

# Today's Market Overview



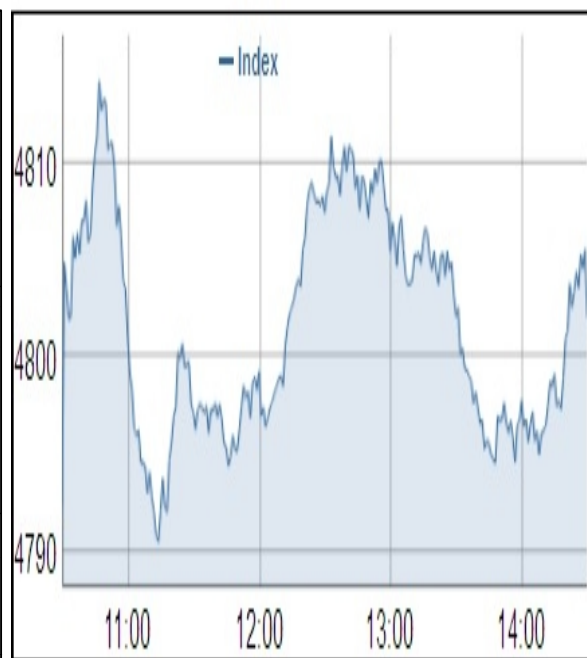
Sunday, August 02, 2015

|                       |          |              |                      |                          |                          |                          |
|-----------------------|----------|--------------|----------------------|--------------------------|--------------------------|--------------------------|
| <b>DSEX</b>           | 4,802.02 | <b>0.20%</b> | <b>Issues Traded</b> | ↑ <b>Advances</b><br>141 | ↓ <b>Declines</b><br>149 | ↔ <b>Unchanged</b><br>29 |
| <b>Total Turnover</b> | 8,065.32 | <b>28.0%</b> |                      |                          |                          |                          |

Stocks continued their gaining streak slightly like the previous day's with a very improved turnover as most of the investors went for choppy trading. After five trading sessions the DSEX broke the 4800 mark while late hour buying spree helped the turnover to cross 8 billion mark. The premier bourse of the nation opened with very positive mood but soon after the first half an hour it started to get down then again after the first hour it started to climb up and continued the same see-saw mood till the closure with a marginal gain. Other two indices DS30 & DSES the shariah based index both performed marginally positive. Most of the major sectors put a mixed performance. Bank, Engineering & Service was the gainer while NBFI, Ceramics & Cement sector was not in green zone.

The general gauge DSEX ended at 4802.02 with an advance of +0.20% which added 9.72 points to the broad DSEX. The Turnover advanced heavily by +28.00% which was only 1767 Million BDT healthier than that of previous day and finally finished the mark at 8065.32 million BDT. A total of 141 issues advanced with 149 declined and 29 remained unchanged. Sectors that improved were: Bank (+0.7%) Engineering (+2.2%) Pharmaceuticals (+0.7%) Service (+2.0%) Power (+0.1%) Paper (+1.9%) Miscellaneous (3.4%) Mutual Fund (+1.1%) & sectors that declined were: NBFI (-1.73%) Telecom (-1.43%) Cement (-0.44%) Ceramics (-1.50%) Insurance (-1.10%) IT (-0.37%).

LAFSURCEML topped in the Volume chart with a turnover of 29.78 BDT crore. ISTICB ranked top gainer chart with a price hike of +19.50% and MEGHNALIFE topped in the loser chart with a decline of -18.77% from its prevailing price. ISLAMIBANK 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 (forward) | 15.61      |                  |              |
|---------------------------|--------------|-----------|------------------|--------------------|----------------------|------------|------------------|--------------|
| DSEX                      | 4802.02      | 9.72      | 0.20%            | DSEX Week H/L      | 4802/4777            | Market Cap | 3,372,024.43     |              |
| DSES                      | 1192.72      | 2.85      | 0.24%            | Group Performances |                      |            |                  |              |
| DS30                      | 1885.90      | 1.99      | 0.11%            | GROUP              | M.Cap BDTcr.         | Δ % M.Cap  | Turnover BDT Cr. | Δ % Turnover |
| <b>Turnover Scenario</b>  |              |           |                  | Group A            | 265,254.99           | 0.02%      | 714.37           | 34.0%        |
| Today's Turnover(TT)(mil) | Change (Mil) | % Change  | Group B          | 1,383.98           | 0.27%                | 17.16      | -10.3%           |              |
| 8065.32                   | 1,767        | 28.0%     | Group N          | 265,254.99         | 0.02%                | 714.37     | 34.0%            |              |
|                           |              |           | Group Z          | 2,473.38           | -0.35%               | 6.05       | -0.4%            |              |

