Daily Capital Market Synopsis

Monday, September 26, 2022

Source: DSE Broad Index, Source: DSE Website

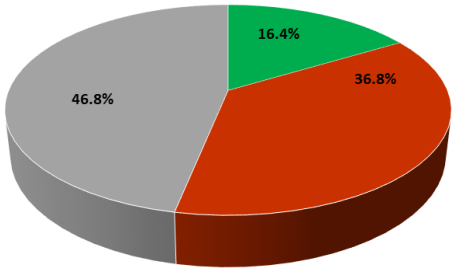
Index Update

Symbol	Today	Point Change	% Change
DSEX	6510.98	-4.19	-0.06%
DSES	1420.67	-0.34	-0.02%
DS30	2331.89	1.97	0.08%

Market Performance

Particulars	Today	Prev. Day	% Change
Turnover (BDT mn)	13001.76	18105.25	-28.2%
Trade Volume	217533570	314057326	-30.7%
Total No. of Trade	207027	262337	-21.1%

Source: NRBCBSL Research & DSE Website



Source: NRBCBSL Research

Top 10 Gainers

Code	TCP	YCP	Change	Volume
BDCOM	64.7	59	9.7%	3,162,888
JHRML	132.3	120.7	9.6%	4,451,254
FINEFOODS	61.3	56.9	7.7%	1,125,326
YPL	25.2	23.5	7.2%	4,452,263
SPCL	98.1	93.1	5.4%	2,896,528
BSC	166.2	158	5.2%	4,205,145
ADNTEL	74.5	71	4.9%	1,537,371
ASIAPACINS	48.2	46	4.8%	44,651
SAIFPOWER	34.1	32.7	4.3%	5,582,283
SPCERAMICS	52	50.4	3.2%	4,963,749

Source: NRBCBSL Research & DSE Website

Index continues turbulent ride with significantly de-creased volume

Market edged down 4.19 points and closed at 6510.98 points. Market started positive and went on a roller-coaster ride throughout the session but ended negative. Market participation went down significantly from yesterday's level reflecting investors hesitancy to be involve such fluctuating market. All the sectors were negative except Miscellaneous, IT, Service & Real Estate, Pharmaceuticals, Bank, Telecommunication. In term of technical analysis, index has failed again to surpass the resistance at around 6595 points for almost two weeks. DSE Broad Index closed near a support at around 6515 points and the next significant support is at 5490 points. On the capital market news fronts, most shares on the Dhaka and Chittagong stock exchanges fell today amid fear among investors that their foreign counterparts would keep pulling out their funds after major economies raised key interest rates.

Market activity decreased today than the previous day generating a trade volume of 217533570 from a total trade of 207027 raising BDT 18105.25mn turnover which is around 28% lower than the last day.

BEXIMCO, BSC, BEACONPHAR, SPCL, ORIONPHARM mainly moved the index positively. On the other hand, SEAPEARL, UNIQUEHRL, LHBL, FAREASTLIF, BBSCABLES were the negative forces today.

BDCOM, JHRML, FINEFOODS, YPL, SPCL were among the top gainers and MEGHNALIFE, AZIZPIPES, JUTESPINN, NORTHERN, PENINSULA were among the top companies to lose price today.

Quazi Naureen Ahmed

Market Value

Particulars	Today	Prev. Day	Change
M. Cap	5200176.17	5206518.499	-0.1%
Mkt P/E	15.45	15.47	-0.1%
Market Cap. To GDP	17.3%	17.3%	-0.1%

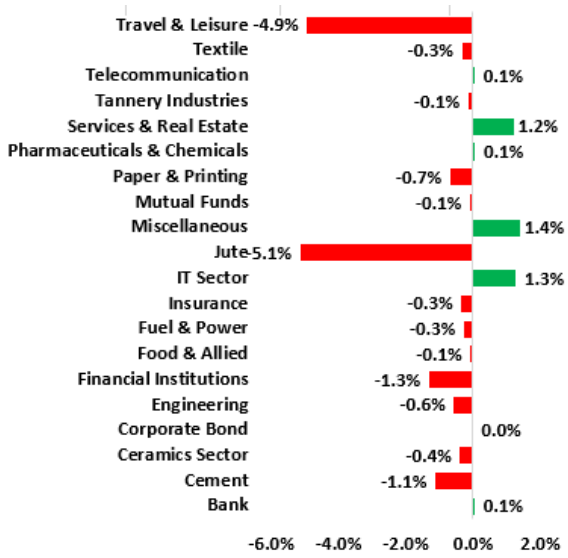
Source: NRBCBSL Research & DSE Website

Top 10 Losers

Code	TCP	YCP	Change	Volume
MEGHNALIFE	64.4	71.8	-10.3%	257,108
AZIZPIPES	128.3	140.3	-8.6%	387,718
JUTESPINN	220.3	237.3	-7.2%	8,766
NORTHERN	246.1	263.1	-6.5%	25,186
PENINSULA	39.2	41.9	-6.4%	5,228,058
SEAPEARL	129	137.6	-6.3%	1,672,275
PAPERPROC	238.2	253.2	-5.9%	626,758
MHSML	26.9	28.5	-5.6%	790,343
AOL	42.2	44.7	-5.6%	1,382,976
INDEXAGRO	128.9	136.4	-5.5%	812,071

