Daily Capital Market Synopsis

Thursday, March 30, 2023

Source: DSE Broad Index, Source: DSE Website

Index Update

Symbol	Today	Point Change	% Change
DSEX	6206.80	10.05	0.16%
DSES	1349.33	1.64	0.12%
DS30	2209.44	2.45	0.11%

Market Performance

Particulars	Today	Prev. Day	% Change
Turnover (BDT mn)	6668.35	3826.82	74.3%
Trade Volume	82443219	57217932	44.1%
Total No. of Trade	110516	85395	29.4%

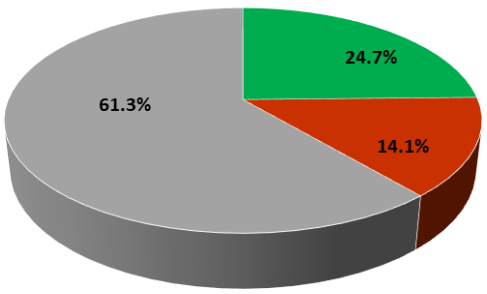
Source: NRBCBSL Research & DSE Website

Market Value

Particulars	Today	Prev. Day	Change
M. Cap	7623663.12	7618300.594	0.1%
Mkt P/E	19.01	19.00	0.1%
Market Cap. To GDP	19.2%	19.2%	0.1%

Source: NRBCBSL Research

DSEX Strength



Source: NRBCBSL Research & DSE Website

Market resumed surging with swelled up volume

DSEX flew up **10.05** points and **6206.8** points today. Market participation soared up as well from yesterday's level reflecting investors' drive to catch the next upward rally. Market participation improved significantly from yesterday's level. Yesterday's market participation was 3826.82 mn and it increased today than the previous day raising BDT **6668.34 mn** turnover which is **74.3% higher** than the last day. Investors gained confidence in investing thanks to the proposal to alter the Bank Companies Act to exclude bonds and debentures from the banks' exposure to the capital markets. In term of technical analysis, index is galloping towards the next resistance at around 6240 points. DSEX may get some momentum from this level. In term of capital market news front, corporate bonds and debentures will not be a part of the banking companies' capital market exposure, according to the modified bill to amend the Bank Companies Act. All corporate bonds and debentures have been excluded from the banks' investment portfolio components that in total cannot exceed 25% of a bank's total equity for the sake of the development of the bond market, reads the rationale part of the proposed amendment.

Almost all the sectors ended positive except Paper & Printing, Tannery, Miscellaneous, Fuel & Power.

UNIQUEHRL, GENEXIL, JHRML mainly moved the index positively. On the other hand, SONALIPAPR, BEACONPHAR, PRIMELIFE were the negative forces today.

GEMINISEA, TOSRIFA, MONOSPOOL were among the top gainers. On the other hand, PRIMELIFE, HAKKANIPUL, GQBALLPEN were among the top companies to lose price today.

SME Market Update

DSMEX gained **37.99 points** today and ended at **1132.68 points** which was **3.47% higher** than yesterday. Market participation increased from yesterday's level. Today's market participation was **31.43 mn** which was **86.6% higher** than yesterday.

ACHIASF, WONDERTOYS, KBSEED were among the top gainers.

Sayem Ahmed Lasker

SME Market Update

Index Update

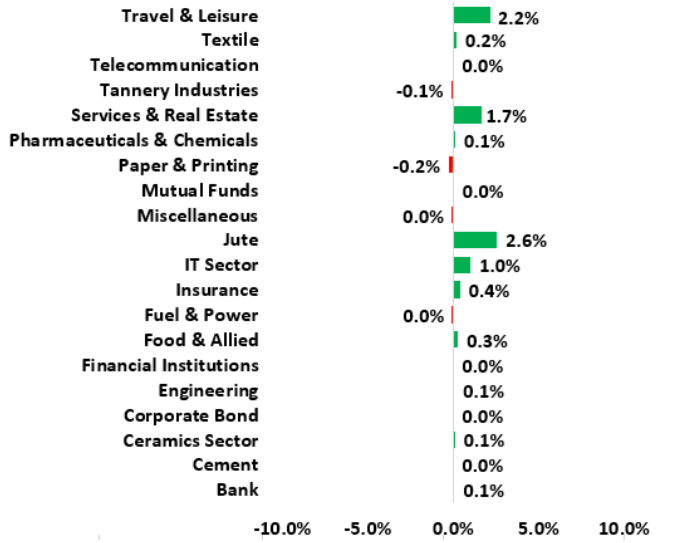
Symbol	Today	Point Change	% Change
DSMEX	1,132.68	37.99	3.47%

