Daily Capital Market Synopsis

Tuesday, July 12, 2022

Chart: DSE Broad Index, Source: DSE Website

Index Update

Symbol	Today	Point Change	% Change
DSEX	6355.49	-11.47	-0.2%
DSES	1385.63	-2.26	-0.2%
DS30	2284.14	-9.63	-0.4%

Market Performance

Particulars	Today	Prev. Day	% Change
Turnover (BDT mn)	6795	7887	-13.8%
Trade Volume	189078515	196012698	-3.5%
Total No. of Trade	136334	144768	-5.8%

Source: NRBCBSL Research & DSE Website

Market fell on the first day after Eid Vacation

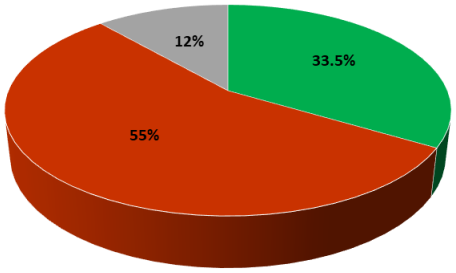
DSEX ended 11.47 points negative and closed at 6355.49 points today. Market started positive but fell down from 2nd hour to the last hour and slightly improved in the end. Market participation fell also as market is still in vacation tinge. All the sectors were negative except Financial Institutions, Textile, Travel & Leisure sectors. Market may have started a down trend reflecting the recession signals all over the world. The world macro-economic news flow along with the domestic struggles are becoming relentlessly gloomy day by day. Talks of gas rationing in Europe, crisis in Sri Lanka, a fresh flare up of COVID-19 cases, rising inflation and cost of fund are some of many impediments to count. We may have to get prepared for another depressed half of this year. Market may remain sluggish tomorrow as well. Textile sector may perform better. On the Macro news front, Garment exports to Bangladesh's single largest destination, the USA, rose by 51.57 per cent year-on-year to $9.01 billion in the just concluded fiscal year.

Market activity decreased significantly today than the previous day generating a trade volume of 189078515 from a total trade of 136334, raising BDT 6795mn turnover which is around 14% lower than the last day.

BEACONPHAR, IPDC, PUBALIBANK, ISLAMIBANK, MLDYEING mainly moved the index positively. On the other hand, BEXIMCO, BXPHARMA, ROBI, LHBL, BATBC were the negative forces today.

GOLDENSON, NURANI, ZAHINTEX, SAIHAMTEX, SAFKOSPINN were among the top gainers and JANATAINS, PRAGATILIF, NITOLINS, SONALIPAPR, KAY&QUE were among the top companies to lose price today.

Quazi Naureen Ahmed



Source: NRBCBSL Research

Market Value

Particulars	Today	Prev. Day	Change
M. Cap	5179177.71	5187724.77	-0.2%
Mkt P/E	15.19	15.25	-0.4%
Market Cap. To GDP	17.2%	17.2%	-0.2%

Source: NRBCBSL Research & DSE Website

Top 10 Gainers

Code	LTP	YCP	Change	Volume
GOLDENSON	19.10	17.40	9.8%	5399456
NURANI	8.00	7.30	9.7%	3252705
ZAHINTEX	9.80	9.10	9.1%	1848555
SAIHAMTEX	25.40	23.60	4.5%	4553128
SAFKOSPINN	27.20	25.50	4.5%	2103030
ISNLTD	59.90	56.30	4.4%	605883
REGENTTEX	10.20	9.60	4.2%	1044421
ECABLES	190.00	178.90	4.1%	265959
ETL	10.30	9.70	3.7%	1116628
RNSPIN	6.90	6.50	3.7%	1326011

