Daily Stock Market Review

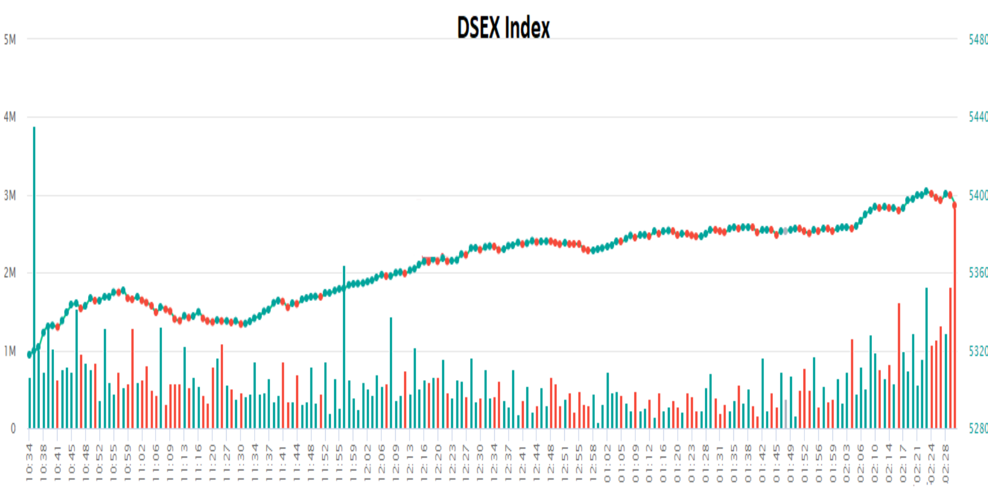
May 05, 2019 ▲ DSEX up by 108.15 points (2.05%); DSE-MCAP: USD 46.90 Billion ; Turnover: USD 63.46 Million

GREEN DELTA CAPITAL

Comment

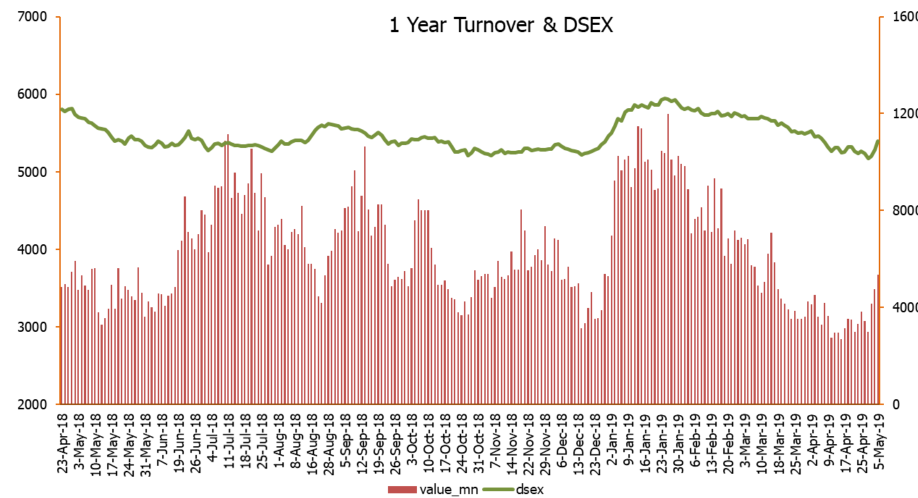
DSEX, the prime index of the Dhaka Stock Exchange (DSE), settled at 5394.90 on may 05, 2019 and finished at positive note. Between two other indexes of DSE the DS30 index, comprising blue chips, advanced 31.08 points to finish at 1901.66 and the DSES (Shariah) index closed at 15.64 points to settle at 1,240.61 at end of the trading session and showed a positive note too.