## Top Ten Volume (in BDT. crore)

| Stock      | TT    | YT    | AT    | % Δ in Turnover | TT/AT | CP    | YP    | % Δ P   | Number of shares in Million | Public Holding |
|------------|-------|-------|-------|-----------------|-------|-------|-------|---------|-----------------------------|----------------|
| LAFSURCEML | 29.78 | 41.67 | 27.20 | -28.53%         | 9%    | 125.8 | 127   | -0.94%  | 1,161,373,500.0             | 30%            |
| KPCL       | 28.78 | 8.51  | 16.24 | 238.11%         | 77%   | 76.3  | 77.3  | -1.29%  | 361,284,710                 | 13%            |
| BXPHARMA   | 27.41 | 20.27 | 15.87 | 35.21%          | 73%   | 71.2  | 69.7  | 2.15%   | 386,244,234.60              | 50%            |
| DESCO      | 26.27 | 10.16 | 7.10  | 158.68%         | 270%  | 76.3  | 74.6  | 2.28%   | 378,637,909.10              | 9%             |
| FARCHEM    | 22.33 | 13.77 | 9.82  | 62.17%          | 127%  | 54.1  | 53.2  | 1.69%   | 109,237,878.00              | 12%            |
| SHASHADNIM | 19.83 | 23.93 | 6.30  | -17.13%         | 215%  | 48    | 44.4  | 8.11%   | 112,787,630.00              | 46%            |
| GP         | 19.48 | 15.21 | 18.32 | 28.08%          | 6%    | 325.7 | 330.5 | -1.45%  | 1,350,300,022.00            | 4%             |
| BSRMLTD    | 18.36 | 7.28  | 10.70 | 152.08%         | 72%   | 105.3 | 97.2  | 8.33%   | 173,351,038.00              | 9%             |
| BSRMSTEEL  | 17.97 | 4.97  | 4.77  | 261.28%         | 277%  | 87.8  | 84.7  | 3.66%   | 341,775,000.00              | 13%            |
| OAL        | 17.79 | 16.47 | NM    | 7.97%           | NM    | 33.2  | 66.1  | -49.77% | 116,910,000.00              | 68%            |

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 |
| 1STICB  | 1434   | 1200   | 1167.565 | 19.50% | 22.82%           | MEGHNALIFE   | 60.60  | 74.60  | 70.33 | -18.77% | -13.83%       |
| BDWELDING   | 23.9   | 21.8   | 20.575   | 9.63%  | 16.16%           | ISNLTD   | 10.80  | 12.00  | 10.13 | -10.00% | 6.61%         |
| ISLAMIBANK  | 24     | 21.9   | 18.63    | 9.59%  | 28.82%           | PLFSL  | 15.40  | 16.90  | 15.17 | -8.88%  | 1.52%         |
| NPOLYMAR  | 108.3  | 98.9   | 85.735   | 9.50%  | 26.32%           | PHOENIXFIN   | 18.30  | 19.70  | 19.22 | -7.11%  | -4.76%        |
| GEMINISEA   | 318.8  | 293.7  | 260.635  | 8.55%  | 22.32%           | STANDARINS   | 15.30  | 16.20  | 16.36 | -5.56%  | -6.45%        |
| BSRMLTD   | 105.3  | 97.2   | 79.41    | 8.33%  | 32.60%           | RUPALIBANK   | 45.50  | 48.10  | 43.52 | -5.41%  | 4.56%         |
| SHASHADNIM  | 48     | 44.4   | 39.38    | 8.11%  | 21.89%           | PRAGATILIF   | 103.60 | 109.20 | 88.23 | -5.13%  | 17.43%        |
| ICB1STNRB   | 21.9   | 20.3   | 21.12    | 7.88%  | 3.69%            | NHFIL  | 24.50  | 25.70  | 22.75 | -4.67%  | 7.72%         |
| NAVANACNG   | 61.6   | 57.6   | 56.645   | 6.94%  | 8.75%            | FASFIN   | 12.60  | 13.20  | 12.19 | -4.55%  | 3.36%         |
| STYLECRAFT  | 1096.2 | 1031.8 | 1037.75  | 6.24%  | 5.63%            | PRAGATIINS   | 25.40  | 26.70  | 25.05 | -4.87%  | 1.42%         |