SME Market Performance

Particulars	Today	Prev. Day	% Change
Turnover (BDT mn)	31.43	16.85	86.6%
Trade Volume	1556696	814265	91.2%
Total No. of Trade	1094	705	55.2%

Source: NRBCBSL Research & DSE Website

Sector Gain



Watch List

Code	TCP	YCP	Change	Volume
EHL	108.70	104.90	3.6%	3220572
METROSPIN	31.30	30.80	1.6%	1149685
ITC	35.00	35.00	0.0%	1168339
BDCOM	40.80	40.60	0.5%	2435141
GENEXIL	97.10	93.80	3.5%	3577831
ORIONPHARM	79.60	79.60	0.0%	153004
BDCOM	40.80	40.60	0.5%	2435141
OLYMPIC	155.40	154.10	0.8%	755775
UNIQUEHRL	76.00	72.40	5.0%	5572451
MEGHNALIFE	74.00	73.20	1.1%	1015590

Source: NRBCBSL Research

Top 10 Gainers

Code	TCP	YCP	Change	Volume
GEMINISEA	528.2	485.7	8.8%	909,619
TOSRIFA	20.7	19.3	7.3%	1,231,890
MONOSPOOL	258.9	242.9	6.6%	169,429
NAVANACNG	24	22.9	5.7%	540,818
UNIQUEHRL	76	72.4	5.0%	5,572,451
BDTHAI	14	13	4.6%	749,239
MIRACLEIND	27.9	26.8	4.1%	503,116
SONALIANSH	420.6	404.7	3.9%	64,039
MONNOAGML	955.7	920.3	3.8%	48,273
AMBEEPHA	502	484.4	3.6%	16,600

Top 10 Losers

Code	TCP	YCP	Change	Volume
PRIMELIFE	56.5	59.8	-5.5%	102,106
HAKKANIPUL	55.9	58.5	-4.4%	315,561
GQBALLPEN	83.6	87.2	-4.1%	59,260
IMAMBUTTON	84.3	87.6	-3.8%	83,669
SHYAMPSUG	86.6	89.6	-3.3%	20,348
BANGAS	112.3	116	-3.2%	50,646
BDWELDING	25.8	26.6	-3.0%	239,573
SAMATALETH	67.4	69.3	-2.7%	248,243
STANCERAM	110	113.3	-2.7%	2,461
SONALIPAPR	624.30	641.5	-2.7%	99,178

Source: NRBCBSL Research

Companies with Highest & Lowest P/E

Highest

Company	P/E
FINEFOODS	1900
WALTONHIL	1114.57
SAMATALETH	842.5
AFTABAUTO	612.5
BANGAS	467.92
KAY&QUE	429.62
DELTASPINN	425
AMBEEPHA	418.33
SSSTEEL	415
MONNOAGML	351.36

Lowest

Company	P/E
MERCANBANK	3.14
SOUTHEASTB	3.72
PUBALIBANK	3.86
JAMUNABANK	3.93
PREMIERBAN	3.93
SHAHJABANK	4.28
GIB	4.3
DHAKABANK	4.97
EXIMBANK	4.97
MTB	4.98

Top 10 Blue Chip Companies

Company	LTP	YCP	Change%	Value (BDT mn)
UNIQUEHRL	76	72.4	4.97	417.938
DELTALIFE	143.9	141.8	1.48	20.422
OLYMPIC	155.4	154.1	0.84	117.037
SEAPEARL	295.60	293.5	0.72	184.798
ISLAMIBANK	33	32.9	0.3	0.989
BATBC	518.7	518.7	0	0.168
BBSCABLES	49.9	49.9	0	0.017
BEXIMCO	115.6	115.6	0	0.014
BRACBANK	38.5	38.5	0	0.07
BSCCL	218.9	218.9	0	0.107