Today, there were 292 gainers, 39 losers while 16 issues were unchanged. The total market capitalization stood at BDT 3960.85 billion and total turnover reached at BDT 5359.59 million. The Banking sector had gained 2.45% today reaching 18.1% of the total market capitalization, while most of the issues lost from the sector. Similarly, NBFI sector had gained 3.49% to reach 7.4% of the total market capitalization. Bangladesh Shipping Corporation was the most traded share of the day. Familytex (BD) Limited became the top gainer with a gain of 10.00% from Textile sector. Standard Ceramic Industries Ltd became the top loser with a lose of 7.77% from Ceramic sector.



	Bourses	Indices	TCI	YCI	Δ	% Δ	YTD Δ
Market Valuation	DSE	DSEX	5394.90	5286.75	108.15	2.05%	0.17%
		DS30	1901.66	1870.58	31.08	1.66%	1.11%
		DSES	1240.61	1224.97	15.64	1.28%	0.63%
	CSE	CASPI	16503.44	16160.77	342.67	2.12%	0.33%
		CSCX	9988.40	9783.50	204.90	2.09%	0.41%
		CSE30	14582.74	14350.75	231.99	1.62%	0.57%
		CSE50	1196.82	1175.04	21.78	1.85%	-0.10%
		CSI	1084.53	1067.93	16.60	1.55%	0.72%

TCI-Today's Closing Index, YCI-Yesterdays Closing Index, YTD-Year to date



		DSE		CSE	
Market Capitalization		BDT bn	USD bn	BDT bn	USD bn
	T MCAP	3960.85	46.90	3250.50	38.49
	Y MCAP	3888.79	46.05	3177.43	37.62
	% Δ	1.85%		2.30%	

TMCAP-Today's Market Capitalization, YMCAP-Yesterday's Market Capitalization

	DSE		CSE	
Year High-Low Market Capitalization	Value	Date	Value	Date
	4215.82	29-Jan-19	3507.27	29-Jan-19
	3768.23	11-Jun-18	3082.98	11-Jun-18

		DSE		CSE	
Market Total Turnover		BDT mn	USD mn	BDT mn	USD mn
	5359.59	63.46	283.14	3.35	2.59
	4753.00	56.28	219.14	2.59	2.07
	12.76%	12.76%		29.20%	
	6241.13	6241.13		353.20	

T Turnover-Today's turnover, Y Turnover– Yesterday's Turnover

		DSE		CSE	
Advanced/ Declined		Today	Yesterday	Today	Yesterday
	Issue Gain	292	276	218	194
	Issue Loss	39	49	32	32
	Unchanged Issue	16	25	75	98

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Top 10 Traded Shares (DSE)	TCP (BDT)	YCP (BDT)	% Δ in Price	TT (BDT mn)	YT (BDT mn)	% Δ in Turnover	Total MCAP (USD mn)
BSC	51.2	48.3	6.0	198.54	32.53	510.3%	7810
NTLTUBES	126.7	121.9	3.9	176.81	70.41	151.1%	4011
FORTUNE	37.5	37.0	1.4	137.46	187.6	-26.7%	4685
MONNOCERA	238.6	227.4	4.9	119.62	115.81	3.3%	7793
UPGDCL	320.2	307.7	4.1	118.51	272.78	-56.6%	153404
BSCCL	152.8	154.2	-0.9	109.71	63.85	71.8%	25198
NPOLYMAR	106.2	105.8	0.4	108.33	91.42	18.5%	3177
ACTIVEFINE	28.9	28.8	0.4	102.42	88.65	15.5%	6934
LEGACYFOOT	137.3	124.9	9.9	82.26	35.1	134.4%	1796
BBSCABLES	97.9	96.9	1.0	71.92	56.34	27.7%	15537

TCP– Today's close price, YCP-Yesterday's close price, TT-Today's Turnover, YT– Yesterday's Turnover, Total MCAP-Total Market capitalization