Source: NRBCBSL Research & DSE Website

Sectoral Gain



Source: NRBCBSL Research

Top Picks

Company	LTP	YCP	Gain	Volume
BDCOM	64.70	59.00	9.7%	3162888
UNIQUEHRL	76.30	79.20	-3.7%	4445094
BBS	27.10	28.20	-3.9%	6289331
SPCL	98.10	93.10	5.4%	2896528
EHL	94.90	94.50	0.4%	3934138
ALIF	13.40	13.60	-1.5%	2054291
ACMELAB	98.00	98.30	-0.3%	1595664
COPPERTECH	48.00	47.10	1.9%	5284851
LHBL	75.70	76.80	-1.4%	2412328
JHRML	132.30	120.70	9.6%	4451254

Source: NRBCBSL Research

Companies with Highest & Lowest P/E

Highest

Company	P/E
LEGACYFOOT	747.5
BANGAS	642.5
AMBEEPHA	525.3
EASTRNLUB	503.67
ARGONDENIM	341.25
AL-HAJTEX	340.75
BEACHHATCH	312.75
EMERALDOIL	303.33
ROBI	300
ORIONINFU	299.11

Source: NRBCBSL Research

Lowest

Company	P/E
SOUTHEASTB	2.7
MERCANBANK	3.11
JAMUNABANK	3.5
SHAHJABANK	4.18
PREMIERBAN	4.22
EXIMBANK	4.65
BANKASIA	5.05
NCCBANK	5.19
UTTARABANK	5.24
DHAKABANK	5.27

Source: NRBCBSL Research

Top 10 Blue Chip Companies

Company	LTP	YCP	Change%	Value (BDT mn)
ORIONPHARM	137.30	135.1	1.63	1,151.20
BSCCL	230.30	228.1	0.96	77.305
BEXIMCO	132.90	131.7	0.91	1,146.89
BEACONPHAR	317.10	314.7	0.76	98.122
DELTALIFE	151.10	150.2	0.6	91.757
BXPHARMA	172.30	171.3	0.58	66.512
OLYMPIC	129.30	129	0.23	39.9
MPETROLEUM	199.50	199.1	0.2	3.923
BATBC	518.70	518.7	0	17.124
BRACBANK	38.50	38.5	0	0.987

Source: NRBCBSL Research

Top 10 Turnover Leaders

Company	LTP	YCP	Change%	Value (BDT mn)
ORIONPHARM	137.3	135.1	1.6%	1,151.20
BEXIMCO	132.9	131.7	0.9%	1,146.89
BSC	166.2	158	5.2%	686.383
JHRML	132.3	120.7	9.6%	570.672
EHL	94.9	94.5	0.4%	368.027
UNIQUEHRL	76.3	79.2	-3.7%	342.216
SPCL	98.1	93.1	5.4%	278.256
COPPERTECH	48	47.1	1.9%	258.135
SPCERAMICS	52	50.4	3.2%	257.044
SEAPEARL	129	137.6	-6.3%	222.242

