



# AT CAPITAL DAILY MARKET UPDATE – August 21, 2016

## Overview

The DSEX closed at 4,579.0 points, down by 6.0 points. The total transaction was worth BDT 4.7 bn.

Price of 83 issues appreciated whereas 168 issues declined and 70 others remained unchanged.

## Index Movements:

| INDEX | VALUE   | DAY CH(%) | MTD(%) | YTD(%) |
|-------|---------|-----------|--------|--------|
| DSEX  | 4,579.0 | (0.1%)    | +1.2%  | (1.1%) |
| DSES  | 1,119.0 | (0.2%)    | +0.9%  | +1.1%  |
| DS30  | 1,766.3 | +0.0%     | (0.2%) | +0.9%  |

| MARKET STAT         |                | TODAY       | LAST DAY    | CHANGE(%) |
|---------------------|----------------|-------------|-------------|-----------|
| MARKET CAP (Equity) | BDT MM         | 2,638,828.6 | 2,642,933.8 | (0.2%)    |
|                     | USD MM         | 33,658.5    | 33,710.9    | (0.2%)    |
| TURNOVER            | BDT MM         | 4,707.0     | 5,119.0     | (8.0%)    |
|                     | USD MM         | 60.0        | 65.3        | (8.0%)    |
| VOLUME              | MILLION SHARES | 109.6       | 128.5       | (14.7%)   |

## Market Commentary:

Market fell on the opening session of the week amid lackluster trading. Index got off to a positive start but quickly went into downtrend which were unable to reverse its course in the latter stage. Eventually DSEX, the broad based index dropped by 0.1%, closed at 4,579.0. Gainer to Loser ratio was almost 1:2.

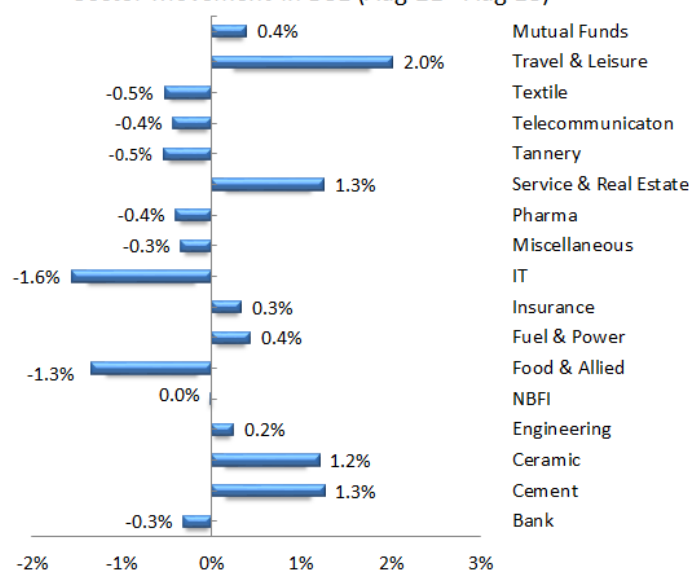
Turnover decreased by 8.0% to 4.7 bn, indicating that investors remained watchful on the upcoming earnings declarations. Turnover concentrated mainly on Engineering followed by Pharma, Fuel & power, Textile sectors.

Cement sector performed particularly well today. Among the other prominent sectors Fuel & Power, Engineering, Insurance and NBFi have outperformed the market today while the rest underperformed.

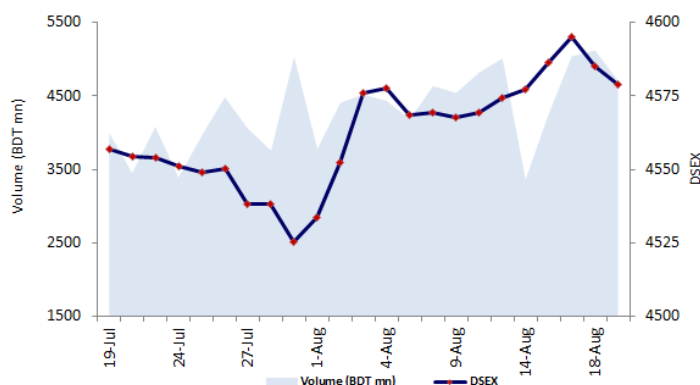
SPCL was the daily turnover leader contributing 6.0% to total turnover and also posting 3.3% price return.

