

Daily Capital Market Synopsis

Tuesday, June 28, 2022



Chart: DSE Broad Index, Source: DSE Website

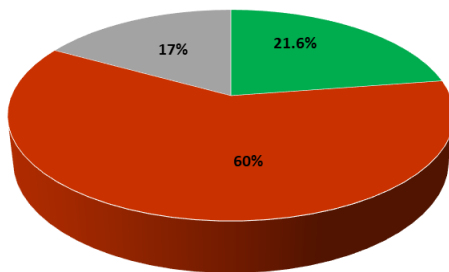
Index Update

Symbol	Today	Point Change	% Change
DSEX	6342.59	22.26	0.4%
DSES	1385.65	4.85	0.4%
DS30	2294.58	9.37	0.4%

Market Performance

Particulars	Today	Prev. Day	% Change
Turnover (BDT mn)	8188.26	7007.63	16.8%
Trade Volume	226815650	181973948	24.6%
Total No. of Trade	167385	149088	12.3%

Source: NRBCBSL Research & DSE Website



Source: NRBCBSL Research

Top 10 Gainers

Code	LTP	YCP	Change	Volume
MEGHNAINS	40.90	37.20	9.9%	33970
YPL	23.60	21.50	9.8%	6145142
KBPPWBIL	13.50	12.30	9.8%	2263464
IMAMBUTTON	122.90	112.40	9.3%	115198
APOLOISPAT	8.50	7.90	7.6%	4356244
ECABLES	148.50	140.00	6.1%	98288
DESHBANDHU	19.40	18.30	6.0%	1373030
AMBEEPHA	491.00	463.40	6.0%	10326
OAL	11.80	11.20	5.4%	1483659
BENGALWTL	23.80	22.70	4.8%	690209

Source: NRBCBSL Research & DSE Website

DSEX grew with improved market participation

DSEX climbed up 22.25 points and closed at 6342.59 points today. Market remained positive the whole session with some fluctuations. Market participation also increased significantly from yesterday's level showing growing investors' interest in the capital market. All the sectors gained value today except Tannery Industries and Miscellaneous sectors. Market may have started a short-term positive trend before the upcoming Eid vacation. Though this trend may hit some set backs due to the June closing adjustments. In terms of technical analysis, DSEX may be forming a short turnback from a support level and heading towards a short-term resistance at around 6360 points. Market may remain positive but volatile tomorrow reflecting the June ending point. On the Macro news front, The government's borrowing from savings certificates and banks to meet the budget deficit was slow but towards the end of the current fiscal year, the borrowing from the banking system has risen sharply.

Market activity increased significantly today than the previous day generating a trade volume of 226815650 from a total trade of 167385, raising BDT 8188.26mn turnover, which is around 17% higher than the last day.

SQURPHARMA, BRACBANK, DELTALIFE, BEACONPHAR, TITASGAS mainly moved the index positively. On the other hand, BXPHARMA, FORTUNE, UCB, PUBALIBANK, NATLIFEINS were the negative forces today.

MEGHNAINS, YPL, KBPPWBIL, IMAMBUTTON, APOLOISPAT were among the top gainers and IPDC, QUASEMIND, SALAMCRST, NEWLINE, PROGRESLIF were among the top companies to lose price today.

Quazi Naureen Ahmed

Market Value

Particulars	Today	Prev. Day	% Change
M. Cap	5157489.28	5141236.00	0.3%
Mkt P/E	15.12	15.05	0.5%
Market Cap. To GDP	17.1%	17.1%	0.3%

Source: NRBCBSL Research & DSE Website

Top 10 Losers

Code	LTP	YCP	Change	Volume
IPDC	53.90	55.00	-2.0%	1735819
QUASEMIND	63.80	65.10	-2.0%	810667
SALAMCRST	34.80	35.50	-2.0%	692977
NEWLINE	45.00	45.90	-2.0%	25668
PROGRESLIF	80.40	82.00	-2.0%	19790
JANATAINS	35.30	36.00	-1.9%	374435
CAPMIBBLMF	15.20	15.50	-1.9%	294548
FORTUNE	91.50	93.30	-1.9%	1499550
DAFODILCOM	71.50	72.90	-1.9%	610
GHCL	36.30	37.00	-1.9%	53995

Source: NRBCBSL Research & DSE Website

Sectoral Gain



Source: NRBCBSL Research

Companies with Highest & Lowest P/E

Highest

Company	P/E
LIBRAINFU	754.4
LEGACYFOOT	727.5
BANGAS	709.5
AMBEEPHA	497.6
EASTRN LUB	489.0
APEXTANRY	395.1
EMERALDOIL	366.7
ARGONDENIM	360.0
BEACHHATCH	335.3
AL-HAJTEX	298.5

Source: NRBCBSL Research

Lowest

Company	P/E
SOUTHEASTB	2.7
JAMUNABANK	3.2
EBLN RBMF	3.6
MERCANBANK	4.1
DHAKABANK	4.6
FIRSTSBANK	4.6
BANKASIA	4.7
TRUSTB1MF	4.8
PREMIERBAN	5.0
SHAHJABANK	5.1

Source: NRBCBSL Research

Top 10 Blue Chip Companies

Company	LTP	YCP	Change	Value (BDT mn)
DELTALIFE	128.60	123.30	4.3%	176.32
TITASGAS	41.80	40.40	3.5%	56.99
BRACBANK	40.50	39.60	2.3%	102.29
BSRMLTD	96.20	94.70	1.6%	4.73
BEACONPHAR	259.70	257.10	1.0%	18.45
ISLAMIBANK	33.00	32.70	0.9%	10.26
POWERGRID	56.70	56.30	0.7%	42.13
SQURPHARMA	217.20	215.80	0.7%	93.36
GPHISPAT	53.10	52.80	0.6%	35.69
MPETROLEUM	203.00	202.00	0.5%	5.01