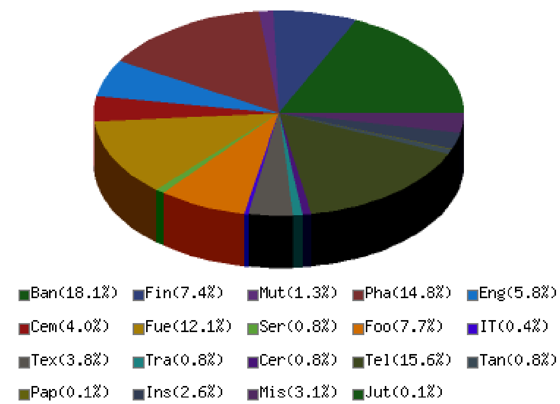
Top 10 Gainers (DSE)	TCP (BDT)	YCP (BDT)	% Δ in Price	TT (BDT mn)	YT (BDT mn)	% Δ in Turnover	Total MCAP (USD mn)
FAMILYTEX	4.4	4.0	10.00	8.44	4.37	93.1%	1558
QUASEMIND	36.5	33.2	9.94	11.62	4.46	160.5%	2148
LEGACYFOOT	137.3	124.9	9.93	82.26	35.1	134.4%	1796
OAL	11.1	10.1	9.90	14.97	7.17	108.8%	1882
EASTERNINS	49.0	44.6	9.87	28.29	13.99	102.2%	2112
GENNEXT	5.6	5.1	9.80	9.54	9.12	4.6%	2772
FASFIN	9.0	8.2	9.76	24.2	9.28	160.8%	1278
ZAHINTEX	9.0	8.2	9.76	1.85	1	85.0%	736
PROVATIINS	29.3	26.7	9.74	10.78	12.42	-13.2%	870
BXSYNTH	6.8	6.2	9.68	0.86	0.66	30.3%	590

TCP– Today's close price, YCP-Yesterday's close price, TT-Today's Turnover, YT– Yesterday's Turnover, Total MCAP-Total Market capitalization

Top 10 Losers (DSE)	TCP (BDT)	YCP (BDT)	% Δ in Price	TT (BDT mn)	YT (BDT mn)	% Δ in Turnover	Total MCAP (USD mn)
STANCERAM	259.80	281.70	-7.77	27.91	36.98	-0.25	1678.48
SAMATALETH	73.80	79.30	-6.94	4.18	2.42	0.73	761.62
BIFC	5.00	5.20	-3.85	0.03	0.01	2.00	503.40
IBBLPBOND	921.00	956.50	-3.71	0.86	1.14	-0.25	2763.00
BEACHHATCH	20.90	21.70	-3.69	2.11	3.62	-0.42	865.28
PROGRESLIF	85.60	88.80	-3.60	0.06	0.00	-	1101.31
GENEXIL	46.50	48.00	-3.12	103.97	76.80	0.35	3794.40
SONARGAON	36.80	37.90	-2.90	3.43	2.07	0.66	973.99
POPULAR1MF	4.30	4.40	-2.27	7.93	0.05	157.60	1070.13
VFSTDL	50.30	51.40	-2.14	11.96	12.01	0.00	4687.27

TCP– Today's close price, YCP-Yesterday's close price, TT-Today's Turnover, YT– Yesterday's Turnover, Total MCAP-Total Market capitalization

Sector Wise Market Capitalization (DSE)



Sector Valuation (DSE)	T MCAP (BDT in mn)	% Δ of MCAP	T Turnover (BDT in mn)	% Δ Turno-ver	PE	Div. Yield
Banking Sector	594803	2.45%	483.00	31.6%	8.69	5.0%
Financial Institution	184137	3.49%	180.00	97.8%	21.40	3.6%
Mutual Funds	32055	1.44%	37.00	236.4%	--	7.7%
Pharmaceuticals	519496	0.65%	568.00	-7.9%	18.10	1.9%
Engineering	194868	2.62%	896.00	21.7%	16.61	1.8%
Cement	93204	0.66%	76.00	18.8%	31.34	2.3%
Fuel & Power	451930	2.17%	470.00	-12.8%	12.35	4.3%
Service & Real Est.	18220	2.75%	29.00	3.6%	17.71	3.8%
Food & Allied	335581	4.29%	225.00	12.5%	12.31	3.1%
IT	20813	1.48%	222.00	5.2%	21.28	2.2%
Textile	139445	1.99%	671.00	18.8%	16.59	3.1%
Travel & Leisure	20577	1.60%	32.00	52.4%	24.63	3.9%
Ceramic	27711	1.97%	163.00	0.0%	21.96	2.7%
Telecomm.	514681	1.10%	132.00	-16.5%	14.20	7.4%
Tannery	25483	0.78%	257.00	5.3%	32.92	3.0%
Paper & Printing	14206	3.88%	42.00	7.7%	39.81	2.7%
Insurance	101820	3.41%	255.00	40.9%	27.95	2.8%
Miscellaneous	122551	4.49%	432.00	86.2%	28.57	1.5%
Jute	4114	4.81%	13.00	30.0%	76.31	0.2%
Total	**3960847**	-	-	-	**13.97**	-