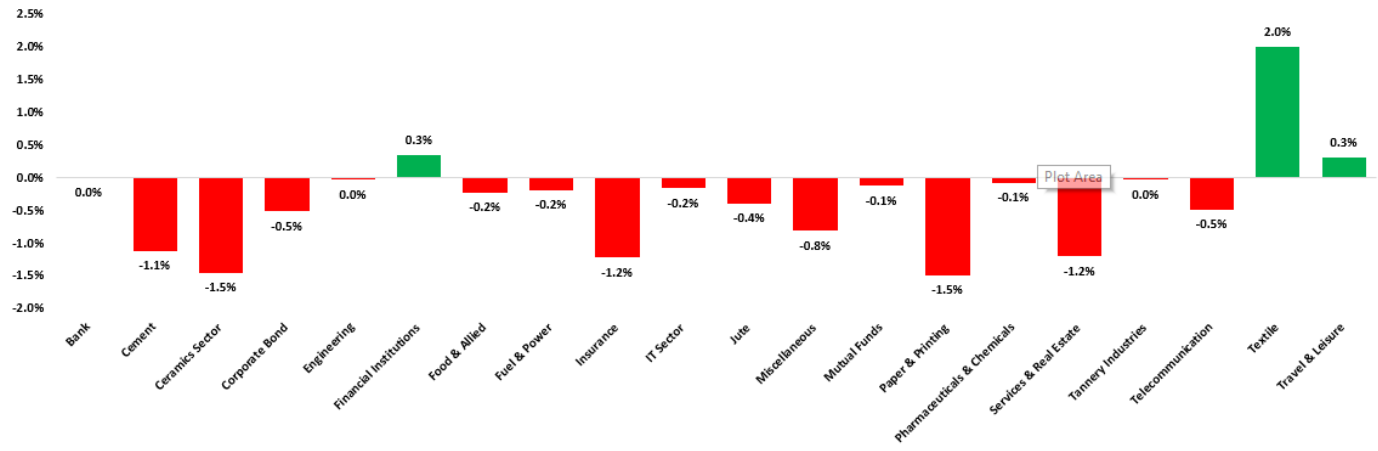
Source: NRBCBSL Research & DSE Website

Top 10 Losers

Code	LTP	YCP	Change	Volume
JANATAINS	32.60	34.90	-4.1%	175296
PRAGATILIF	75.40	79.90	-3.7%	26153
NITOLINS	44.10	45.00	-2.0%	33509
SONALIPAPR	655.00	668.30	-2.0%	83090
KAY&QUE	251.70	256.80	-2.0%	10560
DULAMIACOT	74.50	76.00	-2.0%	10604
STANCERAM	144.10	147.00	-2.0%	8609
MONOSPOOL	159.20	162.40	-2.0%	40150
RELIANCINS	59.80	61.00	-2.0%	22879
ORIONINFU	94.70	96.60	-2.0%	326251

Source: NRBCBSL Research & DSE Website

Sectoral Gain



Source: NRBCBSL Research

Companies with Highest & Lowest P/E

Highest

Company	P/E
LEGACYFOOT	833.8
BANGAS	663.0
AMBEEPHA	512.3
EASTRNLUB	502.7
APEXTANRY	384.4
ARGONDENIM	369.4
EMERALDOIL	361.7
BEACHHATCH	346.5
AL-HAJTEX	327.5
KAY&QUE	273.6

Source: NRBCBSL Research

Lowest

Company	P/E
SOUTHEASTB	2.7
JAMUNABANK	3.3
EBLNRBMF	3.7
MERCANBANK	4.1
DHAKABANK	4.6
FIRSTSBANK	4.6
TRUSTB1MF	4.8
BANKASIA	4.9
SHAHJABANK	5.0
PREMIERBAN	5.1

Source: NRBCBSL Research

Top 10 Blue Chip Companies

Company	LTP	YCP	Change%	Value (BDT mn)
TITASGAS	44.40	43.80	1.4	131.06
FORTUNE	89.60	88.70	1.0	355.59
ISLAMIBANK	32.50	32.20	0.9	0.85
BEACONPHAR	256.50	254.20	0.9	5.77
GP	289.10	288.30	0.3	39.89
IDLC	48.10	48.00	0.2	5.40
SQURPHARMA	215.40	215.10	0.1	25.93
UPGDCL	249.30	249.20	0.0	6.63
CITYBANK	22.60	22.60	0.0	1.96
EBL	32.80	32.80	0.0	2.54

Source: NRBCBSL Research

Top 10 Turnover Leaders

Company	LTP	YCP	Change%	Value (BDT mn)
IPDC	63.20	60.50	4.5	631.40
BEXIMCO	130.10	131.80	-1.3	513.53
FORTUNE	89.60	88.70	1.0	355.59
INTRACO	31.00	31.30	-1.0	191.08
TITASGAS	44.40	43.80	1.4	131.06
FUWANGFOOD	26.30	26.50	-0.8	123.96
SAIHAMTEX	25.40	23.60	7.6	113.56
GOLDENSON	19.10	17.40	9.8	99.52
QUEENSOUTH	26.40	25.20	4.8	97.51
JHRML	79.90	81.40	-1.8	91.37

