Daily Capital Market Synopsis

Tuesday, September 20, 2022

Source: DSE Broad Index, Source: DSE Website

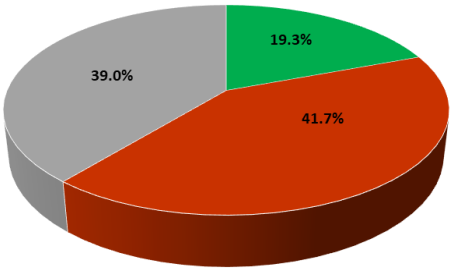
Index Update

Symbol	Today	Point Change	% Change
DSEX	6596.66	-4.22	-0.1%
DSES	1448.38	-3.01	-0.2%
DS30	2401.76	-4.34	-0.2%

Market Performance

Particulars	Today	Prev. Day	% Change
Turnover (BDT mn)	28323.07	19898.30	42.3%
Trade Volume	430016279	302662835	42.1%
Total No. of Trade	328145	272885	20.3%

Source: NRBCBSL Research & DSE Website



Source: NRBCBSL Research

Top 10 Gainers

Code	TCP	YCP	Change	Volume
CENTRALPHL	13.9	12.7	9.4%	2,731,289
SPCL	95.2	87.2	9.2%	6,108,042
UNIONCAP	11.2	10.3	8.7%	2,616,783
BDCOM	47.3	43.8	8.0%	8,694,010
SEAPEARL	103.9	96.3	7.9%	1,361,625
IBP	22.3	20.8	7.2%	7,255,570
BPML	77.9	72.8	7.0%	5,207,644
ORIONINFU	583.1	546.3	6.7%	505,114
JHRML	127.8	120.6	6.0%	5,618,389
AAMRATECH	39.4	37.3	5.6%	5,827,889

Source: NRBCBSL Research & DSE Website

Market ended facing huge sell pressure amid record volume

DSEX edged down 4.22 points and closed at 9596.66 points today. Market started positive and surged till the last hour but fell drastically down to slightly negative in the end. Market participation today had a robust jump reaching around 13 months high. All the sectors were negative except Paper & Printing, Cement, Jute, Financial Institution, Miscellaneous and Pharmaceutical & Chemicals. Market became negative after 3 successive positive sessions as a result of investors' short term profit booking tendency. Such tendencies are responsible for uncertain and volatile market. However, fund managers and retail investors realize short term profit as they lack confidence on the long-term market trends because of recent uncertainties. Market may face some fluctuations with lower volume tomorrow. In term of technical analysis, DSEX came down after slightly breaking the resistance at around 6665 points but came back from slightly breaching the support at around 6590 points and closed near it as well. Index may become volatile again tomorrow with somewhat little change in points at the end. On Capital market news front, Foreign investors in Bangladesh's stock market are selling shares en masse as the local currency's depreciation against the US dollar coupled with various policy changes over the past few years has lowered their confidence in securing adequate returns.

Market activity increased today than the previous day generating a trade volume of 430016279 from a total trade of 328145 raising BDT 28323.07mn turnover which is around 42% higher than the last day.

LHBL, ORIONPHARM,ACMELAB,SPCL, DELTALIFE mainly moved the index positively. On the other hand, BEACONPHAR, UNIQUEHRL, GENEXIL, TITASGAS, EGEN were the negative forces today.

CENTRALPHL, SPCL, UNIONCAP, BDCOM, SEAPEARL were among the top gainers and BDWELDING, BIFC, STANCERAM, EGEN, ECABLE were among the top companies to lose price today.

Quazi Naureen Ahmed

Market Value

Particulars	Today	Prev. Day	Change
M. Cap	5231878.36	5232369.04	0.0%
Mkt P/E	15.58	15.60	-0.1%
Market Cap. To GDP	17.4%	17.4%	0.0%

