Alliance Capital Asset Management Limited

Daily Market Review

18-Nov-21

Market Statistics

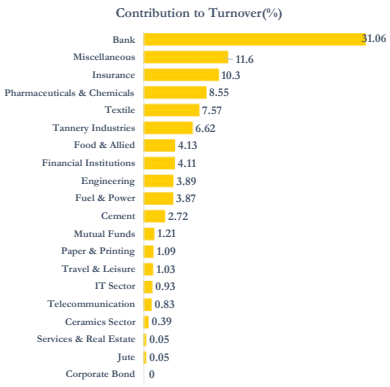
Particulars	Today	Yesterday	Change	Δ Point	Movers & Shakers	
DSEX Index	7,091.82	7,060.78	0.44%	31.04	Issues Advanced	152
DSES Index	1,480.33	1,484.15	-0.26%	-3.82	Issues Declined	159
DS30 Index	2,694.95	2,683.30	0.43%	11.65	Issues Unchanged	30
Market Cap(BDT Mn)	5,610,785.62	5,591,249.13	0.35%	19536.49	Total Issue Traded	341
Turnover (BDT Mn)	14610.362	15,070.26	-3.05%	-459.90		

Market Mover	Closing Price	YCP	Value (BDT Mn)
BEXIMCO	174.90	173.50	1,550.30
FORTUNE	109.50	111.00	938.70
DELTALIFE	232.90	221.50	892.47
IFIC	21.30	21.00	783.34
NRBCBANK	38.20	37.80	771.73
ONEBANKLTD	14.70	13.40	436.12
ORIONPHARM	107.40	106.80	415.96
LHBL	82.60	81.90	347.49
BRACBANK	58.50	57.50	309.61
MERCANBANK	19.50	18.90	305.83

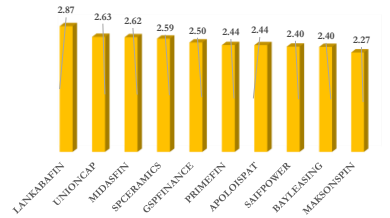
Top Gainers	Closing Price	YCP	Change %
SKICL	25.60	23.30	9.87
ONEBANKLTD	14.70	13.40	9.70
ACMEPL	16.00	14.60	9.59
AFCAGRO	32.00	29.20	9.59
REGENTTEX	11.70	10.70	9.35
PENINSULA	34.70	31.90	8.78
RAHIMAFOOD	333.30	306.50	8.74
1STPRIMFMF	24.00	22.20	8.11
STYLECRAFT	112.30	104.10	7.88
DUTCHBANGL	89.20	83.60	6.70

Top Losers	Closing Price	YCP	Change %
KTL	34.30	38.00	-9.74
MATINSPINN	63.10	67.70	-6.79
JUTESPINN	110.60	118.30	-6.51
SAIHAMCOT	16.00	17.10	-6.43
NAVANACNG	32.30	34.40	-6.10
AFTABAUTO	28.80	30.60	-5.88
ALIF	16.20	17.10	-5.26
MJLBD	91.00	95.90	-5.11
SALVOCHEM	54.70	57.60	-5.03
AIL	46.70	49.00	-4.69

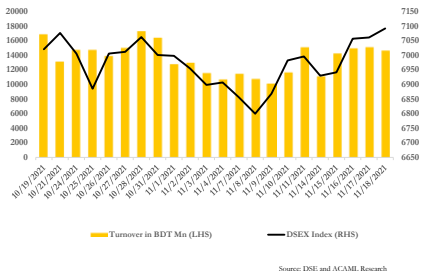
Sector Performance



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) continued to recover rising 0.44% to settle at 7,091.82 . The DS30 index, comprising blue chips, increased by 11.65 points to stand at 2,694.95 and DSE Shariah index decreased 3.82 points, eventually reaching 1,480.33 .

Turnover, an integral metric for gauging overall market outlook, stood at BDT. 14610.362 million on DSE, losing 3.05% to reflect a slowdown in investor participation. BEXIMCO secured the top position in the turnover list with shares worth BDT. 1,550.30 million changing hands, which was followed by FORTUNE, DELTALIFE and IFIC . While SKICL led the gainer's list, illustrating an increase of 9.87 per cent, KTL was the worst performer, what with losing around 9.74 per cent in relation to its previous closing price.

In the sectoral font, a major portion of investor activity revolved around Banks occupied around 31.06 % of turnover distribution and outperformed the other sectors followed by Miscellaneous and Insurance.

UPCOMING IPOs

Name	Issue Manager	Method	IPO Size(BDT Mn)
Union Bank	Prime Bank and BRAC EPL	fixed-price	4280
BD Thai Food & Beverage	BLI Capital and Unicap Investment	fixed-price	150

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	10.90
Sale Price	10.40
Repurchase Price	9.90

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	9.20

Block Transactions

Ticker	Trade	Quantity	Val (BDT mn)
KEYACOSMET	1	180,000	1.33
SHEPHERD	4	192,300	6.40
BSC	1	200,000	10.36
ONEBANKLTD	4	210,103	2.88
DELTALIFE	12	234,213	51.93
ICB	6	265,000	35.78
MAKSONSPIN	2	496,658	11.99
FORTUNE	12	675,200	73.97
NBL	4	715,000	5.93
KTL	9	863,552	34.16

Sectoral P/E

IT Sector	28.31
Bank	12.25
Textile	35.33
Pharmaceuticals & Chemicals	17.77
Engineering	14.76
Insurance	22.35
Miscellaneous	14.74
Food & Allied	66.06
Fuel & Power	13.85
Tannery Industries	50.95
Cement	61.72
Financial Institutions	194.92
Travel & Leisure	-1272.95
Paper & Printing	51.73
Telecommunication	13.14
Services & Real Estate	22.98
Ceramics Sector	95.97
Jute	-33.99
Market	**18.05**

Source: AmarStock, Stock Bangladesh and ACAML Research

Exchange Rate

(In BDT)

Currency	Buying	Selling
USD	85.80	85.80
GBP	115.66	115.69
EUR	97.12	97.13

Today's World Stock Indices

Index	Today	Yesterday	%Change
S&P 500	4,688.670	4,700.900	-0.26%
FTSE 100	7,281.30	7,321.00	-0.54%
NIKKEI 225	29,598.66	29,688.30	-0.30%

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