Daily Capital Market Synopsis

Thursday, October 6, 2022

Source: DSE Broad Index, Source: DSE Website

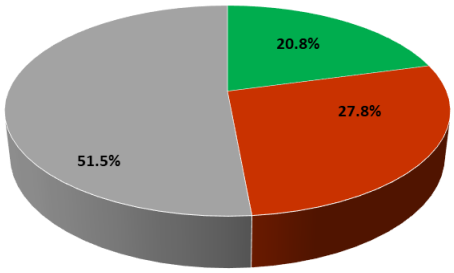
Index Update

Symbol	Today	Point Change	% Change
DSEX	6569.51	24.68	0.38%
DSES	1443.48	12.99	0.91%
DS30	2361.57	18.52	0.79%

Market Performance

Particulars	Today	Prev. Day	% Change
Turnover (BDT mn)	11698.38	12901.95	-9.3%
Trade Volume	186260414	203742147	-8.6%
Total No. of Trade	188351	184380	2.2%

Source: NRBCBSL Research & DSE Website



Source: NRBCBSL Research

Top 10 Gainers

Code	TCP	YCP	Change	Volume
AFTABAUTO	29	26.4	9.8%	1,093,936
NAVANACNG	29.2	26.6	9.8%	2,739,398
MONOSPOOL	267.2	245.7	8.8%	323,308
BEACONPHAR	380.8	350.3	8.7%	620,438
BDCOM	71.2	65.5	8.7%	1,861,092
PHARMAID	905.5	842.4	7.5%	65,814
SONALIANSH	667.4	620.9	7.5%	46,208
ORIONINFU	753.7	701.4	7.5%	185,954
TAMIJTEX	227.8	213.3	6.8%	312,924
GENNEXT	6.6	6.2	6.5%	3,014,626

Source: NRBCBSL Research & DSE Website

Market swelled in the midst of shrinking volume

Market restored 24.68 points and closed at 6569.50 points. Market started positive and soon went on a fluctuating journey but ended positive. Market participation got sluggish today after yesterdays' moderate improvement. Yesterday's market participation was 12901.95mn and it decreased today than the previous day raising BDT 11698.38mn turnover which is around 9% lower than the last day. In term of technical analysis, DSEX went near a resistance at around 6600 points and closed just above another resistance at around 6565 points. On term of macroeconomic news fronts, the slow-down in demand and stronger US dollar worldwide has pushed down cotton prices in the international market, Bangladesh witnessed a record 9.5 per-cent inflation in August, the highest in 12 years, due to adverse effects of fuel price hike, said Bangladesh Bureau of Statistics (BBS). However, despite record inflation in August, it was possible to rein it in September. Inflation was 9.1 percent in September. Planning Minister MA Mannan blamed the Russia-Ukraine war and the unstable world situation in recent months for high inflation.

All the sectors were ended in the red zone except Jute, IT, Paper & Printing, pharmaceuticals and Textile.

BEACONPHAR, ORIONPHARM, ORIONINFU, BXPHARMA, KOHINOOR mainly moved the index positively. On the other hand, UNIQUEHRL, ACMELAB, BEXIMCO, LHBL, BSC were the negative forces today.

AFTABAUTO, NAVANACNG, MONOSPOOL, BEACONPHAR, BDCOM were among the top gainers and BDWELDING, MIRAKHTER, HAKKANIPUL, NA-HEEACP, PENINSULA were among the top companies to lose price today.

Sayem Ahmed Lasker

Market Value

Particulars	Today	Prev. Day	Change
M. Cap	5216764.563	5209965.663	0.1%
Mkt P/E	15.50	15.48	0.1%
Market Cap. To GDP	17.3%	17.3%	0.1%

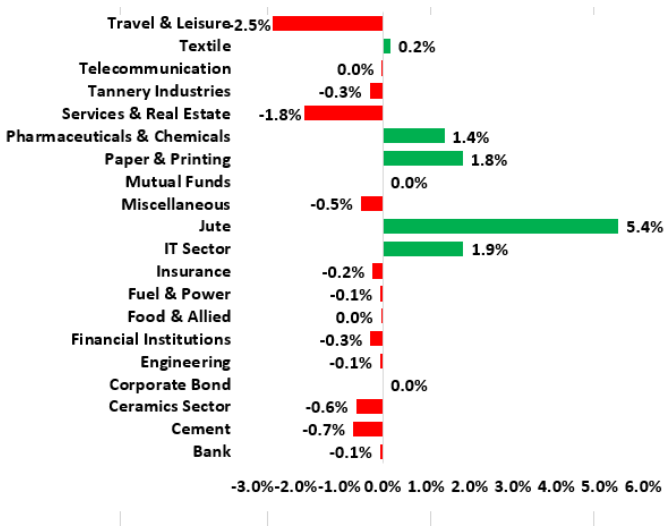
Source: NRBCBSL Research & DSE Website

Top 10 Losers

Code	TCP	YCP	Change	Volume
BDWELDING	24.3	25.7	-5.4%	595,528
MIRAKHTER	57.1	59.5	-4.0%	490,410
HAKKANIPUL	67.7	70.3	-3.7%	369,811
NAHEEACP	68.7	71	-3.2%	1,781,214
PENINSULA	36.1	37.3	-3.2%	1,434,106
BPML	84.7	87.4	-3.1%	1,212,367
UNIQUEHRL	70.4	72.6	-3.0%	1,686,679
YPL	26.1	26.9	-3.0%	4,712,738
SAPORTL	36.2	37.3	-2.9%	2,658,943
METROSPIN	47.5	48.9	-2.9%	1,559,754