Source: NRBCBSL Research

Top 10 Turnover Leaders

Company	LTP	YCP	Gain	Value (BDT mn)
GEMINISEA	528.2	485.7	8.8%	477.972
UNIQUEHRL	76	72.4	5.0%	417.938
EHL	108.7	104.9	3.6%	345.189
GENEXIL	97.1	93.8	3.5%	344.962
BSC	127.4	127.8	-0.3%	185.437
SEAPEARL	295.6	293.5	0.7%	184.798
AAMRANET	63	61.4	2.6%	172.369
ADNTEL	163.6	164.7	-0.7%	168.455
RUPALILIFE	92.7	90.7	2.2%	131.658
OLYMPIC	155.4	154.1	0.8%	117.037

Source: NRBCBSL Research

EPS Declaration (OCTOBER-DECEMBER 22)

Instrument	Q2-22	Q2-21	Change
RAHIMAFOOD	0.35	-0.06	683.33%
SALAMCRST	0.18	0.03	500.00%
EASTRNLUB	6.26	1.22	413.11%
CROWNCEMNT	0.99	0.21	371.43%
UNIQUEHRL	1	0.27	270.37%
APEXFOODS	1.57	0.43	265.12%
SAVAREFR	-0.71	-0.2	255.00%
FUWANGFOOD	0.1	0.03	233.33%
AAMRANET	1.31	0.41	219.51%
ANLIMAYARN	0.07	-0.08	187.50%
SEAPEARL	2.23	0.81	175.31%
NFML	0.03	-0.04	175.00%
DOREENPWR	-1.23	2.08	159.13%
FEKDIL	0.52	0.21	147.62%
INTRACO	0.49	0.21	133.33%
ECABLES	0.21	-0.8	126.25%
AFTABAUTO	0.01	-0.2	105.00%
SONALIANSH	0.9	0.44	104.55%
ETL	0.1	0.05	100.00%
KPPL	-0.06	-1.96	96.94%
TOSRIFA	0.32	0.27	96.94%
JAMUNAOIL	9.29	4.76	95.17%
NTLTUBES	0.31	0.16	93.75%
SAPORTL	0.42	0.22	90.91%
HWAWELLTEX	1.45	0.76	90.79%

Instrument	Q2-22	Q2-21	Change
BDSERVICE	-0.17	-1.78	90.45%
OLYMPIC	2.93	1.54	90.26%
MONOSPOOL	1.61	0.85	89.41%
SPCERAMICS	0.15	0.08	87.50%
APEXFOOT	2.79	1.5	86.00%
ACTIVEFINE	-0.01	-0.06	83.33%
KBPPWBIL	-0.01	-0.05	80.00%
BANGAS	0.07	0.04	75.00%
DOMINAGE	0.26	0.15	73.33%
GHCL	-0.45	-0.26	73.08%
SHYAMPSUG	-7.39	-22.53	67.20%
MEGCONMILK	-0.571	-1.74	67.18%
ADNTEL	1	0.6	66.67%
SHASHADNIM	0.77	0.47	63.83%
ORIONINFU	0.4	0.26	53.85%
GQBALLPEN	-1.19	-0.78	52.56%
USMANIAGL	-0.91	-0.6	51.67%
STYLECRAFT	-1.16	-2.37	51.05%
PADMAOIL	8.92	5.92	50.68%
BEACONPHAR	1.61	1.07	50.47%
AMBEEPHA	0.35	0.24	45.83%
MONNOAGML	0.69	0.49	40.82%
CENTRALPHL	-0.06	-0.1	40.00%
FARCHEM	-0.18	-0.13	38.46%
MJLBD	2.05	1.5	36.67%

Source: NRBCBSL Research & DSE website

EPS Declaration (OCTOBER-DECEMBER 22)