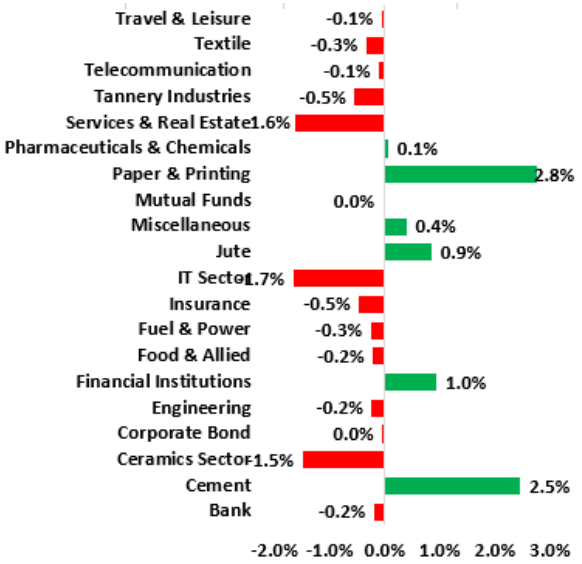
Source: NRBCBSL Research & DSE Website

Top 10 Losers

Code	TCP	YCP	Change	Volume
BDWELDING	30.5	33.6	-9.2%	1,261,700
BIFC	11.4	12.5	-8.8%	859,934
STANCERAM	152.3	166.1	-8.3%	83,908
EGEN	53.1	57.8	-8.1%	1,022,426
ECABLES	203	218.6	-7.1%	472,722
NTLTUBES	84.1	89.5	-6.0%	463,604
MIRACLEIND	35.2	37.4	-5.9%	1,607,076
GENEXIL	78.5	83	-5.4%	4,348,886
RSRMSTEEL	21.30	22.50	-5.3%	1,100,424
PAPERPROC	216	228.1	-5.3%	289,702

Source: NRBCBSL Research & DSE Website

Sectoral Gain



Source: NRBCBSL Research

Top Picks

Company	LTP	YCP	Gain	Volume
JHRML	127.80	120.60	6.0%	5618389
BDCOM	47.30	43.80	8.0%	8694010
BSC	160.80	154.20	4.3%	9421617
LHBL	79.80	77.10	3.5%	9815662
EHL	88.90	92.90	-4.3%	7038453
ORIONPHARM	144.70	140.40	3.1%	21990073
ACMELAB	102.80	97.60	5.3%	8709848
COPPERTECH	47.90	46.00	4.1%	6776489
BXPHARMA	185.70	184.90	0.4%	2640162
BEACONPHAR	361.00	379.20	-4.8%	538927

Source: NRBCBSL Research

Companies with Highest & Lowest P/E

Highest

Company	P/E
LEGACYFOOT	752.5
BANGAS	653.5
AMBEEPHA	566.86
EASTRNLUB	509.63
ARGONDENIM	341.25
AL-HAJTEX	330.25
BEACHHATCH	312.75
ORIONINFU	305.82
EMERALDOIL	303.33
ROBI	300

Source: NRBCBSL Research

Lowest

Company	P/E
SOUTHEASTB	2.7
MERCANBANK	3.13
JAMUNABANK	3.5
SHAHJABANK	4.14
PREMIERBAN	4.25
EXIMBANK	4.56
BANKASIA	5.05
NCCBANK	5.19
UTTARABANK	5.26
DHAKABANK	5.27

Source: NRBCBSL Research

Top 10 Blue Chip Companies

Company	LTP	YCP	Change%	Value (BDT mn)
DELTALIFE	163.00	156.8	3.95	540.528
LHBL	79.80	77.1	3.5	774.279
ORIONPHARM	144.70	140.4	3.06	3,272.52
LANKABAFIN	26.70	26.2	1.91	120.5
PUBALIBANK	28.40	28.2	0.71	15.111
BSRMLTD	94.40	93.8	0.64	28.103
OLYMPIC	134.80	134	0.6	92.891
BXPHARMA	185.70	184.9	0.43	502.972
IDLC	49.90	49.7	0.4	26.85
ISLAMIBANK	32.80	32.7	0.31	3.981

Source: NRBCBSL Research

Top 10 Turnover Leaders

Company	LTP	YCP	Change%	Value (BDT mn)
BEXIMCO	140	140.3	-0.2%	3,420.59
ORIONPHARM	144.70	140.4	3.1%	3,272.52
BSC	160.80	154.2	4.3%	1,554.55
ACMELAB	102.80	97.6	5.3%	907.183
LHBL	79.80	77.1	3.5%	774.279
JHRML	127.80	120.6	6.0%	733.345
EHL	88.90	92.9	-4.3%	669.682
SPCL	95.20	87.2	9.2%	580.674
SPCERAMICS	52.00	53.6	-3.0%	570.755
DELTALIFE	163.00	156.8	4.0%	540.528