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   | 41.00        | 27.16     | 0.05           | 0.05      | 50.9%           | 38095.92              | 37812.95  | 14.04%        | 13.94%    | 0.7%      |  |
| Cement   | 36.91        | 47.38     | 0.05           | 0.08      | -22.09%         | 20829.99              | 20922.32  | 7.68%         | 7.71%     | -0.44%    |  |
| Ceramics   | 8.73         | 9.04      | 0.01           | 0.02      | -3.48%          | 2954.41               | 2999.44   | 1.09%         | 1.11%     | -1.50%    |  |
| Engineering  | 170.93       | 105.51    | 0.22           | 0.18      | 62.0%           | 15015.43              | 14686.29  | 5.54%         | 5.41%     | 2.2%      |  |
| Food & Allied Product                              | 25.79        | 16.43     | 0.03           | 0.03      | 57.0%           | 24042.73              | 24266.43  | 8.86%         | 8.95%     | -0.92%    |  |
| Insurance  | 8.20         | 6.37      | 0.01           | 0.01      | 28.7%           | 7046.04               | 7124.10   | 2.60%         | 2.63%     | -1.10%    |  |
| IT   | 4.89         | 4.79      | 0.01           | 0.01      | 2.1%            | 554.94                | 556.99    | 0.20%         | 0.21%     | -0.37%    |  |
| Jute   | 0.56         | 0.84      | 0.00           | 0.00      | -32.51%         | 75.82                 | 76.71     | 0.03%         | 0.03%     | -1.16%    |  |
| Miscellaneous                                      | 30.21        | 26.37     | 0.04           | 0.04      | 14.5%           | 8000.34               | 7739.02   | 2.95%         | 2.85%     | 3.4%      |  |
| Mutual Fund  | 11.31        | 9.04      | 0.01           | 0.02      | 25.2%           | 3464.27               | 3426.73   | 1.28%         | 1.26%     | 1.1%      |  |
| NBFI   | 34.66        | 42.33     | 0.05           | 0.07      | -18.11%         | 8047.94               | 8189.37   | 2.97%         | 3.02%     | -1.73%    |  |
| Paper & Printing                                   | 2.66         | 2.09      | 0.00           | 0.00      | 27.2%           | 249.41                | 244.69    | 0.09%         | 0.09%     | 1.9%      |  |
| Pharmaceuticals & Chemicals                        | 132.68       | 102.78    | 0.17           | 0.17      | 29.1%           | 40999.96              | 40714.32  | 15.11%        | 15.01%    | 0.7%      |  |
| Power & Energy                                     | 139.23       | 87.65     | 0.18           | 0.15      | 58.9%           | 40255.88              | 40214.65  | 14.84%        | 14.83%    | 0.1%      |  |
| Service & Real Estate                              | 23.80        | 8.70      | 0.03           | 0.01      | 173.7%          | 2047.18               | 2007.07   | 0.75%         | 0.74%     | 2.0%      |  |
| Tannery  | 3.18         | 2.13      | 0.00           | 0.00      | 49.2%           | 2401.40               | 2425.37   | 0.89%         | 0.89%     | -0.99%    |  |
| Telecommunication                                  | 24.35        | 17.94     | 0.03           | 0.03      | 35.7%           | 46006.11              | 46673.74  | 16.96%        | 17.21%    | -1.43%    |  |
| Textile  | 56.88        | 61.94     | 0.07           | 0.10      | -8.17%          | 8746.92               | 8726.80   | 3.22%         | 3.22%     | 0.2%      |  |
| Travel & Leisure                                   | 12.00        | 11.64     | 0.02           | 0.02      | 3.1%            | 2441.88               | 2442.92   | 0.90%         | 0.90%     | -0.04%    |  |

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       |        |                             |       |
|--------------|---------------|-----------------------|--------|-----------------------------|-------|
| ISLAMIBANK   | GP            | Bank                  | 8.44   | NBFI                        | 32.52 |
| RENATA       | BATBC         | Cement                | 44.73  | Paper & Printing            | 83.23 |
| BERGERPBL    | SQRPHARMA     | Ceramics              | 35.60  | Pharmaceuticals & Chemicals | 30.29 |
| BSRMLTD      | UPGDCL        | Engineering           | 36.47  | Power & Energy              | 16.85 |
| TITASGAS     | LAFSURCEML    | Food & Allied Product | 35.23  | Service & Real Estate       | 44.09 |
| BSRMSTEEL    | RUPALIBANK    | Insurance             | 14.09  | Tannery                     | 33.64 |
| POWERGRID    | MJLBD         | IT                    | 17.78  | Telecommunication           | 29.30 |
| MARICO       | OLYMPIC       | Jute                  | 123.37 | Textile                     | 17.05 |
| DESCO        | SPCL          | Miscellaneous         | 36.56  | Travel & Leisure            | 15.82 |
| BXPBARMA     | PLFSL         |                       |        |                             |       |

**Important News**

**Recent Dividend Declaration**

**Company News:**

**1STICB: Dividend Declaration:** The Board of Directors has approved 1,000% cash dividend for the year 2014-2015. Record date: 12.08.2015. Net income of Tk. 107.05 million with earning per unit of Tk. 142.73 for the period ended on June 30, 2015 as against Tk. 76.64 million and Tk. 102.19 respectively for same period of the previous year. NAV of Tk. 268.33 at cost price and Tk. 1,521.50 at market price basis as on 30.06.2015 and Tk. 205.58 and Tk. 1,550.10 respectively as on 30.06.2014.

