



AT CAPITAL DAILY MARKET UPDATE – December 27, 2015

Overview

The DSEX closed at 4602.5 points, down by 5.8 points. The total transaction was worth BDT 3.3 bn.

Price of 107 issues appreciated whereas 172 issues declined and 42 others remained unchanged.

Index Movements:

INDEX	VALUE	DAY CH(%)	MTD(%)	YTD(%)
DSEX	4,602.5	(0.1%)	+0.5%	(5.4%)
DSES	1,105.1	(0.1%)	+0.2%	(3.9%)
DS30	1,747.5	+0.0%	+0.8%	(3.1%)

MARKET STAT		TODAY	LAST DAY	CHANGE
MARKET CAP (Equity)	BDT MM	2,539,825	2,545,919	(0.2%)
	USD MM	32,338	32,416	(0.2%)
TURNOVER	BDT MM	3,333.1	4,293.8	(22.4%)
	USD MM	42.4	54.7	(22.4%)
VOLUME	MILLION SHARES	81.5	97.0	(16.0%)

Market Commentary:

Market was indecisive today as institutional investors are not in full buying spring due to the year closing effect. The premier index, DSEX, started in positive trend and stayed positive for first one and half hour but later sell pressure wiped out most of the initial gain. Later in last hour index could not regain the lost points and eventually ended at 4602.5 points which is 0.12% lower than last trading session. Turnover stood at BDT 3.3bn which is 22% lower than the last trading session.

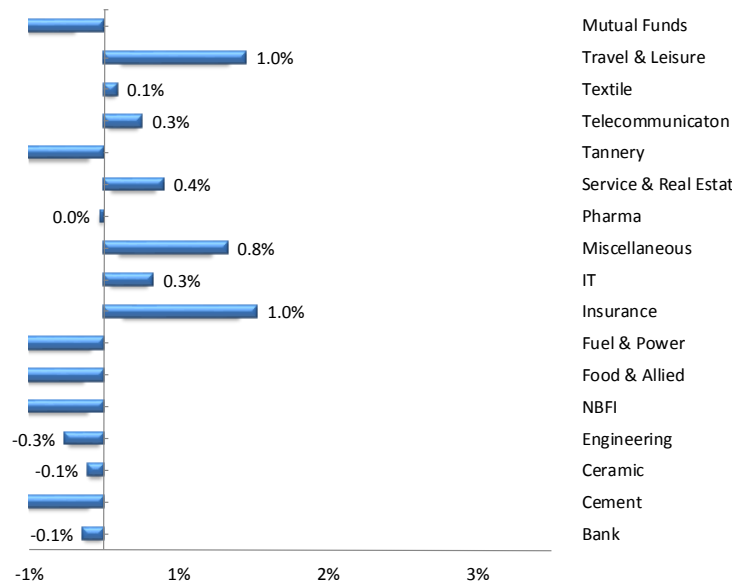
Among the prominent sectors Insurance, Telco and Miscellaneous outperformed the market while the rest underperformed.

Beximco was the daily turnover leader contributing 4.6% to the total turnover.

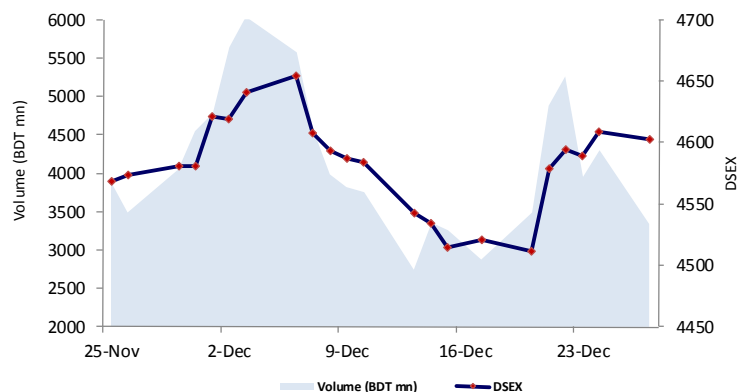
TOP 10 GAINERS			TOP 10 LOSERS	
TRADING CODE	CLOSEP	%CHANGE	RADING COD	CLOSEP
PROGRESLIF	57.4	+7.3%	LRGLOBMF1	5.6
SONARGAON	10.7	+7.0%	FBFIF	6.1
DSHGARME	179.7	+6.8%	HFL	18
FASFIN	11.3	+6.6%	ZEALBANGLA	6.3
ATLASBANG	154.5	+5.7%	APEXFOODS	120.5
MEGCONMILK	7.4	+5.7%	SHYAMPSUG	6.5
DELTALIFE	127	+5.1%	BDAUTOCA	36.3
RELIANCINS	50.7	+5.0%	GREENDELTA	53.5
NTC	617.5	+4.8%	KOHINOOR	335
EHL	35.9	+4.7%	PRAGATIINS	26.2

** Top Loser List not adjusted for Right/stock dividend post record

Sector Movement in DSE (December 27 - December 24)



Last 1 Month DSEX





News:

BB move brought cheer to stocks last week

Stocks bounced back last week on the back of the regulatory move to relax rules for banks' capital market exposure.

DSEX, the benchmark index of Dhaka Stock Exchange, rose 87.45 points, or 1.93 percent, to close the week at 4,608.32 points.

The central bank's directive relaxing banks' capital market exposure limit acted as a market catalyst, broadening the scope for investment, said IDLC Investments.

From January next year, the banks' capital given to their stockmarket subsidiaries will not be considered a portion of their exposure, Bangladesh Bank said in a notice on December 20.

<http://www.thedailystar.net/business/bb-move-brought-cheer-stocks-last-week-192940>

BB heightens watch on large loans

Bangladesh Bank is set to bump up its monitoring of loans of Tk 50 crore and above with a view to minimizing the risk of default loans of banks and financial institutions.

The move comes as an excessive debt of a large corporate group poses concerns about the health of the individual banks and financial institutions and the overall financial stability.

For that end, the BB yesterday introduced a new oversight framework named Central Database for Large Credit, which will collect, store and share credit data among the concerned banks and financial institutions.

<http://www.thedailystar.net/business/bb-heightens-watch-large-loans-192220>

Dhaka outshines its peers in hospitality market

Dhaka's average hotel occupancy has made it the region's fastest growing hospitality market, says a new study.

By virtue of limited inventory and very high demand, the Dhaka hospitality market outperforms many of its competitive peer cities in the South Asian region with an average market-wide occupancy of 69% and an annual rate of return of US\$153, according to a report titled In Focus: Bangladesh, the Dark Horse.

The report was recently published by the US-based HVS that specializes in providing services to the hospitality industry.

<http://www.dhakatribune.com/business/2015/dec/25/dhaka-outshines-its-peers-hospitality-market>