



AT CAPITAL DAILY MARKET UPDATE – October 05, 2016

Overview

The DSEX closed at 4,714.1 points, up by 5.3 points. The total transaction was worth BDT 5.3 bn.

Price of 148 issues appreciated whereas 111 issues declined and 63 others remained unchanged.

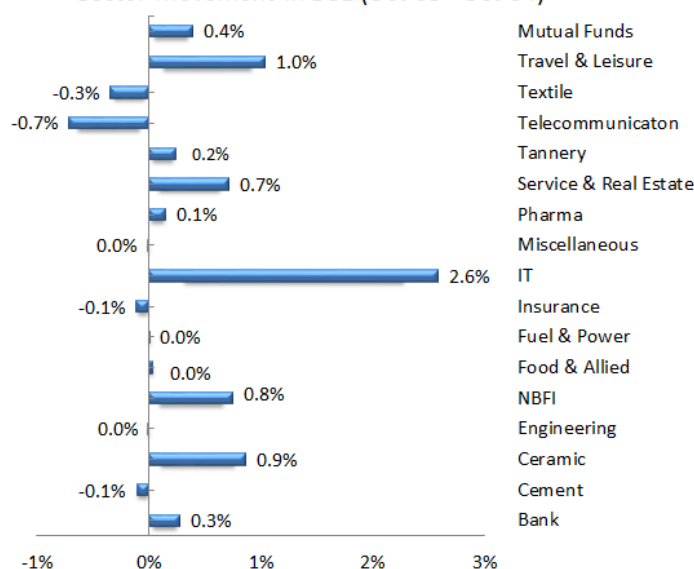
TOP 10 GAINERS			TOP 10 LOSERS		
TRADING CODE	CLOSEP	%CHANGE	TRADING CODE	CLOSEP	%CHANGE
STANCERAM	54.8	+9.4%	STANDARINS	9.0	(5.3%)
INTECH	14.6	+8.1%	FINEFOODS	11.0	(5.2%)
GEMINISEA	813.4	+6.8%	BEACHHATCH	13.8	(4.2%)
RENWICKJA	755.3	+5.1%	SHYAMPSUG	25.5	(4.1%)
PREMIERLEA	10.7	+4.9%	PRAGATIINS	20.1	(3.8%)
MONNOCERA	39.9	+4.7%	ETL	11.2	(3.4%)
AGNISYSL	19.7	+4.2%	FEDERALINS	16.1	(3.0%)
BDAUTOCA	45.1	+3.9%	ASIAPACINS	159.5	(2.9%)
YPL	35	+3.9%	APEXFOODS	13.7	(2.8%)
PREMIERBAN	8.2	+3.8%	PROVATIINS	28.3	(4.4%)

Index Movements:

INDEX	VALUE	DAY CH(%)	MTD(%)	YTD(%)
DSEX	4,714.1	+0.1%	+0.4%	+1.8%
DSES	1,130.1	+0.1%	+0.4%	+2.1%
DS30	1,783.9	(0.1%)	+0.3%	+1.9%

MARKET STAT		TODAY	LAST DAY	CHANGE(%)
MARKET CAP (Equity)	BDT MM	2,703,419.6	2,702,808.8	+0.0%
	USD MM	34,482.4	34,474.6	+0.0%
TURNOVER	BDT MM	5,267.9	5,623.3	(6.3%)
	USD MM	67.2	71.7	(6.3%)
VOLUME	MILLION SHARES	173.5	185.3	(6.4%)

Sector Movement in DSE (Oct 05 - Oct 04)



Market Commentary:

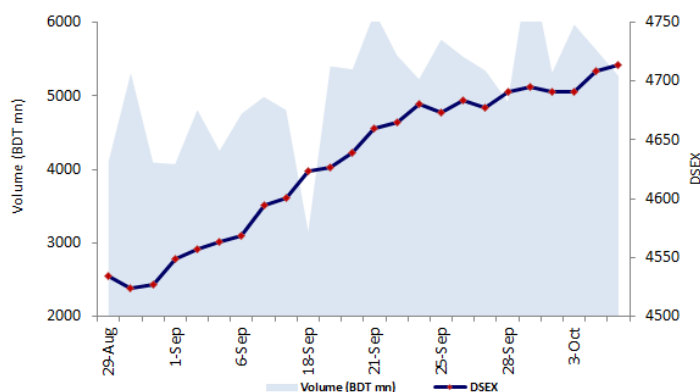
Market continued its bullish spell posting meager gain with some profit taking trading. Session promptly advanced to the upper level in the morning followed by a downtrend which retraced somewhat in the closing hour and ended the index meagerly higher by 5.3 points at 4,714.1 points. Gainers outnumbered Losers by 148 to 111; whereas 63 issues remained unchanged.

Turnover decreased slightly by 6.3 % to 5.3bn, crossing the 5.0bn mark for the fifth consecutive sessions. Turnover concentrated mainly on both Textile and Engineering followed by Fuel & Power, Pharma and Bank sectors.

NBFI sector performed relatively well today. Among the other prominent sectors Bank and Tannery outperformed the market while the rest underperformed.

SINGERBD was the daily turnover leader for the third consecutive day today; contributing 4.6% to the total turnover and also posted 0.8% price return.

Last 1 Month DSEX





News:

Inflation creeps up in Sep

Inflation increased 16 basis points to 5.3 percent last month, mainly because of price rise in food items, especially of staple rice. Food inflation rose 80 basis points to 5.1 percent in September, according to Bangladesh Bureau of Statistics. The price of per kilogram coarse rice jumped 16 percent during the last one year, according to Trading Corporation of Bangladesh.

However, non-food inflation declined 81 basis points to 6.19 percent, the BBS data showed.

A planning ministry official said people spent much on food items last month, especially for Eid-ul-Azha, when around 55-57 lakh cattle were sacrificed.

The government has targeted to keep the inflation rate within 5.8 percent this fiscal year, and the last month's data showed that it was still below the government target.

In its latest monetary policy, the central bank also aimed at keeping the inflation rate within the budgetary target, and the recent trend showed that it is in a safe zone.

Although there was pressure on the Bangladesh Bank to relax the monetary policy for increasing investment, it took a balanced policy by bumping up the private sector credit growth and keeping the policy rates unchanged.

<http://www.thedailystar.net/business/inflation-creeps-sep-1294198>

WTO: Global apparel consumption falls

Global consumption of apparel products has slipped by 7.92% in 2015 to \$445 billion since 2008 economic recession. The developed countries witnessed the consumption fall in the wake of gloomy economic situation. According to World Trade Organisation (WTO) data, global consumption of RMG products came down to \$445 billion, which was \$483.28 billion in previous year.

After the economic recession in 2008, the global consumption of clothing products witnessed a decline by 13.23% to \$315.51 billion in 2009, which was \$363.62 billion a year ago.

The slower consumption of apparel products comes as a challenge to leading RMG exporting countries as they have already seen negative growth except Bangladesh.

China, the number one exporter accounting for 39.26% global market share, has seen a 6.37% decline in its exports to world market in 2015 followed by Turkey and Indonesia.

According to the World Trade Statistical Review 2016 released in August by WTO, Bangladesh global market share in clothing products rose to 5.9% to \$26.15 billion in 2015, which was 5.1% in the previous year.

However, Bangladesh apparel export in the last fiscal year was \$28 billion.

<http://www.dhakatribune.com/business/2016/10/05/wto-global-apparel-consumption-falls/>

Tamim Chowdhury featured in new IS publication

Rumiyah describes Tamim as the former head of military and covert operations of the Soldiers of Khilafah in Bengal. A new Islamic State publication has featured an article on the July 1 Gulshan cafe attack ostensibly written by Tamim Ahmed Chowdhury, who was killed during a police operation in Narayanganj on August 27.

<http://www.dhakatribune.com/bangladesh/crime/2016/10/05/tamim-chowdhury-featured-new-publication/>