Daily Stock Market Review

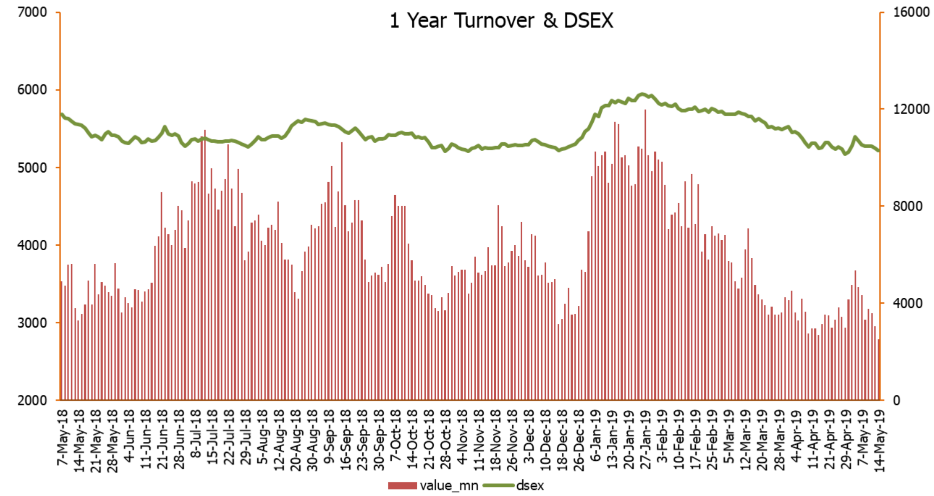
May 14, 2019 ▼ DSEX down by 29.91 Points (-0.57%); DSE-MCAP: USD 45.51 Billion ; Turnover: USD 29.75 Million

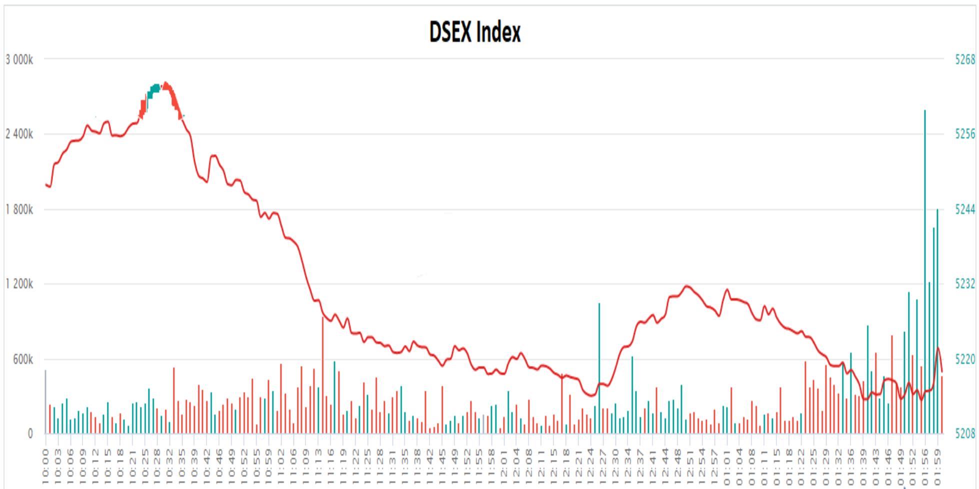
GREEN DELTA CAPITAL

Comment

DSEX, the prime index of the Dhaka Stock Exchange (DSE), settled at 5217.91 on May 14, 2019 and finished at negative note. Between two other indexes of DSE the DS30 index, comprising blue chips, declined 10.88 points to finish at 1825.52 and the DSES (Shariah) index closed at 7.00 points to settle at 1,203.37 at end of the trading session and showed a negative note too.