Instrument	Q2-22	Q2-21	Change
SKTRIMS	0.34	0.25	36.00%
DSHGARME	0.34	0.25	36.00%
RNSPIN	-0.02	-0.03	33.33%
ZEALBANGLA	-12.2	-17.12	28.74%
MPETROLEUM	8.34	6.51	28.11%
TITASGAS	0.93	0.73	27.40%
ITC	0.63	0.5	26.00%
DULAMIACOT	-0.2	-0.27	25.93%
BSCCL	4.01	3.33	20.42%
KOHINOOR	2.97	2.5	18.80%
HRTEX	0.54	0.46	17.39%
BENGALWTL	0.15	0.13	15.38%
SILCOPHL	0.15	0.13	15.38%
AGNISYSL	0.31	0.27	14.81%
LOVELLO	0.17	0.15	13.33%
MARICO	30.93	27.35	13.09%
GEMINISEA	3.01	2.7	11.48%
SAMORITA	0.2	0.18	11.11%
EHL	2.09	1.89	10.58%
SQURPHARMA	5.78	5.24	10.31%
JUTESPINN	-11.76	-10.83	8.59%
GBBPOWER	0.27	0.25	8.00%
BDAUTOCA	0.15	0.14	7.14%
TUNGHAI	-0.13	-0.14	7.14%
DAFODILCOM	0.19	0.18	5.56%
ACMELAB	2.52	2.4	5.00%
METROSPIN	0.47	0.45	4.44%
ADVENT	0.29	0.28	3.57%
EGEN	0.38	0.37	2.70%
AIL	0.39	0.38	2.63%
LRBDL	0.5	0.49	2.04%
GENEXIL	1.22	1.21	0.83%
TAMIJTEX	1.86	1.85	0.54%
KAY&QUE	0.11	0.11	0.00%
OAL	-0.04	-0.04	0.00%
TUNGHAI	-0.13	-0.13	0.00%
MEGHNAPET	-0.06	-0.06	0.00%
DELTASPINN	-0.01	-0.01	0.00%
IBNSINA	5.9	5.97	-1.17%
NAVANAPHAR	0.77	0.78	-1.28%

Instrument	Q2-22	Q2-21	Change
ACI	1.96	2	-2.00%
HAKKANIPUL	-0.37	-0.38	-2.63%
BPPL	0.7	0.72	-2.78%
SINOBANGLA	0.28	0.29	-3.45%
ACIFORMULA	2.49	2.59	-3.86%
BDCOM	0.45	0.47	-4.26%
APEXSPINN	1.1	1.16	-5.17%
RANFOUNDRY	0.99	1.05	-5.71%
INDEXAGRO	1.05	1.12	-6.25%
BEACHHATCH	0.29	0.31	-6.45%
ISNLTD	0.13	0.14	-7.14%
QUEENSOUTH	0.25	0.27	-7.41%
AMCL(PRAN)	1.92	2.1	-8.57%
ANWARGALV	2.01	2.27	-11.45%
BPML	0.55	0.65	-15.38%
BERGERPBL	14.73	17.52	-15.92%
BEXIMCO	3.6	4.45	-19.10%
SIMTEX	0.21	0.26	-19.23%
NAVANACNG	0.04	0.05	-20.00%
JHRML	0.52	0.66	-21.21%
AOL	0.33	0.42	-21.43%
MIRAKHTER	0.76	0.99	-23.23%
ALIF	0.13	0.17	-23.53%
SUMITPOWER	0.76	1	-24.00%
RDFOOD	0.28	0.37	-24.32%
GENNEXT	0.03	0.04	-25.00%
MONNOFABR	0.03	0.04	-25.00%
ACMEPL	0.38	0.52	-26.92%
BXPHARMA	2.77	3.84	-27.86%
BARKAPOWER	0.56	0.78	-28.21%
UPGDCL	4.84	6.85	-29.34%
KDSALTD	0.44	0.63	-30.16%
ORIONPHARM	1.19	1.72	-30.81%
MHSML	0.5	0.73	-31.51%
PAPERPROC	0.91	1.33	-31.58%
MEGHNACEM	0.34	0.5	-32.00%
GP	22.29	34.22	-34.86%
RENATA	7.66	11.89	-35.58%
SILVAPHL	0.14	0.22	-36.36%
MATINSPINN	1.81	2.86	-36.71%
DSSL	0.18	0.3	-40.00%