TMCAP-Today's Market Capitalization Turnover-Today's Turnover, PE-Price Earnings Ratio

	S&P 500	FTSE 100	NIKKEI 225	HANG SENG	BSE
World market	2,945.64	7380.64	22258.73	3411.34	11733.94

	USD	AUD	GBP	EURO
Exchange Rates (BDT)	84.45	59.32	111.27	94.62

Macro News

Remittance inflow rises 10pc in Jul-Apr period

The flow of inward remittances grew by 10.01 per cent in the first 10 months of this fiscal year (FY) as the exchange rate of local currency maintained a depreciating mode against the US dollar. The Bangladeshi nationals working abroad sent home US$ 13.03 billion during the July-April period of the FY 2018-19 from $12.09 billion in the same period of the previous FY, according to the central bank's latest statistics. The remittance inflow registered $ 1.43 billion in April, 2019 down from $ 1.46 billion in the previous month. It was $ 1.33 billion in April 2018. "We expect the inflow of remittance to touch $1.50 billion by the end of this month, ahead of the Eid-ul-Fitr festival," a senior official of the Bangladesh Bank (BB) told.

Public debt on the rise

The government debt went on rising in the year 2018 mainly due to an increased sale of the national savings certificates (NSCs). The debt rose to 32.5 per cent of the gross domestic product (GDP) in December 2018, up by 2.1 percentage point from a year earlier, according to estimates of the Institute of International Finance (IIF). The IIF is a group of 38 banks of industrialised states, formed in 1983 to address international debt crisis in the early 1980s. According to the estimates obtained, the non-financial corporate debt rose by 2.0 percentage points to 47.3 per cent of the GDP during the period under review. The corporate debt comprising both short and long term is now around $21 billion only from overseas sources, according to the Bangladesh Bank. The IIF also said the debt of the financial institutions increased to 2.1 per cent of the GDP, up by 0.4 percentage point from 2017.

Sector News

Financial Institutions

IPDC

The Company has informed that it has credited the Bonus shares for the year ended on December 31, 2018 to the respective shareholders' BO Accounts. Cash dividend and sale proceeds of fractional stock dividend to the respective shareholders' Bank Accounts have been distributed through BEFTN system.

Insurance

BGIC

(Q1 Un-audited): EPS was Tk. 0.73 for January-March 2019 as against Tk. 0.90 for January-March 2018. NOCFPS was Tk. 1.43 for January-March 2019 as against Tk. 1.14 for January-March 2018. NAV per share was Tk. 20.40 as on March 31, 2019 and Tk. 20.50 as on March 31, 2018.

Bank

ALARABANK

As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on May 12, 2019 at 2:10 PM to consider, among others, un-audited financial statements of the Company for the First Quarter (Q1) period ended on March 31, 2019.

Food and Allied

BANGAS

(Q3 Un-audited): EPS was Tk. 1.03 for January-March 2019 as against Tk. 0.54 for January-March 2018; EPS was Tk. 3.26 for July 2018-March 2019 as against Tk. 0.36 for July 2017-March 2018. NOCFPS was Tk. (0.65) for July 2018-March 2019 as against Tk. 0.62 for July 2017-March 2018. NAV per share was Tk. 23.32 as on March 31, 2019 and Tk. 20.06 as on June 30, 2018.