Today, there were 77 gainers, 219 losers while 52 issues were unchanged. The total market capitalization stood at BDT 3845.95 billion and total turnover reached at BDT 2513.65 million, which was 13 months lower. The Banking sector had lost 0.53% today reaching 18.1% of the total market capitalization, while most of the issues lost from the sector. Similarly, NBFI sector had lost 0.79% to reach 7.4% of the total market capitalization. Fortune Shoes Limited was the most traded share of the day. ICB AMCL Sonali Bank Limited 1st Mutual Fund became the top gainer with a gain of 7.46% from Mutual Fund sector. R.N. Spinning Mills Limited became the top loser with a lose of 6.06 % from Textile sector.





	Bourses	Indices	TCI	YCI	Δ	% Δ	YTD Δ
Market Valuation	DSE	DSEX	5217.91	5247.83	-29.91	-0.57%	-3.11%
		DS30	1825.52	1836.40	-10.88	-0.59%	-2.94%
		DSES	1203.37	1210.37	-7.00	-0.58%	-2.39%
	CSE	CASPI	15962.29	16055.36	-93.07	-0.58%	-2.96%
		CSCX	9665.02	9721.45	-56.43	-0.58%	-2.84%
		CSE30	14098.03	14177.31	-79.28	-0.56%	-2.78%
		CSE50	1159.13	1165.72	-6.60	-0.57%	-3.25%
		CSI	1052.94	1058.58	-5.64	-0.53%	-2.21%

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	3845.95	45.51	3139.75	37.16
	Y MCAP	3864.53	45.73	3157.26	37.36
	% Δ	-0.48%		-0.55%	

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
	T Turnover	2513.65	29.75	145.49	1.72
	Y Turnover	3050.32	36.10	158.47	1.88
	% Δ	-17.59%		-8.19%	
	Avg (Year)	6196.89		343.11	

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

		DSE		CSE	
Advanced/ Declined		Today	Yesterday	Today	Yesterday
	Issue Gain	77	87	52	54
	Issue Loss	219	212	142	147
	Unchanged Issue	52	45	130	123

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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)
FORTUNE	36.9	37.3	-1.1	152.3	96.27	58.2%	4610
JAMUNABANK	19.0	19.0	0.0	86.63	66.13	31.0%	14235
BRACBANK	57.4	58.8	-2.4	85.4	51.88	64.6%	70796
BSC	50.0	51.3	-2.5	70.87	58.54	21.1%	7627
MONNOCERA	232.1	235.6	-1.5	62.65	61.7	1.5%	7581
POWERGRID	64.1	65.1	-1.5	59.04	73.62	-19.8%	29545
GP	346.6	348.1	-0.4	56.06	68.46	-18.1%	468014
LEGACYFOOT	134.5	126.1	6.7	55.76	30.8	81.0%	1759
SQURPHARMA	254.2	255.0	-0.3	49.83	70.26	-29.1%	200566
BSCCL	137.6	139.8	-1.6	41.45	34.94	18.6%	22691

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

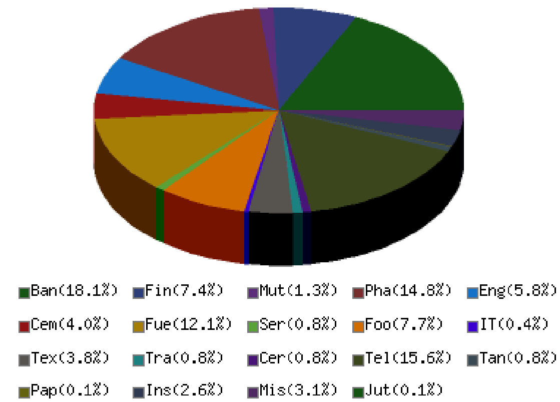
Top 10 Gainers (DSE)	TCP (BDT)	YCP (BDT)	% Δ in Price	TT (BDT mn)	YT (BDT mn)	% Δ in Turnover	Total MCAP (USD mn)
ICBSONALI1	7.2	0.0	7.46	0.25	0	-	720
IBBLPBOND	974.5	907.5	7.38	2.25	0.92	144.6%	2924
LEGACYFOOT	134.5	126.1	6.66	55.76	30.8	81.0%	1759
BANGAS	251.7	241.0	4.44	7.74	4.84	59.9%	1828
POPULARLIF	88.6	84.9	4.36	1.23	1.76	-30.1%	5354
STANCERAM	257.4	247.5	4.00	13.8	17.05	-19.1%	1663
EXIM1STMF	5.2	5.0	4.00	0	0.36	-100.0%	614
MEGHNAPET	14.1	13.6	3.68	0.14	0.14	0.0%	169
RAHIMTEXT	407.2	393.0	3.61	1.61	0.94	71.3%	3502
STANDARINS	34.6	33.4	3.59	11.5	4.83	138.1%	1362