Source: NRBCBSL Research & DSE website

EPS Declaration (OCTOBER-DECEMBER 22)

Instrument	Q2-22	Q2-21	Change
ATLASBANG	-0.82	-0.57	-43.86%
BDLAMPS	1.74	3.15	-44.76%
RENWICKJA	-5.6	-3.85	-45.45%
ZAHINTEX	-2.43	-1.62	-50.00%
PDL	0.05	0.1	-50.00%
AFCAGRO	0.02	0.04	-50.00%
DESHBANDHU	0.1	0.2	-50.00%
BSRMLTD	1.82	3.82	-52.36%
BSRMSTEEL	1.17	2.46	-52.44%
SHEPHERD	0.14	0.32	-56.25%
ARGONDENIM	0.03	0.07	-57.14%
SQUARETEXT	0.92	2.38	-61.34%
KPCL	-0.03	-0.08	-62.50%
WALTONHIL	2	5.45	-63.30%
MLDYEING	0.04	0.11	-63.64%
WATACHEM	0.53	1.51	-64.90%
VFSTDL	0.17	0.49	-65.31%
ICB	0.3	0.98	-69.39%
AAMRATECH	0.16	0.6	-73.33%
HFL	0.04	0.15	-73.33%
EPGL	0.14	0.53	-73.58%
MONNOCERA	0.11	0.43	-74.42%
AMANFEED	0.23	0.91	-74.73%
IFADAUTOS	0.13	0.53	-75.47%
PENINSULA	0.08	0.33	-75.76%
JMISMDL	0.32	1.5	-78.67%
NAHEEACP	0.12	0.61	-80.33%
SONARGAON	0.05	0.28	-82.14%
FINEFOODS	0.004	0.039	-89.74%
COPPERTECH	0.05	0.51	-90.20%
FORTUNE	0.07	0.75	-90.67%
SAIHAMCOT	0.04	0.44	-90.91%
BBSCABLES	0.09	1.14	-92.11%
DACCADYE	0.03	0.42	-92.86%
NPOLYMER	0.05	0.71	-92.96%
MAKSONSPIN	0.03	1.01	-97.03%
NTC	0.14	5.21	-97.31%
BBS	0.02	0.93	-97.85%
ALLTEX	0.02	1.36	-98.53%
ACFL	-0.02	0.29	-106.90%

Instrument	Q2-22	Q2-21	Change
GPHISPAT	-0.12	1.08	-111.11%
PHARMAID	-0.76	5.53	-113.74%
ZAHEENSPIN	0.03	-0.2	-115.00%
CVOPRL	0.12	-0.64	-118.75%
DESCO	-0.08	0.37	-121.62%
YPL	-0.21	0.64	-132.81%
PTL	-0.01	0.03	-133.33%
IBP	-0.08	0.17	-147.06%
MALEKSPIN	-0.54	1.1	-149.09%
GOLDENSON	-0.16	0.16	-200.00%
SPCL	-1.38	1.14	-221.05%
ESQUIRENIT	-0.81	0.63	-228.57%
SAIHAMTEX	-0.62	0.41	-251.22%
RUNNERAUTO	-2.08	0.96	-316.67%
AL-HAJTEX	-0.21	0.09	-333.33%
RAHIMTEXT	-2.71	0.94	-388.30%
QUASEMIND	-0.26	0.09	-388.89%
LEGACYFOOT	-0.17	0.03	-666.67%
POWERGRID	-5.51	0.93	-692.47%
PRIMETEX	-2.12	0.16	-1425.00%
BDTHAI	-0.15	0.01	-1600.00%
AZIZPIPES	-0.98	-0.04	-2350.00%
APEXTANRY	-1.95	0.07	-2885.71%
SAFKOSPINN	-1.71	0.02	-8650.00%

