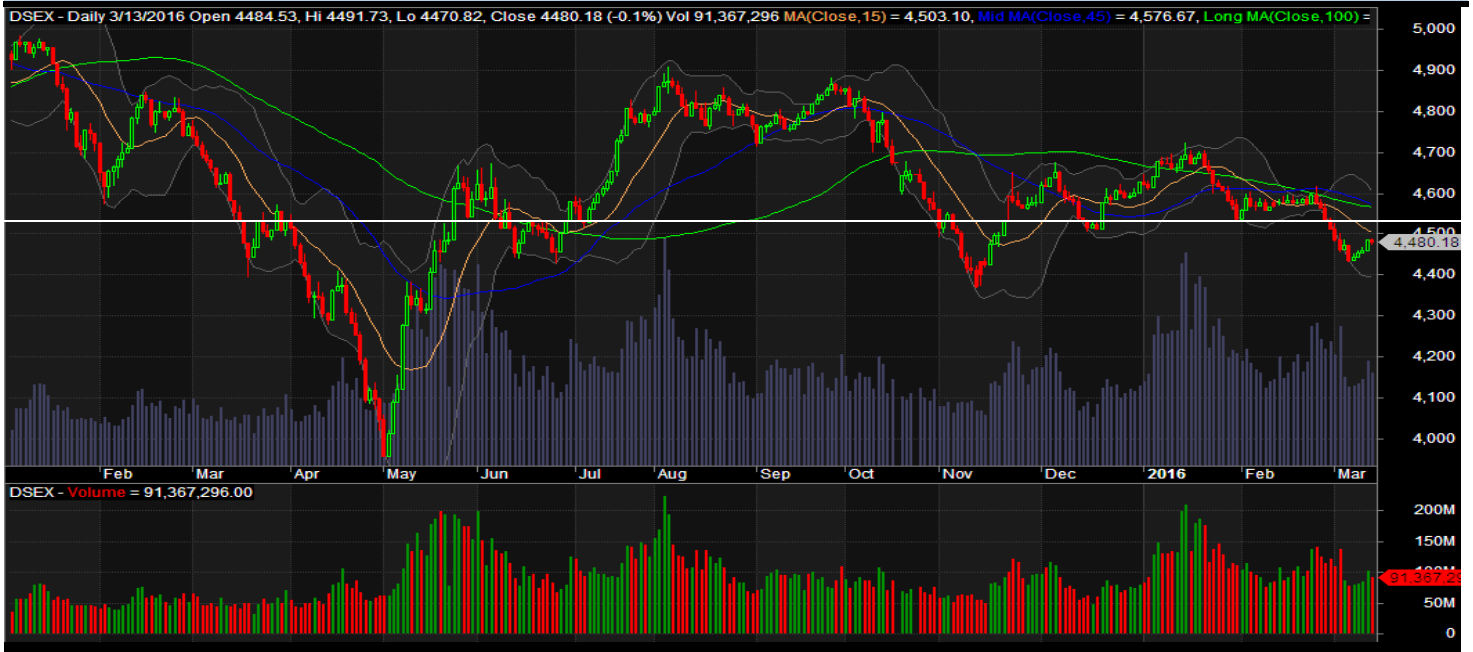
**Important News****Company News:**

PUBALIBANK: Dividend Declaration: The Board of Directors has recommended 12% cash dividend for the year ended on 31.12.2015. Date of AGM: 28.04.2016, Time: 10:30 AM, Venue: Pubali Bank Auditorium, Head Office, 26 Dilkusha C/A, Dhaka-1000. Record Date: 03.04.2016. The Company has also reported Consolidated EPS of Tk. 3.34, Consolidated NAV per share of Tk. 27.48 and Consolidated NOCFPS of Tk. 2.87 for the year ended on 31.12.2015 as against Tk. 3.54, Tk. 25.14 and Tk. 3.28 respectively for the year ended on 31.12.2014.

**Recent Dividend Declaration**

| Ticker  | Dividend      | Record Date |
|---|---------------|-------------|
| IDLC Finance Limited                                      | 25% C         | 13.03.16    |
| Industrial Promotion & Development Co. of Bangladesh Ltd. | 20% B         | 08.03.16    |
| Lanka Bangla Finance Limited                              | 15% C & 15% B | 14.03.16    |
| Dutch Bangla Bank Limited                                 | 40% C         | 15.03.16    |
| Phoenix Finance and Investments Ltd.                      | 20% C         | 31.03.16    |
| Summit Alliance Port Ltd.                                 | 10% B         | 21.03.16    |

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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