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)
RNSPIN	6.20	6.60	-6.06	12.27	24.66	-0.50	2433.78
ARAMITCEM	19.40	20.60	-5.83	0.27	0.06	3.50	657.27
VAMLRBBF	6.60	7.00	-5.71	0.10	0.00	-	1047.72
FAMILYTEX	4.10	4.30	-4.65	8.53	4.74	0.80	1452.06
NLI1STMF	12.30	0.00	-4.65	0.03	0.00	-	619.11
NAVANACNG	44.00	46.00	-4.35	12.57	3.01	3.18	3015.26
CAPMBDBLMF	6.70	0.00	-4.29	0.02	0.00	-	335.88
RELIANCINS	44.00	45.90	-4.14	4.69	2.36	0.99	4627.09
ZEALBANGLA	37.40	39.00	-4.10	0.01	0.00	-	224.40
APOLOISPAT	7.20	7.50	-4.00	8.52	5.26	0.62	2889.42

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 Turnover	PE	Div. Yield
Banking Sector	575854	-0.53%	439.00	-9.5%	9.40	5.2%
Financial Institution	175071	-0.79%	60.00	27.7%	19.11	3.7%
Mutual Funds	31388	-0.20%	32.00	33.3%	--	7.8%
Pharmaceuticals	505196	-0.43%	210.00	-27.8%	17.63	2.0%
Engineering	188654	-0.72%	295.00	-27.7%	16.40	1.9%
Cement	91493	-1.15%	33.00	-57.1%	27.74	2.3%
Fuel & Power	446426	-0.31%	194.00	-45.5%	12.20	4.4%
Service & Real Est.	17571	-0.71%	9.00	-50.0%	17.08	4.0%
Food & Allied	316265	-0.83%	66.00	-25.8%	11.60	3.3%
IT	20312	-0.48%	89.00	-28.2%	20.77	2.3%
Textile	134878	-0.60%	244.00	-28.0%	16.12	3.3%
Travel & Leisure	19612	-2.12%	11.00	-15.4%	23.47	4.1%
Ceramic	26841	-0.97%	85.00	-4.5%	21.40	2.8%
Telecomm.	490705	-0.48%	98.00	-4.9%	13.54	7.7%
Tannery	25100	-0.25%	213.00	62.6%	32.43	3.1%
Paper & Printing	13812	-0.70%	7.00	-36.4%	38.70	2.8%
Insurance	98307	-0.52%	90.00	-20.4%	27.17	2.9%
Miscellaneous	118854	-0.75%	179.00	10.5%	27.71	1.6%
Jute	3804	0.18%	2.00	-60.0%	70.57	0.2%
Total	**3845951**	-	-	-	**13.88**	-

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	2,834.41	7241.60	21093.43	28308.26	11355.29

