NRBCBSL Daily Market Update

Tuesday, April 24, 2018

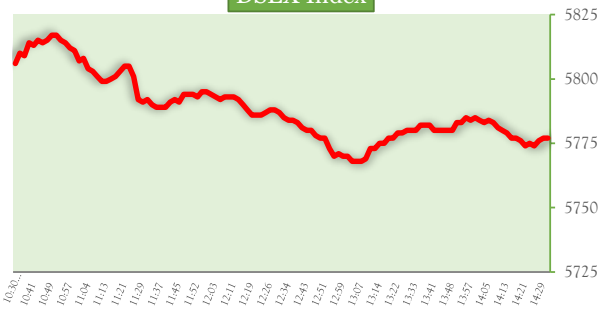
Gainers	85	
Losers	209	
Unchanged	45	

DSEX	5777	-0.5%
Turnover	4953 BDT mn	2.0%

Index Synopsis

	Index	Points Change	% Δ
DSEX	5777.4	-28.8	-0.5%
DSES	1339.9	-8.3	-0.6%
DS30	2164.7	-15.1	-0.7%

DSEX Index



Market Valuation

DSEX – 52 Week H/L	6337/3960	Market P/E (LTM)	16.8x
Market Cap in bn (BDT/USD)	4027/49	Market P/E (Audited)	16.9x
Market Div Yield (360 Days)	2.5%	Market P/E (Annualized)	17.7x

Market Technical

Market RSI	48.6	Support Level 1	5575.0
200 Day's WMA	5986.5	Support Level 2	5400.0
25 Days SMA	5744.0	Resistance Level 1	5900.0
15 Days SMA	5819.0	Resistance Level 2	6100.0

DSEX extended losing streak for third consecutive session!

Following last losing session, the prime index, DSEX, moved downward with 85 gaining stocks and 209 losers at closing. The index had a loss of 0.5% and closed at 5777 while turnover saw a rise of 2.0%. The market was traded at a LTM P/E (Price to Earning) of 16.8x.

On the turnover board, GP gained the number one spot today; c BDT 265.6 mn. Number two and three spots were taken by, UPGDCL (BDT 260.6 mn), and BEXIMCO (BDT 245.6 mn). SALAMCRST led the price gainer board with a 5.8% price gain while TAKAFULINS led the price loser board with a 11.2% loss.

Among the prominent sectors Fuel & Power led the top market cap gainers with 1.3% gain, while Telecommunication led the top market cap losers with 1.7% loss. Telecommunication showed the highest turnover increase of 89.5% while IT Sector showed the highest turnover loss of 32.8%. Bank had the highest contribution of 16.6% in turnover today.

Market is now trading Below the 200 days WMA of 5986.51. Today's market RSI was 48.64.

-Md. Aslam Hossain

Market Movers

Top Gainers

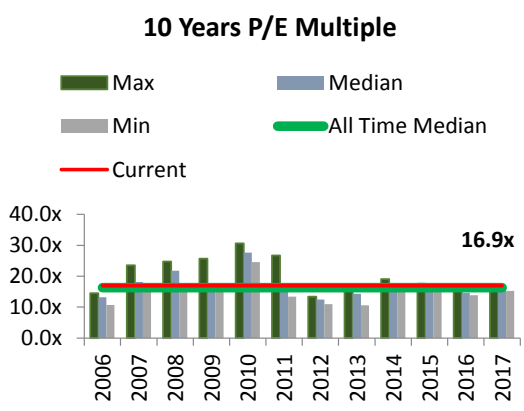
Company	Close Price	% Δ	Turnover (BDT mn)
SALAMCRST	32.8	5.8%	15.2
RDFOOD	16.5	5.8%	34.0
CENTRALINS	22.7	5.1%	0.0
SHASHADNIM	59.9	4.7%	50.4
UCB	19.3	4.3%	69.9
MPETROLEUM	193.6	3.9%	21.4
PRIMEINSUR	17.2	3.6%	0.2
IFIC1STMF	6.2	3.3%	4.5
UPGDCL	186.1	3.3%	260.6
ADVENT	36.7	3.1%	47.1