Source: NRBCBSL Research

Top 10 Turnover Leaders

Company	LTP	YCP	Change	Value (BDT mn)
SPCERAMICS	54.70	51.80	5.6%	301.295
BEXIMCO	131.90	132.30	-0.3%	197.75
FUWANGFOOD	25.40	25.40	0.0%	171.499
DELTALIFE	128.40	123.30	4.1%	148.077
MONNOFABR	28.90	28.00	3.2%	124.192
YPL	23.40	21.50	8.8%	120.514
FORTUNE	91.50	93.30	-1.9%	119.919
RAKCERAMIC	50.50	49.40	2.2%	101.74
SALVOCHEM	67.20	67.90	-1.0%	97.445
BSC	116	115	0.9%	88.612

Source: NRBCBSL Research

Block Trades

Instrument	Max Price	Min Price	Trade	Trades Quantity	Value (BDT mn)
ACI	281.30	281.30	1.00	9501.00	2.67
AFCAGRO	25.10	25.10	3.00	345000.00	8.66
AL-HAJTEX	116.50	116.40	3.00	55100.00	6.42
ALIF	14.20	14.20	1.00	220543.00	3.13
ANWARGALV	445.00	445.00	4.00	21225.00	9.45
BEACONPHAR	252.00	252.00	1.00	2000.00	0.50
BEXGSUKUK	96.00	96.00	4.00	150000.00	14.40
BEXIMCO	137.90	133.20	3.00	12330.00	1.66
BRACBANK	40.10	39.60	8.00	953498.00	37.95
CNATEX	10.40	10.40	1.00	200000.00	2.08
DELTALIFE	134.00	124.00	2.00	11900.00	1.52
FAREASTLIF	90.90	90.90	1.00	11000.00	1.00
GSPFINANCE	30.60	30.60	1.00	31000.00	0.95
HRTEX	101.60	95.50	3.00	156000.00	15.20
IMAMBUTTON	114.00	114.00	3.00	91000.00	10.37
INTRACO	21.80	21.80	1.00	32000.00	0.70
IPDC	58.00	58.00	1.00	100000.00	5.80
JAMUNABANK	22.00	22.00	1.00	6500000.00	143.00
KTL	28.60	28.50	16.00	1065200.00	30.37
METROSPIN	26.70	26.60	3.00	332000.00	8.85
ORIONINFU	92.00	82.60	2.00	44200.00	3.76
PADMALIFE	50.00	50.00	1.00	25000.00	1.25
PRIMEINSUR	94.00	91.20	18.00	828750.00	76.66
PROGRESLIF	84.00	84.00	1.00	6000.00	0.50
PTL	80.00	80.00	1.00	300000.00	24.00
SAIFPOWER	33.00	33.00	1.00	61000.00	2.01
SALVOCHEM	72.50	68.50	4.00	163000.00	11.57
SHASHADNIM	29.40	29.40	1.00	18500.00	0.54
SHURWID	22.70	22.70	1.00	89500.00	2.03
SILCOPHL	28.60	25.50	3.00	225300.00	5.81
SONALIPAPR	520.00	520.00	2.00	12050.00	6.27
SONARGAON	48.00	48.00	1.00	28500.00	1.37
SPCERAMICS	52.30	52.30	1.00	175000.00	9.15
SQURPHARMA	216.80	216.80	1.00	3000.00	0.65
UTTARABANK	23.70	23.70	1.00	6000000.00	142.20
VFSTD	24.80	24.80	2.00	49000.00	1.22
WALTONHIL	1080.80	1080.80	1.00	14000.00	15.13
YPL	22.80	22.80	1.00	50000.00	1.14
Total = 38			104	18392097	609.93

Major News

National Economy

Revenue collection witnesses nearly 15pc growth in 11 months

The overall revenue collection by the National Board of Revenue during the first 11 months (July-May) of the current fiscal year witnessed a healthy growth of 14.93 per cent totalling Taka 2,52,920.76 crore. During the first 11 months of the last fiscal year (FY21), the revenue collection totalled Taka 2,20,072 crore.

News Link: <https://www.newagebd.net/article/174373/vat-collection-from-large-cos-rises-in-july-may>

World Bank to give Bangladesh \$18b IDA loans in next five years

Inflows of foreign assistance will continue to go up, with Bangladesh receiving \$18 billion from the World Bank's soft loan window International Development Association (IDA) alone in the next five years. The Washington-based lender will provide the country with fresh loans amounting to \$10 billion – \$2 billion a year – during the time and will also release \$8.24 billion in the pipeline, according to a draft of the Country Partnership Framework (CPF) programme for FY23-FY27.

News Link: <https://www.tbsnews.net/economy/world-bank-give-bangladesh-18b-ida-loans-next-five-years-448418>

Country turns again to IMF after a decade

After the lapse of a decade, Bangladesh is likely to borrow funds from the International Monetary Fund (IMF) to narrow its budget deficit, seen as a bit high in current context. Ministry of Finance (MoF) officials said Monday they had opened negotiations with the Washington-based lender on the potential budgetary support.

News link: <https://today.thefinancialexpress.com.bd/first-page/country-turns-again-to-imf-after-a-decade-1656353284>

Govt's bank borrowing jumps in June

The government's borrowing from savings certificates and banks to meet the budget deficit was slow but towards the end of the current fiscal year, the borrowing from the banking system has risen sharply. In the first 11 months through May, the government received a net loan of Tk32,652 crore but the borrowing jumped to Tk15,265 crore in just 22 days of June.

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