Alliance Capital Asset Management Limited

# Daily Market Review

**16-Nov-21**

## Market Statistics

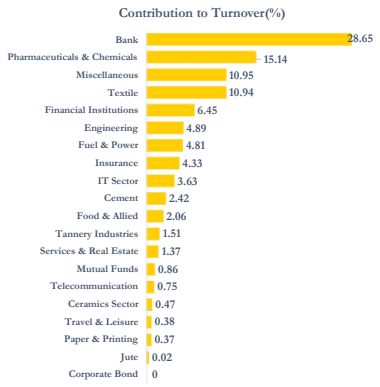
| Particulars | Today | Yesterday | Change | Δ Point | Movers & Shakers | |
|---|---|---|---|---|---|---|
| **DSEX Index** | 7,056.58 | 6,941.37 | 1.66% | 115.21 | Issues Advanced | 220 |
| DSES Index | 1,484.82 | 1,465.05 | 1.35% | 19.77 | Issues Declined | 129 |
| DS30 Index | 2,691.26 | 2,659.54 | 1.19% | 31.72 | Issues Unchanged | 27 |
| Market Cap(BDT Mn) | 5,592,663.94 | 5,531,564.99 | 1.10% | 61098.94 | Total Issue Traded | 376 |
| **Turnover (BDT Mn)** | 14918.505 | 14,213.48 | 4.96% | 705.02 | | |

| Market Mover | Closing Price | YCP | Value (BDT Mn) |
|---|---|---|---|
| BEXIMCO | 176.30 | 177.40 | 1,447.36 |
| IFIC | 21.00 | 19.50 | 1,163.11 |
| BRACBANK | 60.10 | 56.50 | 735.55 |
| SQURPHARMA | 228.20 | 222.50 | 572.94 |
| BXPHARMA | 215.90 | 215.40 | 497.24 |
| ORIONPHARM | 106.00 | 96.50 | 416.66 |
| GENEXIL | 168.40 | 161.10 | 414.16 |
| NRBCBANK | 37.50 | 37.70 | 339.95 |
| KTL | 39.50 | 39.90 | 337.49 |
| LANKABAFIN | 41.60 | 39.30 | 333.28 |

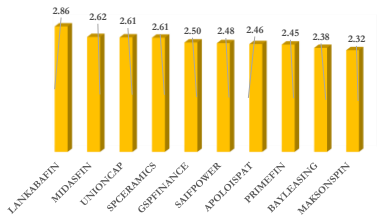
| Top Gainers | Closing Price | YCP | Change % |
|---|---|---|---|
| ABBANK | 15.50 | 14.10 | 9.93 |
| ACMEPL | 13.30 | 12.10 | 9.92 |
| ORIONPHARM | 106.00 | 96.50 | 9.84 |
| SKICL | 21.20 | 19.30 | 9.84 |
| ISLAMIBANK | 33.00 | 30.30 | 8.91 |
| ORIONINFU | 89.60 | 82.30 | 8.87 |
| ISNLTD | 36.20 | 33.60 | 7.74 |
| IFIC | 21.00 | 19.50 | 7.69 |
| DAFODILCOM | 64.90 | 60.40 | 7.45 |
| BAYLEASING | 33.90 | 31.70 | 6.94 |

| Top Losers | Closing Price | YCP | Change % |
|---|---|---|---|
| RENATA | 1315.00 | 1442.10 | -8.81 |
| MONOSPOOL | 151.80 | 164.40 | -7.66 |
| NFML | 19.60 | 20.90 | -6.22 |
| BENGALWTL | 25.60 | 27.20 | -5.88 |
| PDL | 11.50 | 12.20 | -5.74 |
| MONNOFABR | 18.60 | 19.60 | -5.10 |
| ENVOYTEX | 42.80 | 45.10 | -5.10 |
| FINEFOODS | 38.20 | 39.90 | -4.26 |
| GQBALLPEN | 108.20 | 112.90 | -4.16 |
| DESHBANDHU | 23.30 | 24.30 | -4.12 |

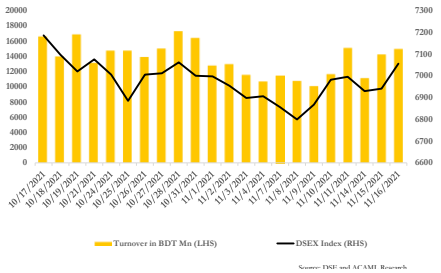
## Sector Performance




## Today's Market Beta (Top Ten)




## Monthly Market Movement




## Market Commentary

DSEX, the prime index of the Dhaka Stock Exchange (DSE) continued to recover rising 1.66% to settle at 7,056.58 . The DS30 index, comprising blue chips, increased by 31.72 points to stand at 2,691.26 and DSE Shariah index increased 19.77 points, eventually reaching 1,484.82 .

Turnover, an integral metric for gauging overall market outlook, stood at BDT. 14918.505 million on DSE, rising 4.96% to reflect a growth in investor participation. BEXIMCO secured the top position in the turnover list with shares worth BDT. 1,447.36 million changing hands, which was followed by IFIC, BRACBANK and SQURPHARMA . While ABBANK led the gainer's list, illustrating an increase of 9.93 per cent, RENATA was the worst performer, what with losing around 8.81 per cent in relation to its previous closing price.

In the sectoral font, a major portion of investor activity revolved around Banks occupied around 28.65 % of turnover distribution and outperformed the other sectors followed by Pharmaceuticalds & Chemicals and Miscalleneous.

## 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) |
|---|---|---|---|
| EHL | 1 | 100,000 | 6.00 |
| NEWLINE | 2 | 119,350 | 4.70 |
| KDSALTD | 3 | 126,200 | 8.85 |
| AL-HAJTEX | 3 | 149,500 | 9.89 |
| BXPHARMA | 1 | 200,000 | 39.32 |
| ONEBANKLTD | 1 | 200,000 | 2.80 |
| BRACBANK | 3 | 241,500 | 14.57 |
| KTL | 8 | 1,163,661 | 47.25 |
| SALVOCHEM | 13 | 1,341,250 | 86.13 |
| BDFINANCE | 3 | 1,747,000 | 114.91 |

## Exchange Rate

(In BDT)

| Currency | Buying | Selling |
|---|---|---|
| USD | 85.80 | 85.80 |
| GBP | 115.13 | 115.16 |
| EUR | 97.53 | 97.56 |

## Today's World Stock Indices

| Index | Today | Yesterday | %Change |
|---|---|---|---|
| S&P 500 | 4,682.800 | 4,682.850 | 0.00% |
| FTSE 100 | 7,344.65 | 7,347.91 | -0.04% |
| NIKKEI 225 | 29,808.12 | 29,609.97 | 0.67% |

## Sectoral P/E

| | |
|---|---|
| IT Sector | 27.49 |
| Bank | 12.07 |
| Textile | 36.70 |
| Pharmaceuticals & Chemicals | 18.36 |
| Engineering | 14.77 |
| Insurance | 22.34 |
| Miscellaneous | 14.80 |
| Food & Allied | 188.66 |
| Fuel & Power | 16.60 |
| Tannery Industries | 49.73 |
| Cement | 49.94 |
| Financial Institutions | 196.64 |
| Travel & Leisure | -1244.67 |
| Paper & Printing | 51.87 |
| Telecommunication | 13.20 |
| Services & Real Estate | 24.97 |
| Ceramics Sector | 97.03 |
| Jute | -35.17 |
| Market | **18.85** |

Source: AmarStock, Stock Bangladesh and ACAML Research


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