Alliance Capital Asset Management Limited

Daily Market Review

27-Sep-21

Market Statistics

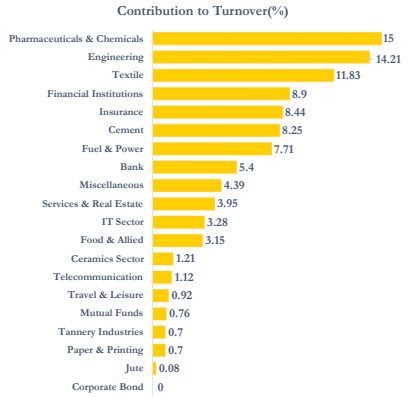
Particulars	Today	Yesterday	Change	Δ Point	Movers & Shakers	
DSEX Index	7,251.71	7,237.14	0.20%	14.57	Issues Advanced	141
DSES Index	1,578.77	1,574.59	0.27%	4.18	Issues Declined	202
DS30 Index	2,676.24	2,665.61	0.40%	10.63	Issues Unchanged	33
Market Cap(BDT Mn)	5,769,129.60	5,755,232.24	0.24%	13897.37	Total Issue Traded	376
Turnover (BDT Mn)	19,808.73	22,572.94	-12.25%	-2764.21		

Market Mover	Closing Price	YCP	Value (BDT Mn)
LHBL	82.20	80.10	1,397.26
ORIONPHARM	85.50	84.40	888.36
GPHISPAT	59.70	57.60	603.47
BEXIMCO	137.70	137.50	535.47
SAIFPOWER	39.60	37.50	499.26
SSSTEEL	26.90	26.40	453.36
BXPHARMA	238.80	237.90	397.38
PTL	71.00	69.20	381.00
SPCL	119.90	124.70	378.01
ACTIVEFINE	29.80	28.10	334.93

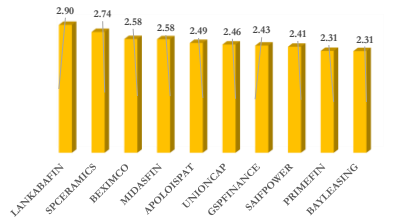
Top Gainers	Closing Price	YCP	Change %
EASTERNINS	155.30	141.20	9.99
FUWANGCER	23.70	21.80	8.72
KPPL	16.30	15.10	7.95
CENTRALPHL	19.50	18.10	7.73
MATINSPINN	64.10	59.90	7.01
PRIMEFIN	17.40	16.30	6.75
ACTIVEFINE	29.80	28.10	6.05
SAIFPOWER	39.60	37.50	5.60
WMSHIPYARD	16.00	15.30	4.58
MEGHNACEM	92.20	88.50	4.18

Top Losers	Closing Price	YCP	Change %
DSHGARME	233.60	253.40	-7.81
MEGCONMILK	20.70	22.10	-6.33
JUTESPINN	161.70	171.90	-5.93
ETL	14.10	14.80	-4.73
LIBRAINFU	932.40	973.90	-4.26
DULAMIACOT	61.00	63.70	-4.24
MONOSPOOL	175.70	183.20	-4.09
MITHUNKNIT	19.60	20.40	-3.92
SPCL	119.90	124.70	-3.85
NORTHERN	340.40	353.60	-3.73

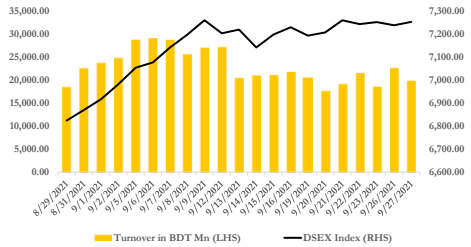
Sector Performance



Today's Market Beta (Top Ten)



Monthly Market Movement



Source: DSE and ACAML Research

Market Commentary

DSEX, the prime index of the Dhaka Stock Exchange (DSE) showed an upward trend rising 0.20% to settle at 7,251.71 following a modest correction in the previous session. The DS30 index, comprising blue chips, slipped by 10.63 points to stand at 2,676.24 and DSE Shariah index gained 4.18 points, eventually reaching 1,578.77. Investors taking positions in sector wise large cap issues caused the indices to return to the positive zone.

Turnover, an integral metric for gauging overall market outlook, stood at BDT. 19,808.73 million on DSE, falling by 12.25% to reflect a fall in investor participation.

LHBL stood at the top position in the turnover list with shares worth BDT. 1,397.26 million changing hands, which was followed by ORIONPHARM, GPHISPAT and BEXIMCO.

While EASTERNINS led the gainer's list, illustrating an increase of 9.99 per cent, DSHGARME was the worst performer, what with losing around 7.81 per cent. in relation to its previous closing price.

In the sectoral font, a major portion of investor activity revolved around the pharmaceuticals and chemicals which occupied around 15 % of turnover distribution and continued to outperform the other sectors followed by textile and engineering.

UPCOMING IPOs

Name	Issue Manager	Method	IPO Size(BDT Mn)	Offer Price
Sena Kalyan Insurance	AAA Finance & Investment	fixed-price	160	Tk 10
Union Bank	Prime Bank and BRAC EPL	fixed-price	4280	Tk 10

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	10.53
Sale Price	10.30
Repurchase Price	10.00

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	9.61
Sale Price Per Unit	9.50
Repurchase Price	9.30

Block Transactions

Ticker	Trade	Quantity	Val (BDT mn)
BXPHARMA	2	124,500	27.14
GENEXIL	3	130,500	15.99
BRACBANK	1	200,000	9.42
BNICL	2	285,000	43.03
ORIONPHARM	4	394,400	30.40
MAKSONSPIN	3	535,000	18.46
EASTERNINS	2	600,000	91.50
ICBIBANK	1	700,000	5.11
SPCL	7	936,950	107.75
PTL	16	1,126,000	77.02

Exchange Rate

(In BDT)

Currency	Buying	Selling
USD	85.35	85.35
GBP	116.78	116.81
EUR	99.98	100.01

Today's World Stock Indices

Index	Today	Yesterday	%Change
S&P 500	4,455.480	4,448.980	0.15%
FTSE 100	7,079.34	7,078.35	0.01%
NIKKEI 225	30,240.06	30,248.81	-0.03%

Sectoral P/E

IT Sector	31.82
Bank	7.75
Textile	48.96
Pharmaceuticals & Chemicals	21.19
Engineering	16.84
Insurance	22.50
Miscellaneous	35.89
Food & Allied	37.19
Fuel & Power	13.09
Tannery Industries	146.09
Cement	29.54
Financial Institutions	114.17
Travel & Leisure	366.72
Paper & Printing	50.12
Telecommunications	14.82
Services & Real Estate	33.15
Ceramics	36.29
Jute	-41.84
Market	**17.03**

Source: AmarStock, Stock Bangladesh and ACAML Research

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