Block Trades

Instrument	Max Price	Min Price	Trade	Trades Quantity	Value (BDT mn)
RENATA	1217.9	1217.9	6	547987	667.393
UNILEVERCL	3150	3150	2	100000	315
SAIFPOWER	29.70	26.80	5	9370350.00	277.95
MATINSPINN	77.6	77	2	968500	75.15
ANWARGALV	231	231	2	284400	65.696
ORIONPHARM	87.50	76.10	6	740600.00	64.39
SONALIPAPR	680	679.5	2	87500	59.486
GEMINISEA	528.1	485.7	14	97499	50.784
SQURPHARMA	203.8	202.6	32	135600	27.526
AL-HAJTEX	196.00	180.00	17	101521.00	18.79
SEAPEARL	295	270.3	4	62999	17.661
ACMELAB	76.5	76.5	3	200000	15.3
FORTUNE	74.9	70	2	199591	14.533
HRTEX	117	115	2	123000	14.381
MERCANBANK	13.60	13.60	1	943721.00	12.84
PRAGATILIF	114	114	2	100000	11.4
AOL	36.4	32.9	4	299658	10.144
MALEKSPIN	29.8	24.5	2	324000	9.528
UNIONINS	43.30	43.30	1	183000.00	7.92
POWERGRID	47.20	47.20	8	150000.00	7.08
IPDC	58	54.2	3	119250	6.853
BDCOM	44.4	44.4	1	143800	6.385
ACFL	26.10	26.10	1	233000.00	6.08
BATBC	518	479.8	2	11696	5.868
BEXIMCO	107.7	104.1	6	46765	4.925
ROBI	27	27	3	130000	3.51
RECKITTBEN	4760	4550	2	734	3.445
LHBL	62.2	61.7	5	53200	3.293
BEACONPHAR	260	260	1	10000	2.6
UNIQUEHRL	75.9	72.5	3	30143	2.214
RUPALILIFE	97	97	1	20500	1.988
GREENDELT	64.2	64	3	28450	1.825
LOVELLO	41.4	34.2	3	47500	1.75
GENEXIL	99.7	94.2	2	17000	1.64
NBL	8.2	8.2	2	200000	1.64
AAMRANET	64.20	63.90	2	21780.00	1.40
SINGERBD	136.8	136.8	2	10000	1.368
EASTLAND	23.70	23.70	1	55100.00	1.31
MAKSONSPIN	20.2	20.2	2	58600	1.184
OLYMPIC	160	160	1	7000	1.12

Source: NRBCBSL Research

Block Trades

Instrument	Max Price	Min Price	Trade	Trades Quantity	Value (BDT mn)
BSCCL	237.50	234.50	2	4239.00	1.00
PRIMETEX	26.30	26.30	1	34285.00	0.90
REPUBLIC	31.4	31.4	1	28577	0.897
NAHEEACP	58.9	58.9	1	14800	0.872
BERGERPBL	1700	1700	1	500	0.85
ADNTEL	150	150	1	5500	0.825
ACIFORMULA	145.00	145.00	1	5000.00	0.73
MJLBD	86.5	86.5	1	8000	0.692
ACI	260	260	1	2127	0.553
BBSCABLES	45.00	45.00	1	12180.00	0.55
TUNGHAI	5.3	5.3	1	100000	0.53
EBL	30.8	30.8	1	17000	0.524
PTL	69.3	69.3	1	7500	0.52
NCCBANK	13.00	13.00	1	39000.00	0.51
HFL	15.80	15.80	1	32000.00	0.51
MHSML	25.90	25.90	1	19532.00	0.51
GPHISPAT	40.4	40.4	1	12500	0.505
NPOLYMER	45.9	45.9	1	11000	0.505
CONFIDCEM	83.5	83.5	1	6000	0.501
SILVAPHL	19.5	19.5	1	25650	0.5
Total= 60			**184**	**16649834**	**1816.310**

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

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

Motijheel Extension Office
Swantex Building (Part of
2nd Floor, South-West Side)
9/I, Motijheel C/A, Dhaka-1000
Tel: 880257160701

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