Source: NRBCBSL Research

Block Trades

Instrument	Max Price	Min Price	Trade	Trades Quantity	Value (BDT mn)
AAMRATECH	44.70	44.70	1.00	12000.00	0.54
ACMELAB	100.00	100.00	1.00	10000.00	1.00
ADNTEL	71.00	71.00	1.00	10000.00	0.71
ADVENT	31.00	31.00	1.00	100000.00	3.10
AL-HAJTEX	134.00	133.00	10.00	129700.00	17.28
BDCOM	60.00	55.00	7.00	493900.00	29.25
BDFINANCE	44.10	44.10	1.00	100000.00	4.41
BEACONPHAR	341.60	290.00	3.00	56500.00	19.19
BENGALWTL	24.20	24.20	1.00	20900.00	0.51
BERGERPBL	1760.00	1760.00	4.00	64578.00	113.66
BPML	90.00	89.90	2.00	30000.00	2.70
BSC	172.10	150.80	3.00	74400.00	11.89
BSRMSTEEL	66.90	66.90	1.00	74550.00	4.99
CENTRALPHL	14.80	14.80	1.00	35000.00	0.52
CNATEX	11.20	11.20	1.00	700000.00	7.84
DACCADYE	19.50	19.50	1.00	26000.00	0.51
DGIC	42.50	42.50	1.00	23000.00	0.98
DUTCHBANGL	64.20	64.20	1.00	1547781.00	99.37
EHL	99.00	92.10	2.00	27500.00	2.67
EMERALDOIL	37.80	37.80	1.00	50000.00	1.89
FINEFOODS	59.00	56.90	5.00	133900.00	7.72
FORTUNE	82.00	79.50	4.00	120000.00	9.76
FUWANGCER	19.00	19.00	1.00	30000.00	0.57
GENNEXT	6.40	6.30	2.00	250000.00	1.59
GHCL	35.10	35.10	1.00	17500.00	0.61
GP	290.00	290.00	1.00	2000.00	0.58
GPHISPAT	54.00	54.00	1.00	15000.00	0.81
HRTEX	127.60	127.60	1.00	39000.00	4.98
ICBAGRANI1	10.10	10.10	1.00	54500.00	0.55
IMAMBUTTON	126.60	126.60	1.00	10000.00	1.27
INDEXAGRO	139.90	139.90	1.00	5000.00	0.70
INTRACO	38.80	38.80	2.00	1200000.00	46.56
IPDC	70.00	59.00	5.00	1440000.00	86.50
JAMUNABANK	21.60	21.60	1.00	5700000.00	123.12
JMISMDL	429.00	429.00	1.00	1500.00	0.64
LHBL	81.30	81.30	1.00	10000.00	0.81
LRGLOBMF1	7.00	7.00	1.00	79000.00	0.55
MEGHNACEM	79.00	79.00	1.00	7500.00	0.59
MEGHNALIFE	67.90	67.90	1.00	10000.00	0.68
MERCANBANK	14.00	14.00	1.00	2500000.00	35.00

Source: NRBCBSL Research

Block Trades

Instrument	Max Price	Min Price	Trade	Trades Quantity	Value (BDT mn)
METROSPIN	42.00	41.00	3.00	168000.00	7.01
MLDYEING	24.90	24.80	2.00	40498.00	1.01
NAHEEACP	74.60	74.60	1.00	10500.00	0.78
NHFIL	50.00	50.00	2.00	36800.00	1.84
ORIONINFU	593.00	593.00	1.00	27000.00	16.01
ORIONPHARM	148.20	121.90	9.00	245535.00	35.67
PRIME1ICBA	8.40	8.40	1.00	70300.00	0.59
PRIMEINSUR	82.80	82.80	3.00	35001.00	2.90
PRIMELIFE	56.90	56.90	1.00	10000.00	0.57
PRIMETEX	41.50	41.50	1.00	20000.00	0.83
PTL	84.00	77.00	3.00	130000.00	10.25
RANFOUNDRY	208.00	208.00	1.00	16000.00	3.33
RENATA	1303.20	1303.20	1.00	556.00	0.73
RUPALILIFE	76.50	76.50	1.00	250000.00	19.13
SALVOCHEM	61.90	61.90	1.00	80000.00	4.95
SEAPEARL	134.80	124.00	5.00	61500.00	7.78
SONALILIFE	56.00	56.00	1.00	30196.00	1.69
SONALIPAPR	660.00	660.00	1.00	12000.00	7.92
SPCL	86.00	86.00	1.00	13000.00	1.12
UNIONCAP	10.30	10.30	1.00	50000.00	0.52
WALTONHIL	1047.70	1047.70	1.00	542.00	0.57
Total=61			118	16518137	771.765

Source: NRBCBSL Research

Disclaimer

This document is published by NRBC Bank Securities Ltd. (NRBCBSL) for information only for its employees and clients. All information and analysis in this Report have been compiled from and analyzed on the basis of NRBCBSL's own research of publicly available documentation and information. NRBCBSL does not represent, warrant, or guarantee that the Report is accurate. NRBCBSL disclaims liability for any direct, indirect, punitive, special, consequential, or incidental damages due to this report or the use of this report. The information and analysis provided in the Report may be impacted by market data outages or errors, both internal and external, and affected by frequent movement of market and events. NRBCBSL, its analysts, and officers confirm that they have not received and will not receive any direct or indirect compensation in exchange for expressing any specific recommendation, opinion, or views in its Report. The information and data provided herein is the exclusive property of NRBCBSL and cannot be redistributed or reused in any form or manner without the prior written consent of NRBCBSL.

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