Alliance Capital Asset Management Limited

Daily Market Review

4-Oct-21

Market Statistics

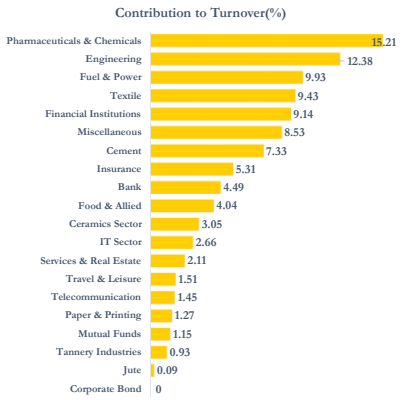
Particulars	Today	Yesterday	Change	Δ Point	Movers & Shakers	
DSEX Index	7,327.55	7,356.04	-0.39%	-28.50	Issues Advanced	48
DSES Index	1,593.75	1,593.97	-0.01%	-0.23	Issues Declined	297
DS30 Index	2,765.27	2,741.71	0.86%	23.55	Issues Unchanged	31
Market Cap(BDT Mn)	5,820,505.94	5,829,011.20	-0.15%	-8505.26	Total Issue Traded	376
Turnover (BDT Mn)	27,552.06	24,392.49	12.95%	3159.57		

Market Mover	Closing Price	YCP	Value (BDT Mn)
BEXIMCO	145.90	141.60	1,766.87
LHBL	98.10	93.10	1,741.29
ORIONPHARM	94.90	97.60	1,054.13
BXPHARMA	250.80	245.70	764.68
LANKABAFIN	45.50	47.10	720.84
BATBC	685.60	669.60	714.64
IFADAUTOS	60.30	58.90	532.39
GPHISPAT	63.30	62.70	524.91
SPCERAMICS	39.10	35.70	478.47
POWERGRID	63.10	65.00	453.65

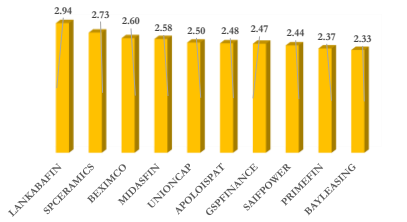
Top Gainers	Closing Price	YCP	Change %
ORIONINFU	98.40	89.60	9.82
SPCERAMICS	39.10	35.70	9.52
SEAPEARL	52.20	48.50	7.63
LHBL	98.10	93.10	5.37
SONALIPAPR	518.10	493.60	4.96
ACTIVEFINE	31.20	29.90	4.35
AIL	63.80	61.20	4.25
BEACONPHAR	221.80	213.10	4.08
ADVENT	29.80	28.90	3.11
ICB	162.80	157.90	3.10

Top Losers	Closing Price	YCP	Change %
SHURWID	20.60	22.80	-9.65
ICBIBANK	6.00	6.60	-9.09
MITHUNKNIT	16.70	18.10	-7.73
GBBPOWER	42.10	45.60	-7.68
DSSL	22.50	24.20	-7.02
ALLTEX	16.60	17.80	-6.74
SUNLIFEINS	35.90	38.40	-6.51
MIDASFIN	23.20	24.80	-6.45
METROSPIN	28.20	30.10	-6.31
REGENTTEX	13.40	14.30	-6.29

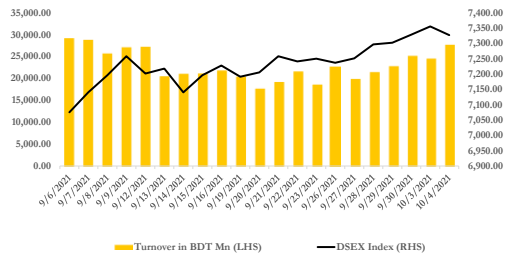
Sector Performance



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) broke its continued bullish run, declining 0.39 % to settle at 7,327.55. The DS30 index, comprising blue chips, gained by 23.55 points to stand at 2,765.27 and DSE Shariah index fell 1.23 points, eventually reaching 1,593.75. Aggressive profit booking resulting from stocks that gained in the previous sessions attributed to the decline of the DSEX.

Turnover, an integral metric for gauging overall market outlook, stood at BDT. 27,552.06 million on DSE, rising 12.95% to reflect active investor participation.

BEXIMCO returned to its the top position in the turnover list with shares worth BDT1,766.87 million changing hands, which was followed by LHBL, ORIONPHARM and BXPHARMA.

While ORIONINFU led the gainer's list, illustrating an increase of 9.82 per cent, EASTERNINS was the worst performer, what with losing around 9.65 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 15.21 % of turnover distribution and outperformed the other sectors followed by Engineering and Fuel & Power.

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	10.66
Sale Price	10.45
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	9.76
Sale Price Per Unit	9.60
Repurchase Price	9.30

Block Transactions

Ticker	Trade	Quantity	Val (BDT mn)
SPCL	7	155,633	19.68
PTL	5	184,900	13.30
GENEXIL	5	210,550	27.44
FORTUNE	4	316,000	26.47
PREMIERCEM	4	328,500	29.73
BRACBANK	1	365,983	17.42
ICBAMCL2ND	2	500,000	6.95
CENTRALINS	2	646,000	38.11
MBL1STMF	5	963,893	8.00
PHOENIXFIN	2	2,020,000	71.70

Exchange Rate (In BDT)

Currency	Buying	Selling
USD	85.50	85.50
GBP	115.81	115.84
EUR	99.13	99.16

Today's World Stock Indices

Index	Today	Yesterday	%Change
S&P 500	4,357.040	4,357.040	0.00%
FTSE 100	7,032.27	7,027.07	0.07%
NIKKEI 225	28,444.89	28,771.07	-1.13%

Sectoral P/E

IT Sector	32.06
Bank	7.68
Textile	48.62
Pharmaceuticals & Chemicals	21.80
Engineering	17.07
Insurance	20.98
Miscellaneous	36.98
Food & Allied	38.76
Fuel & Power	13.61
Tannery Industries	89.35
Cement	33.15
Financial Institutions	86.90
Travel & Leisure	417.82
Paper & Printing	50.76
Telecommunications	14.66
Services & Real Estate	35.12
Ceramics	37.17
Jute	-39.70
Market	**17.33**

Source: AmarStock, Stock Bangladesh and ACAML Research

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