Alliance Capital Asset Management Limited

**Daily Market Review**
**7-Mar-22**

## Market Statistics

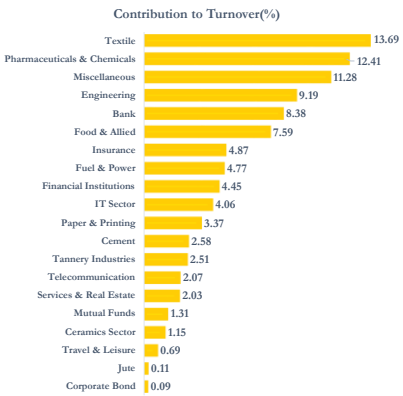
| Particulars | Today | Yesterday | Change | Δ Point | Movers & Shakers | |
|---|---|---|---|---|---|---|
| **DSEX Index** | 6,456.51 | 6,638.64 | -2.74% | -182.12 | Issues Advanced | 7 |
| DSES Index | 1,394.40 | 1,431.02 | -2.56% | -36.62 | Issues Declined | 364 |
| DS30 Index | 2,374.39 | 2,438.94 | -2.65% | -64.55 | Issues Unchanged | 8 |
| Market Cap(BDT Mn) | 5,219,345.86 | 5,331,733.81 | -2.11% | -112387.95 | Total Issue Traded | 379 |
| **Turnover (BDT Mn)** | 7402.64 | 6515.63 | 13.61% | 887.01 | | |

| Market Mover | Closing Price | YCP | Value (BDT Mn) |
|---|---|---|---|
| BEXIMCO | 147.30 | 152.20 | 412.46 |
| BSC | 107.10 | 112.00 | 300.86 |
| BATBC | 573.40 | 591.30 | 169.22 |
| ORIONPHARM | 93.20 | 97.00 | 141.22 |
| FORTUNE | 116.70 | 124.10 | 139.89 |
| LHBL | 62.00 | 66.40 | 134.16 |
| DELTALIFE | 141.20 | 149.80 | 110.48 |
| SAIFPOWER | 37.20 | 38.90 | 109.12 |
| SQURPHARMA | 212.30 | 216.90 | 106.66 |
| UNIONBANK | 11.80 | 12.00 | 104.89 |

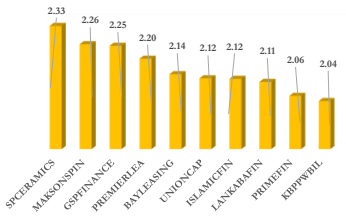
| Top Gainers | Closing Price | YCP | Change % |
|---|---|---|---|
| BDCOM | 25.90 | 23.60 | 9.75 |
| TAMIJTEX | 298.10 | 283.00 | 5.34 |
| ADNTEL | 61.10 | 58.80 | 3.91 |
| DUTCHBANGL | 74.30 | 73.10 | 1.64 |
| ROBI | 35.50 | 35.10 | 1.14 |
| PADMAOIL | 205.60 | 203.50 | 1.03 |
| 1STPRIMFMF | 17.90 | 17.80 | 0.56 |

| Top Losers | Closing Price | YCP | Change % |
|---|---|---|---|
| MEGCONMILK | 18.00 | 20.00 | -10.00 |
| ARAMITCEM | 35.00 | 38.80 | -9.79 |
| VAMLRBBF | 7.60 | 8.40 | -9.52 |
| ENVOYTEX | 38.40 | 42.40 | -9.43 |
| APEXSPINN | 147.50 | 162.40 | -9.17 |
| JUTESPINN | 130.10 | 142.50 | -8.70 |
| ASIAINS | 75.40 | 82.20 | -8.27 |
| COPPERTECH | 34.10 | 37.00 | -7.84 |
| AFCAGRO | 23.00 | 24.90 | -7.63 |
| IMAMBUTTON | 30.60 | 33.10 | -7.55 |

### Sector Performance




### Today's Market Beta (Top Ten)




### Block Transactions

| Ticker | Trade | Quantity | Val (BDT mn) |
|---|---|---|---|
| HFL | 1 | 86,000 | 1.75 |
| IBNSINA | 1 | 100,000 | 28.25 |
| MAKSONSPIN | 5 | 123,500 | 3.17 |
| PHOENIXFIN | 2 | 138,500 | 3.14 |
| ORIONPHARM | 7 | 181,500 | 18.86 |
| DSSL | 1 | 200,000 | 3.96 |
| LRGLOBMF1 | 1 | 200,000 | 1.32 |
| SONALIPAPR | 10 | 219,977 | 167.62 |
| SAIHAMCOT | 1 | 417,000 | 7.30 |
| BDCOM | 9 | 6,018,000 | 155.87 |