Source: NRBCBSL Research

Block Trades

Instrument	Max Price	Min Price	Trade	Trades Quantity	Value (BDT mn)
AL-HAJTEX	143.00	135.00	2.00	50231.00	6.90
AMCL(PRAN)	330.00	330.00	1.00	1904.00	0.63
BATBC	518.80	518.80	1.00	7400.00	3.84
BBS	25.60	25.60	1.00	23800.00	0.61
BDCOM	48.10	40.00	19.00	3963203.00	185.27
BEXIMCO	149.90	145.00	3.00	2026000.00	293.90
BPML	74.40	74.40	2.00	50000.00	3.72
BSC	167.00	150.60	4.00	40101.00	6.23
CAPMBDBLMF	10.10	10.10	1.00	50873.00	0.51
CONFIDCEM	94.00	94.00	1.00	15000.00	1.41
DGIC	44.50	44.50	1.00	200000.00	8.90
EHL	95.00	95.00	1.00	10000.00	0.95
EMERALDOIL	36.80	36.80	1.00	40800.00	1.50
FEKDIL	22.00	22.00	1.00	44000.00	0.97
FORTUNE	81.00	80.00	2.00	24300.00	1.96
FUWANGFOOD	25.00	25.00	1.00	21000.00	0.53
GSPFINANCE	32.00	32.00	1.00	109772.00	3.51
HAKKANIPUL	80.00	80.00	1.00	6400.00	0.51
HRTEX	127.50	127.50	6.00	557500.00	71.08
IBP	22.80	22.80	1.00	50000.00	1.14
ICBAGRANI1	9.90	9.90	1.00	58200.00	0.58
INTRACO	41.00	38.50	2.00	55200.00	2.21
IPDC	63.00	63.00	3.00	134900.00	8.50
JHRML	115.00	115.00	1.00	5500.00	0.63
KDSALTD	83.50	83.50	1.00	27000.00	2.26
KOHINOOR	680.00	680.00	1.00	1438.00	0.98
LHBL	84.50	84.50	1.00	6000.00	0.51
MALEKSPIN	42.00	40.00	4.00	355000.00	14.48
MARICO	2450.00	2450.00	20.00	49200.00	120.54
METROSPIN	48.00	45.00	5.00	144000.00	6.60
MLDYEING	27.10	24.80	4.00	521014.00	12.97
NAHEEACP	79.60	73.00	7.00	264999.00	20.21
NBL	9.10	9.10	2.00	4100000.00	37.31
NCCBANK	13.80	13.80	1.00	154083.00	2.13
NCCBLMF1	7.10	7.10	1.00	239347.00	1.70
NEWLINE	45.10	45.10	1.00	42000.00	1.89
NORTHRNINS	45.80	45.80	1.00	11500.00	0.53
ORIONINFU	570.00	540.00	3.00	6401.00	3.58
ORIONPHARM	154.40	127.10	36.00	2197220.00	330.25
PRIME1ICBA	8.40	8.40	1.00	68520.00	0.58

Source: NRBCBSL Research

Block Trades

Instrument	Max Price	Min Price	Trade	Trades Quantity	Value (BDT mn)
PRIMEINSUR	82.80	82.80	1.00	6049.00	0.50
PRIMETEX	42.00	41.20	2.00	46000.00	1.92
QUASEMIND	67.00	67.00	1.00	10000.00	0.67
RDFOOD	41.00	41.00	6.00	500000.00	20.50
SAIHAMTEX	26.00	26.00	1.00	35000.00	0.91
SALVOCHEM	61.80	61.80	1.00	29990.00	1.85
SAPORTL	33.10	33.10	1.00	209642.00	6.94
SEAPEARL	100.00	88.00	19.00	381151.00	35.74
SHEPHERD	26.00	26.00	1.00	25000.00	0.65
SPCERAMICS	56.70	56.70	1.00	52100.00	2.95
SPCL	95.90	79.00	3.00	26316.00	2.28
SQURPHARMA	215.30	215.30	1.00	4500.00	0.97
SUNLIFEINS	65.00	64.90	2.00	66000.00	4.29
Total=53			187	1712554	1242.652

Source: NRBCBSL Research

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Prepared by

NRBC Bank Securities Ltd. Research Team

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

Sayem Ahmed Lasker
Research Associate
NRBC Bank Securities Ltd.
sayem@nrbcbanksecurities.com

Contact Us

Head Office
Hadi Mansion (3rd 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