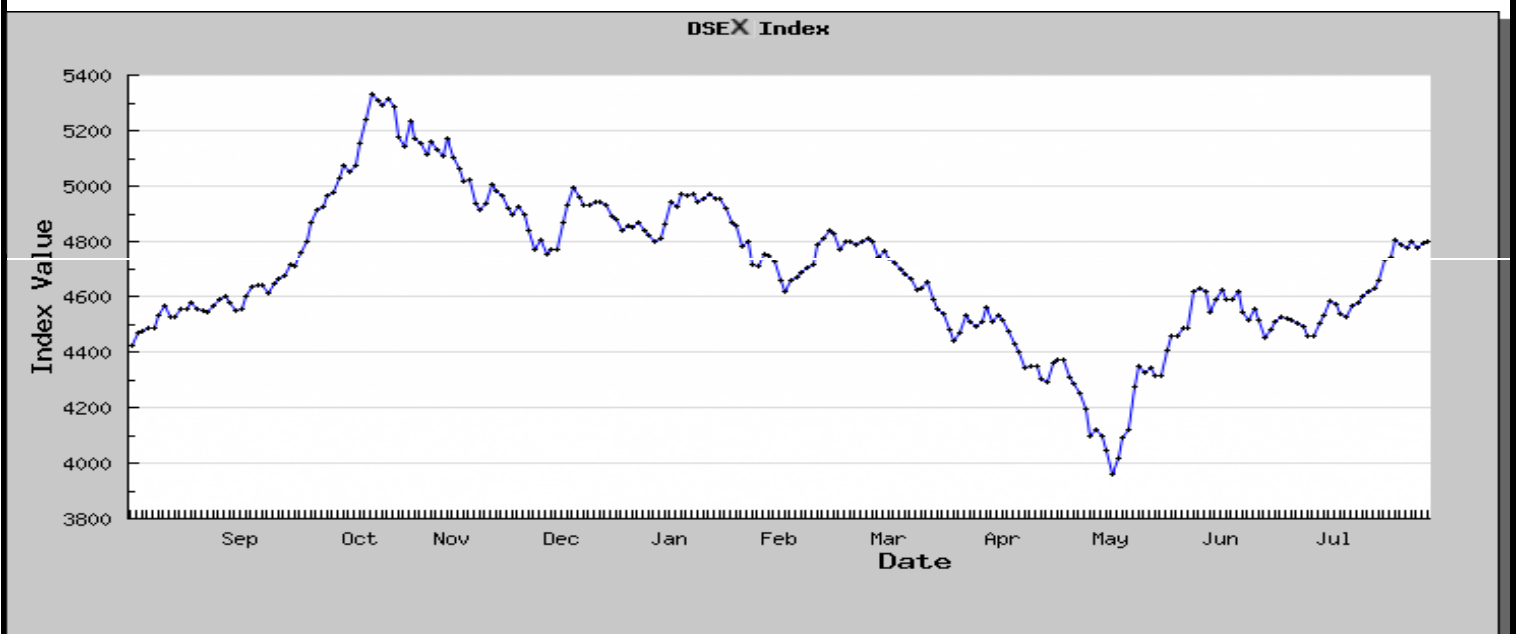
**MTB Q2 Financial: (Q2 Un-audited):** Consolidated EPS for April-June, 2015 was Tk. 0.68 as against Tk. 0.50 for April-June, 2014, consolidated EPS for Jan-June, 2015 was Tk. 1.35 as against Tk. 1.00 for Jan-June, 2014. Consolidated NOCFPS was Tk. 5.02 for Jan-June, 2015 as against Tk. 3.35 for Jan-June, 2014. Consolidated NAV per share was Tk. 19.83 as of June 30, 2015 and Tk. 22.00 as of December 31, 2014.

**CITYBANK: Q2 Financials: (Q2 Un-audited):** Consolidated EPS for April-June, 2015 was Tk. 1.08 as against Tk. 0.64 for April-June, 2014, consolidated EPS for Jan-June, 2015 was Tk. 1.71 as against Tk. 0.89 for Jan-June, 2014. Consolidated NOCFPS was Tk. (0.71) for Jan-June, 2015 as against Tk. (0.68) for Jan-June, 2014. Consolidated NAV per share was Tk. 27.12 as of June 30, 2015 and Tk. 26.75 as of December 31, 2014. Date: 02.08.2015

| Ticker                           | Dividend       | Record Date |
|----------------------------------|----------------|-------------|
| Sandhani Life Insurance Co. Ltd. | 22%B           | 12.08.15    |
| National Bank Limited            | 10%B           | 30.08.15    |
| Square Pharmaceuticals Limited   | 30%C & 12.50%B | 13.08.15    |
|                                  |                |             |
|                                  |                |             |

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

**DSEX Graph for last one year**



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