### Exchange Rate

(In BDT)

| Currency | Buying | Selling |
|---|---|---|
| USD | 86.00 | 86.00 |
| GBP | 113.74 | 113.77 |
| EUR | 93.96 | 93.98 |

### Today's World Stock Indices

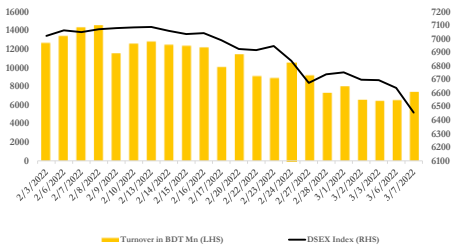
| Index | Today | Yesterday | %Change |
|---|---|---|---|
| S&P 500 | 4,306.260 | 4,373.940 | -1.55% |
| FTSE 100 | 7,379.89 | 7,445.68 | -0.88% |
| NIKKEI 225 | 26,393.03 | 26,844.72 | -1.68% |

### Sectoral P/E

| | |
|---|---|
| IT Sector | 27.81 |
| Bank | 11.62 |
| Textile | 34.87 |
| Pharmaceuticals & Chemicals | 17.79 |
| Engineering | 15.06 |
| Insurance | 21.53 |
| Miscellaneous | 14.22 |
| Food & Allied | 68.43 |
| Fuel & Power | 13.76 |
| Tannery Industries | 43.22 |
| Cement | 58.82 |
| Financial Institutions | 99.70 |
| Travel & Leisure | 309.12 |
| Paper & Printing | 52.46 |
| Telecommunication | 13.11 |
| Services & Real Estate | 23.39 |
| Ceramics Sector | 110.94 |
| Jute | -38.30 |
| Market | **17.75** |

Source: AmarStock, Stock Bangladesh and ACAML Research

### Monthly Market Movement




Source: DSE and ACAML Research

### Market Commentary

DSEX, the prime index of the Dhaka Stock Exchange (DSE) remained bearish, decreasing 2.74% to settle at 6,456.51 . The DS30 index, comprising blue chips, decreased by 64.55 points to stand at 2,374.39 and DSE Shariah lost by 36.62 points, eventually reaching 1,394.40.
Turnover, an integral metric for gauging overall market outlook, stood at BDT. 7402.64 million on DSE, increasing 13.61 % to reflect a growth in investor participation.
BEXIMCO secured the top position in the turnover list with shares worth BDT. 412.46 million changing hands, which was followed by BSC, BATBC and ORIONPHARM .
While BDCOM led the gainer's list, illustrating an increase of 9.75 per cent, MEGCONMILK was the worst performer, what with losing around 10 per cent in relation to its previous closing price.
In the sectoral font, a major portion of investor activity revolved around Textile which occupied around 13.69 % of turnover distribution and outperformed the other sectors followed by Pharmaceuticals & Chemicals and Miscellaneous .

### UPCOMING IPOs

| Name | Issue Manager | Method | IPO Size( BDT Mn) |
|---|---|---|---|
| Meghna Insurance Company Ltd | Asian Tiger Capital Partners Investments, Prime Bank Investment, and UCB Investment | Fixed Price | 160 |

### ACAML Managed Fund Details

| | |
|---|---|
| **Fund Name** | MTB Unit Fund |
| **Fund Nature** | Open Ended Fund |
| **Sponsor** | Mutual Trust Bank Limited |
| **Trustee** | Bangladesh General Insurance Co. Ltd. |
| **Custodian** | BRAC Bank |
| **NAV Per Unit** | 11.03 |
| **Sale Price** | 10.80 |
| **Repurchase Price** | 10.50 |

### ACAML Managed Fund Details

| | |
|---|---|
| **Name** | Alliance Sandhani Life Unit Fund |
| **Fund Nature** | Open Ended Fund |
| **Sponsor** | Sandhani Life Insurance Company Limited |
| **Trustee** | Bangladesh General Insurance Co. Ltd. |
| **Custodian** | BRAC Bank |
| **NAV Per Unit** | 9.70 |
| **Sale Price Per Unit** | 9.65 |
| **Repurchase Price** | 9.35 |


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