Source: NRBCBSL Research & DSE Website

Sectoral Gain



Source: NRBCBSL Research

Top 10 Turnover Leaders

Company	LTP	YCP	Gain	Volume
ORIONPHARM	148	143.7	3.0%	1,381.67
BEXIMCO	131.3	131.7	-0.3%	759.568
SONALIPAPR	699.3	668.5	4.6%	442.808
BBS	33.2	32.8	1.2%	416.459
EHL	110.7	112.1	-1.2%	398.392
BSC	157	159.8	-1.8%	335.858
BBSCABLES	60.5	60.4	0.2%	296.719
JHRML	130	132.9	-2.2%	250.152
BEACONPHAR	380.8	350.3	8.7%	232.313
SPCERAMICS	54.5	55.6	-2.0%	225.994

Source: NRBCBSL Research

Companies with Highest & Lowest P/E

Highest

Company	P/E
LEGACYFOOT	733.75
BANGAS	649
EASTRNLUB	550.92
AMBEEPHA	532.4
ORIONINFU	395.3
AL-HAJTEX	351.25
ARGONDENIM	341.25
KAY&QUE	333.59
EMERALDOIL	315.83
BEACHHATCH	312.75

Source: NRBCBSL Research

Lowest

Company	P/E
SOUTHEASTB	2.7
MERCANBANK	3.13
JAMUNABANK	3.5
SHAHJABANK	4.16
PREMIERBAN	4.22
EXIMBANK	4.61
BANKASIA	5.05
NCCBANK	5.19
UTTARABANK	5.22
DHAKABANK	5.23

Source: NRBCBSL Research

Top 10 Blue Chip Companies

Company	LTP	YCP	Change%	Value (BDT mn)
BEACONPHAR	380.8	350.3	8.71	232.313
ORIONPHARM	148	143.7	2.99	1,381.67
BXPHARMA	169.8	168	1.07	56.253
TITASGAS	42.5	42.2	0.71	146.399
POWERGRID	53.3	53.1	0.38	18.986
EBL	32	31.9	0.31	0.355
BBSCABLES	60.5	60.4	0.17	296.719
BSRMLTD	93.1	93	0.11	3.508
BATBC	518.7	518.7	0	5.766
BRACBANK	38.5	38.5	0	0.919

Source: NRBCBSL Research

Top Picks

Company	LTP	YCP	Change%	Value (BDT mn)
BBS	33.20	32.80	1.2%	12254002
NHFIL	52.70	52.50	0.4%	1219155
LHBL	74.00	74.50	-0.7%	1540049
NPOLYMER	62.70	64.00	-2.0%	1994919
NHFIL	52.70	52.50	0.4%	1219155
BEXIMCO	131.30	131.70	-0.3%	5774500
SPCERAMICS	54.50	55.60	-2.0%	4106777
IPDC	62.10	63.60	-2.4%	2329346
ADVENT	28.30	28.90	-2.1%	1935883
LRBDL	41.30	42.10	-1.9%	1468281

Source: NRBCBSL Research

Block Trades

Instrument	Max Price	Min Price	Trade	Trades Quantity	Value (BDT mn)
AAMRATECH	42.80	42.80	1.00	52900.00	2.26
ADNTEL	81.50	77.00	4.00	67029.00	5.37
AL-HAJTEX	143.00	136.00	6.00	112000.00	15.32
ALIF	13.40	13.40	1.00	100000.00	1.34
BBS	31.20	30.00	2.00	55000.00	1.69
BDCOM	65.00	59.60	11.00	1367300.00	82.04
BEACONPHAR	364.00	321.00	4.00	27500.00	9.51
BENGALWTL	25.60	24.50	2.00	140000.00	3.47
BEXIMCO	132.10	132.10	1.00	10000.00	1.32
BSCCL	226.00	226.00	2.00	7700.00	1.74
EHL	112.00	112.00	1.00	4500.00	0.50
EXIM1STMF	5.80	5.80	1.00	244500.00	1.42
FARCHEM	12.50	12.50	1.00	40500.00	0.51
FAREASTLIF	96.00	96.00	1.00	10000.00	0.96
FORTUNE	81.00	80.90	2.00	138700.00	11.23
FUWANGCER	18.50	18.50	1.00	100000.00	1.85
GENEXIL	78.60	78.60	1.00	9000.00	0.71
GSPFINANCE	30.50	30.30	5.00	182500.00	5.54
HRTEX	127.50	127.50	1.00	35000.00	4.46
ICBAGRANI1	10.10	10.10	1.00	68013.00	0.69
IPDC	69.90	62.00	10.00	5025500.00	326.78
JHRML	137.50	137.50	1.00	77000.00	10.59
KOHINOOR	664.00	664.00	1.00	1000.00	0.66
LRGLOBMF1	6.90	6.90	1.00	98134.00	0.68
METROSPIN	51.00	46.50	5.00	160000.00	7.58
MLDYEING	24.80	24.80	1.00	100000.00	2.48
NAHEEACP	70.00	70.00	1.00	50000.00	3.50
OIMEX	19.90	19.90	1.00	200000.00	3.98
ORIONINFU	754.00	701.40	4.00	61000.00	45.56
ORIONPHARM	157.00	131.90	9.00	342100.00	47.98
PRIMEINSUR	82.80	82.80	1.00	6102.00	0.51
QUASEMIND	59.00	59.00	1.00	10000.00	0.59
RENATA	1303.20	1303.20	1.00	428.00	0.56
SIMTEX	19.00	17.30	2.00	300000.00	5.45
SONALIANSH	610.00	610.00	1.00	1500.00	0.92
SONALIPAPR	653.00	650.00	3.00	4000.00	2.60
SQURPHARMA	209.80	209.80	2.00	18080.00	3.79
TOSRIFA	24.20	24.20	1.00	30000.00	0.73
Total=38			95	9256986	616.850

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

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