| TOP 10 GAINERS |        |         | TOP 10 LOSERS |        |         |
|----------------|--------|---------|---------------|--------|---------|
| TRADING CODE   | CLOSEP | %CHANGE | TRADING CODE  | CLOSEP | %CHANGE |
| DACCADYE       | 10     | +7.5%   | SONARGAON     | 8.5    | (8.6%)  |
| NLTUBES        | 140.1  | +6.6%   | RENWICKJA     | 717.7  | (5.4%)  |
| MEGHNACEM      | 98.9   | +6.2%   | AMBEEPHA      | 481.3  | (5.4%)  |
| GQBALLPEN      | 76.6   | +5.4%   | RAHIMAFood    | 59.9   | (5.1%)  |
| ARAMITCEM      | 37.8   | +4.7%   | RAHIMTEXT     | 300.1  | (4.6%)  |
| MICEMENT       | 78.8   | +4.5%   | PHARMAID      | 281.6  | (4.3%)  |
| FEDERALINS     | 9.5    | +4.4%   | JUTESPINN     | 62.0   | (4.3%)  |
| MEGCONMILK     | 7.4    | +4.2%   | LIBRAINFU     | 770.7  | (4.2%)  |
| SAIFPOWER      | 52.9   | +3.9%   | NORTHERN      | 313.1  | (4.2%)  |
| IPDC           | 34.6   | +3.9%   | SAMATALETH    | 28.3   | (4.4%)  |

Sector Movement in DSE (Aug 21 - Aug 18)



## Last 1 Month DSEX





## News:

### BoP surplus swells

The balance of payments surplus swelled by more than 15 percent last fiscal year to \$5.04 billion thanks to lower import growth than export and an increase in foreign aid.

However, Bangladesh Bank projects the surplus will be eroded by half this fiscal year, as the investment scenario is expected to pick up. In fiscal 2015-16, exports grew 8.94 percent and imports 5.45 percent, which caused the expansion of the overall surplus, according to data from the central bank.

During the period, the trade deficit stood at \$6.27 billion in contrast to \$6.96 billion in fiscal 2014-15.

<http://www.thedailystar.net/business/bop-surplus-swells-1273156>

### Twelve private economic zones in the pipeline

Bangladesh Economic Zones Authority or Beza reviews proposals for 12 more private economic zones, a step further in creating jobs and attracting investment from both home and abroad.

If the proposals get through, Beza will provide prequalification licenses to the private companies to set up the economic zones in parts of the country.

“Local companies have expressed their intention to set up and operate private economic zones,” said Paban Chowdhury, executive chairman of Beza. But it does not mean that all of them will be allowed to develop an economic zone. “We will give prequalification licenses to only those who can meet all regulatory requirements.”

<http://www.thedailystar.net/business/twelve-private-economic-zones-the-pipeline-1272049>

### RAMPAL THERMAL PLANT: Nat'l committee prepares for a grand rally in Dhaka on Nov 26

The Dhaka Anti-plant movement could unseat govt. National Committee to Protect Oil, Gas, Mineral Resources, Power and Ports will hold a grand rally in Dhaka on November 26, if the government does not back off from executing the coal-fired Rampal power plant by November 23.

The member secretary of the national committee, Anu Muhammad, on Saturday at a concluding session of a day-long sit-in at the Central Shaheed Minar announced the next programs.

Anu Muhammad set the deadline for the government to abandon the proposed coal-based thermal power plant at Bagerhat in Rampal in three months (by November 23), because what he said the plant would eventually destroy the Sunderbans, the largest mangrove forest in the world.

<http://newagebd.net/247409/rampal-thermal-plant/>