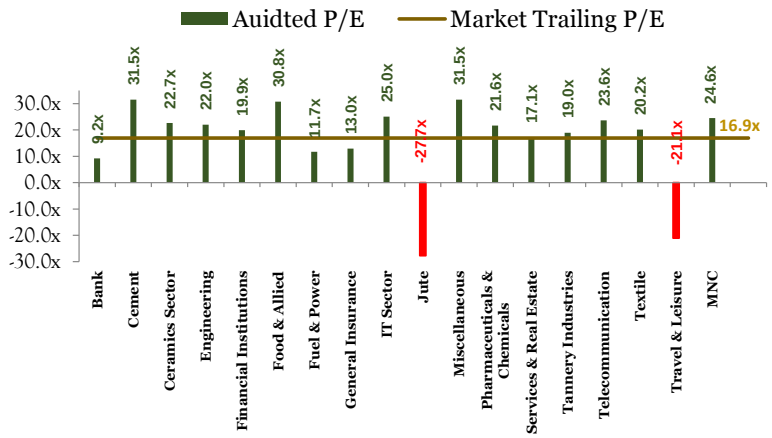
Top Losers

Company	Close Price	% Δ	Turnover (BDT mn)
TAKAFULINS	23.8	-11.2%	0.1
SAVAREFR	165.6	-9.5%	0.0
POPULARLIF	110.0	-7.3%	29.3
SONALIANSH	308.8	-7.3%	40.2
PREMIERLEA	14.5	-7.1%	6.0
PHENIXINS	24.3	-6.9%	1.1
RENWICKJA	691.4	-6.6%	11.7
MONNOSTAF	1554.4	-6.2%	31.4
MONNOCERA	131.7	-5.3%	76.1
FASFIN	12.2	-4.7%	10.8

Turnover Leaders

Company	Close Price	% Δ	Turnover (BDT mn)
GP	474.3	-1.8%	265.6
UPGDCL	186.1	3.3%	260.6
BEXIMCO	30.7	0.3%	245.6
BRACBANK	86.3	-2.9%	183.7
ALARABANK	26.8	-3.6%	140.9
KEYACOSMET	10.2	-1.0%	124.8
SQURPHARMA	311.2	-0.5%	123.4
EASTRNLUB	1378.6	-3.4%	92.9
MONNOCERA	131.7	-5.3%	76.1
QUEENSOUTH	33.6	2.4%	75.1





Notes: T = Turnover, M CAP=Market Capital, Δ=Change, P/E=Price Earnings Ratio, LTM P/E= Based on Last Twelve Months Earnings, Audited P/E=Based on Audited Earnings, Annualized P/E=Based on annualized earnings. P/B=Price to Book Value, RSI=Relative Strength Index, SMA = Simple Moving Average, WMA = Weighted Moving Average, MNC=Multinational Companies. Market Technical is based on analyst's judgement, NM=Not Meaningful, NA=Not Applicable.

NRBCBSL Daily Market Update

Tuesday, April 24, 2018

Sectoral View

Industry	Price/Earning			P/B	M CAP		ROE	Turnover		Contribution in TO		Average TO	
	Annualized	LTM	Audited		BDT (bn)	% Δ		BDT (mn)	% Δ	Yesterday	Today	15 Days	5 Days
Bank	10.0x	9.2x	9.2x	1.1x	609.7	-0.4%	11.6%	751.9	-4.5%	17.9%	16.6%	986	815
Cement	220.4x	52.8x	31.5x	3.4x	125.3	-0.8%	10.7%	42.0	-29.9%	1.4%	0.9%	78	107
Engineering	20.9x	21.8x	22.0x	1.9x	187.8	0.0%	8.8%	389.5	-15.7%	10.5%	8.6%	416	599
Financial Institutions	19.2x	18.7x	19.9x	1.8x	204.3	-1.4%	8.9%	122.3	-31.9%	4.1%	2.7%	148	196
Food & Allied	30.5x	30.9x	30.8x	9.4x	286.6	-0.9%	30.6%	256.2	8.4%	5.4%	5.7%	236	245
Fuel & Power	12.2x	11.5x	11.7x	1.5x	372.9	1.3%	13.1%	707.1	79.1%	9.0%	15.6%	495	365
General Insurance	11.8x	11.7x	13.0x	1.0x	38.9	-0.6%	7.6%	24.8	0.6%	0.6%	0.5%	32	39
Miscellaneous	27.9x	32.2x	31.5x	1.1x	98.7	-0.2%	3.4%	393.9	-20.8%	11.3%	8.7%	591	577
Mutual Funds	11.1x	7.1x	8.2x	NA	42.5	0.2%	NA	66.9	11.3%	1.4%	1.5%	67	78
Pharmaceuticals & Chemicals	20.3x	20.8x	21.6x	3.1x	544.8	-0.2%	14.4%	600.5	15.9%	11.8%	13.2%	604	632
Telecommunication	25.6x	23.9x	23.6x	15.9x	655.7	-1.7%	67.4%	267.6	89.5%	3.2%	5.9%	158	97
Textile	19.9x	20.2x	20.2x	1.0x	113.3	-0.3%	4.9%	447.3	3.4%	9.8%	9.9%	465	624
MNC	26.0x	24.7x	24.7x	10.6x	1121.0	-1.2%	43.4%	361.6	32.5%	6.2%	8.0%	274	231
Market Total	17.7x	16.8x	16.9x	2.0x	4027.4	-0.5%	NA	4953.5	2.0%	100.0%	100.0%	5,516	5,225