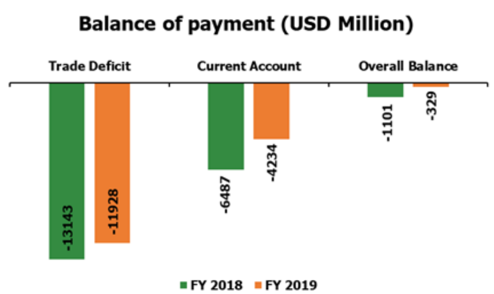
	USD	AUD	GBP	EURO
Exchange Rates (BDT)	84.50	58.68	109.51	94.85

Macro News

Poverty rate in Bangladesh drops to 21.8pc

The country's poverty rate came down at 21.8 per cent in 2018, according to the latest data of the Bangladesh Bureau of Statistics (BBS). Meanwhile the poverty rate, as per the lower poverty line or people living in extreme poverty, came down at 11.3 per cent in last year. The findings were revealed at a press conference at the BBS Bhaban on May 13, 2019. The press conference was arranged to reveal the final data of the Household Income and Expenditure Survey (HIES)-2016, reports BSS. According to the growth elasticity model, the poverty rate as per upper poverty line was 21.8 per cent while the poverty rate as per lower poverty line was 11.3 per cent in 2018.

Trade deficit narrows 9pc



Trade deficit fell 9.24 percent year-on-year to $11.92 billion in the first nine months of the current fiscal year (2018-19), giving some breathing space to the government in managing the economy. A steady growth of exports against a slowdown in imports narrowed the trade gap between July and March, 2019. "This indication is good for the economy," said executive director of the Policy Research Institute of Bangladesh. "But we are still in a bad state of affairs in terms of earnings from exports and the volume of foreign exchange reserve." Exports are on the rise but yet to enter an impressive zone. Merchandise exports fetched $30.43 billion in the nine months, up 12.09 percent year-on-year. Imports rose 5.13 percent to $42.36 billion, according to data from the central bank.

Sector News

Textile

ACFL

(Q3 Un-audited): EPS was Tk. 0.48 for January-March 2019 as against Tk. 0.62 for January-March 2018; EPS was Tk. 1.94 for July 2018-March 2019 as against Tk. 1.97 for July 2017-March 2018. NOCFPS was Tk. 0.50 for July 2018-March 2019 as against Tk. 0.94 for July 2017-March 2018. NAV per share was Tk. 43.42 as on March 31, 2019 and Tk. 42.33 as on June 30, 2018.

Bank

RUPALIBANK

(Q1 Un-audited): Consolidated EPS was Tk. 0.25 for January-March 2019 as against Tk. 0.22 for January-March 2018. Consolidated NOCFPS was Tk. (79.51) for January -March 2019 as against Tk. (32.11) for January-March 2018. Consolidated NAV per share was Tk. 46.00 as on March 31, 2019 and Tk. 45.73 as on December 31, 2018.

MERCANBANK

Consolidated EPS was Tk. 0.63 for January-March 2019 as against Tk. 0.81 for January-March 2018. Consolidated NOCFPS was Tk. 1.96 for January-March 2019 as against Tk. 2.31 for January-March 2018. Consolidated NAV per share was Tk. 23.54 as on March 31, 2019 and Tk. 22.91 as on December 31, 2018.

MTB

Consolidated EPS was Tk. 0.73 for January-March 2019 as against Tk. 0.65 for January-March 2018. Consolidated NOCFPS was Tk. (8.65) for January-March 2019 as against Tk. (13.57) for January-March 2018. Consolidated NAV per share was Tk. 23.88 as on March 31, 2019 and Tk. 23.16 as on December 31, 2018.

Engineering

SINGERBD

Consolidated EPS was Tk. 1.60 for January-March 2019 as against Tk. 1.56 for January-March 2018. Consolidated NOCFPS was Tk. (12.40) for January-March 2019 as against Tk. (8.54) for January-March 2018. Consolidated NAV per share was Tk. 27.01 as on March 31, 2019 and Tk. 30.13 as on December 31, 2018.