Source: NRBCBSL Research

Block Trades

Instrument	Max Price	Min Price	Trade	Trades Quantity	Value (BDT mn)
ACMEPL	37.00	37.00	1.00	14500.00	0.54
AL-HAJTEX	130.00	129.30	3.00	27850.00	3.61
AMCL(PRAN)	271.00	270.00	2.00	46707.00	12.64
APEXTANRY	160.90	160.90	1.00	4500.00	0.72
BDAUTOCA	148.00	148.00	1.00	13000.00	1.92
BDCOM	35.70	35.70	1.00	37000.00	1.32
BDFINANCE	51.30	51.30	1.00	20000.00	1.03
BPML	54.80	54.80	1.00	9706.00	0.53
DSHGARME	169.60	167.60	2.00	7010.00	1.18
EHL	63.80	63.80	1.00	11400.00	0.73
FORTUNE	97.50	97.50	1.00	200000.00	19.50
GP	302.50	293.80	2.00	18500.00	5.57
GSPFINANCE	34.60	31.30	5.00	149000.00	4.77
ICBAGRANI1	9.90	9.80	2.00	115000.00	1.13
INTRACO	32.50	32.50	1.00	40000.00	1.30
IPDC	63.00	61.60	7.00	3765000.00	234.87
JAMUNAOIL	170.80	170.80	1.00	40000.00	6.83
JHRML	87.00	87.00	1.00	45001.00	3.92
METROSPIN	28.00	28.00	1.00	19005.00	0.53
MPETROLEUM	199.30	199.30	1.00	17000.00	3.39
NPOLYMER	56.00	56.00	1.00	10000.00	0.56
PROVATIINS	67.00	67.00	1.00	38000.00	2.55
QUEENSOUTH	26.00	26.00	1.00	35000.00	0.91
ROBI	37.00	37.00	1.00	15000.00	0.56
SALVOCHEM	70.40	65.10	2.00	20405.00	1.39
SEAPEARL	45.00	45.00	1.00	20000.00	0.90
SIMTEX	18.20	18.10	3.00	120000.00	2.18
SONALIPAPR	665.00	665.00	1.00	4400.00	2.93
SPCERAMICS	52.00	52.00	3.00	33000.00	1.72
SQURPHARMA	210.80	210.80	1.00	20000.00	4.22
SUNLIFEINS	48.50	47.50	2.00	37000.00	1.78
VFSTDL	24.00	24.00	2.00	113928.00	2.73
Total=32			55	5066912	328.432

Source: NRBCBSL Research

Major News

Textile & RMG

Apparel exports to US log record 51pc rise

Garment exports to Bangladesh's single largest destination, the USA, rose by 51.57 per cent year-on-year to $9.01 billion in the just concluded fiscal year. Germany remained the second largest export destination, as Bangladesh shipped garment items worth $7.16 billion to the central European nation, registering a 27.74 per cent year-on-year growth, according to data from the Export Promotion Bureau (EPB). Garment shipment to the European Union (EU), the largest apparel importer in the world, rose by 33.87 per cent year-on-year to $21.04 billion in the last fiscal year.

News link: https://www.thedailystar.net/business/economy/news/apparel-exports-us-log-record-51pc-rise-3066741

International Business

Euro drops to 20-year low

The euro slid to a 20-year low and came closer to parity against the dollar on Monday on concerns that an energy crisis will tip the region into a recession, while the US currency was boosted by expectations that the Federal Reserve will hike rates faster and further than peers, reports Reuters. The biggest single pipeline carrying Russian gas to Germany, the Nord Stream 1 pipeline, began annual maintenance on Monday, with flows expected to stop for 10 days, but governments, markets and companies are worried the shutdown might be extended because of the war in Ukraine.

News link: https://thefinancialexpress.com.bd/trade/euro-drops-to-20-year-low-1657593387

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Prepared by

NRBC Bank Securities Ltd. Research

Quazi Naureen Ahmed,
Analyst, NRBC Bank Securities Ltd.
naureen@narbcbanksecurities.com

Contact Us

Head Office
Hadi Mansion (7th Floor),
2, Dilkusha C/A,
Dhaka-1000
Tel: +880257165253-54

Gulshan Branch Office
Silver Tower (4th Floor, South Side),
52, Gulshan Avenue, Gulshan 1 (Circle),
Dhaka-1212
Tel: +88028834969

Modhumita Extension Office
Modhumita Building (Ground Floor),
158-160, Motijheel C/A,
Dhaka-1000
Tel: 880257160701

Monir Tower Extension Office
Monir Tower (6th Floor)
167/1 DIT Extension Road
Dhaka-1000