Recent Dividend Declaration

Company	Dividend	Record Date
ASIAINS	1.0%C, 0.0%B	17-May-18
EASTLAND	7.5%C, 7.5%B	17-May-18
BNICL	10.0%C, 0.0%B	17-May-18

Right Share

Company	Right offer	Record Date	FV+P=Offer Price

Spot Market Information

Companies
PRIMEFIN
STANDBANKL
PREMIERBAN

Board Meeting for Dividend Declaration

Compa	Meeting Date	LTM Dividend
MARICO	4/25/2018	500.0%C, 0.0%B
HEIDELBCEM	4/24/2018	0.0%C, 0.0%B
EXIMBANK	4/25/2018	15.0%C, 0.0%B
UNIONCAP	4/25/2018	0.0%C, 10.0%B
TRUSTBANK	4/24/2018	0.0%C, 0.0%B
SHAHJABANK	4/25/2018	0.0%C, 0.0%B
NBL	4/30/2018	%C, 0.0%B

Block Market Information

Company	Max Price	Min Price	Trades	Quantity	BDT
AAMRANET	102.3	102.30	1	50,000	5.12
ALARABANK	30.5	30.50	2	10,000,000	305.00
DBH	139.0	137.00	3	203,025	28.16
GP	482.5	477.00	3	50,000	23.94
JAMUNABANK	20.0	20.00	3	860,000	17.20
PTL	44.5	43.50	4	65,000	2.84
SPCL	93.6	93.60	4	37	37.44

Latest IPO Information

Name of The Company:	Indo-Bangla Pharmaceuticals Limited
Price Per Share (In BDT):	10.0
Lot Size:	500.0
Subscription Start:	Suspended
Subscription End:	Suspended

Economic Indicators

Inflation	Mar-18
Point to Point	5.68%
12 month Avg	5.78%

Call money Rates	Mar-18
Borrowing	4.4%
Lending	4.4%

Scheduled Banks Wavg Interest	Feb-18
Deposits	5.18%
Advances	9.55%
Spread	4.37%

Foreign Exchange Reserve (In mn USD)	
February'18	33,253.7
December'17	33,226.9

Commodity and Currency Rates

Currency Rates To BDT	
USD	82.98
EUR	101.98
GBP	116.22
JPY	0.77
CAD	65.04
CNH	13.21
INR	1.25

Metals (in USD)	
OIL (Per Barrel)	$73.61
GOLD (Per Ounce)	$1,335.89
Silver (per Ounce	$17.12
Copper (Per Pound)	$3.12

Foods	
Wheat (Per Bushel)	$4.58
Sugar (Per Pound)	$0.12
Coffee (Per Pound)	$0.121
Cotton (Per Pound)	$0.85

Notes: T = Turnover, M CAP=Market Capital, Δ=Change, P/E=Price Earnings Ratio, LTM P/E= Based on Last Twelve Months Earnings, Audited P/E=Based on Audited Earnings, Annualized P/E=Based on annualized earnings. P/B=Price to Book Value, RSI=Relative Strength Index, SMA = Simple Moving Average, WMA = Weighted Moving Average, MNC=Multinational Companies, Market Technical is based on analyst's judgement, NM=Not Meaningful, NA=Not Applicable.