Alliance Capital Asset Management Limited

# Daily Market Review

**3-Mar-22**

## Market Statistics

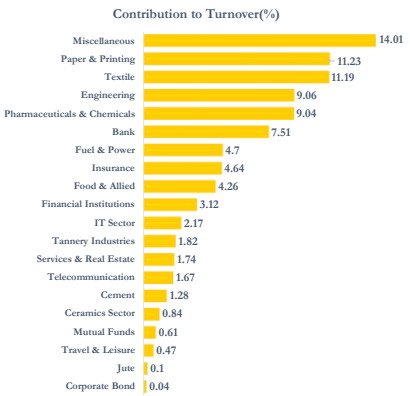
| Particulars | Today | Yesterday | Change | Δ Point | Movers & Shakers | |
|---|---|---|---|---|---|---|
| **DSEX Index** | 6,696.52 | 6,699.84 | -0.05% | -3.32 | Issues Advanced | 165 |
| DSES Index | 1,441.99 | 1,443.42 | -0.10% | -1.43 | Issues Declined | 139 |
| DS30 Index | 2,462.94 | 2,470.51 | -0.31% | -7.57 | Issues Unchanged | 75 |
| Market Cap(BDT Mn) | 5,384,274.19 | 5,395,236.13 | -0.20% | -10961.93 | Total Issue Traded | 379 |
| **Turnover (BDT Mn)** | 6445.54 | 6560.62 | -1.75% | -115.08 | | |

| Market Mover | Closing Price | YCP | Value (BDT Mn) |
|---|---|---|---|
| SONALIPAPR | 756.80 | 745.80 | 633.23 |
| BSC | 118.20 | 120.70 | 430.96 |
| BEXIMCO | 152.40 | 152.50 | 372.40 |
| DELTALIFE | 154.50 | 153.60 | 311.96 |
| FORTUNE | 123.30 | 123.00 | 234.05 |
| ORIONPHARM | 100.60 | 99.90 | 147.53 |
| UNIONBANK | 12.10 | 12.10 | 94.11 |
| FAREASTLIF | 95.20 | 93.20 | 93.25 |
| SAIFPOWER | 39.70 | 39.70 | 92.26 |
| BRACBANK | 51.40 | 51.50 | 80.95 |

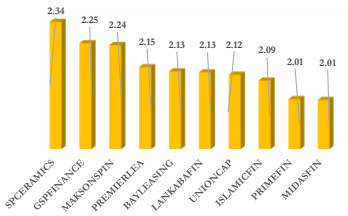
| Top Gainers | Closing Price | YCP | Change % |
|---|---|---|---|
| HWAWELLTEX | 45.60 | 42.20 | 8.06 |
| SHURWID | 21.10 | 19.70 | 7.11 |
| BDTHAIFOOD | 38.50 | 36.30 | 6.06 |
| ZAHEENSPIN | 9.90 | 9.40 | 5.32 |
| ACMEPL | 34.80 | 33.20 | 4.82 |
| KPCL | 32.30 | 30.90 | 4.53 |
| TAMIJTEX | 264.80 | 253.90 | 4.29 |
| RENWICKJA | 1068.60 | 1025.50 | 4.20 |
| PEOPLESINS | 62.80 | 60.50 | 3.80 |
| VAMLRBBF | 8.40 | 8.10 | 3.70 |

| Top Losers | Closing Price | YCP | Change % |
|---|---|---|---|
| NCCBLMF1 | 7.40 | 8.10 | -8.64 |
| AOL | 40.20 | 42.60 | -5.63 |
| YPL | 23.40 | 24.60 | -4.88 |
| ZEALBANGLA | 157.80 | 164.20 | -3.90 |
| CROWNCEMNT | 64.20 | 66.80 | -3.89 |
| PRIMEINSUR | 82.60 | 85.70 | -3.62 |
| FAREASTFIN | 5.50 | 5.70 | -3.51 |
| TAKAFULINS | 75.90 | 78.60 | -3.44 |
| BIFC | 6.20 | 6.40 | -3.13 |
| IMAMBUTTON | 34.20 | 35.30 | -3.12 |

## Sector Performance




## Today's Market Beta (Top Ten)




## Block Transactions

| Ticker | Trade | Quantity | Val (BDT mn) |
|---|---|---|---|
| QUEENSOUTH | 2 | 60,000 | 1.50 |
| PRIMEINSUR | 6 | 78,800 | 6.70 |
| DSSL | 1 | 100,000 | 1.82 |
| GENEXIL | 1 | 100,000 | 15.03 |
| IBNSINA | 1 | 100,000 | 29.00 |
| BRACBANK | 1 | 100,890 | 5.19 |
| NATLIFEINS | 1 | 193,000 | 43.04 |
| ONEBANKLTD | 1 | 300,000 | 3.90 |
| CNATEX | 3 | 320,000 | 2.85 |
| SAIFPOWER | 2 | 400,000 | 15.08 |

## Exchange Rate

(In BDT)

| Currency | Buying | Selling |
|---|---|---|
| USD | 86.00 | 86.00 |
| GBP | 115.27 | 115.33 |
| EUR | 95.64 | 95.66 |

## Today's World Stock Indices

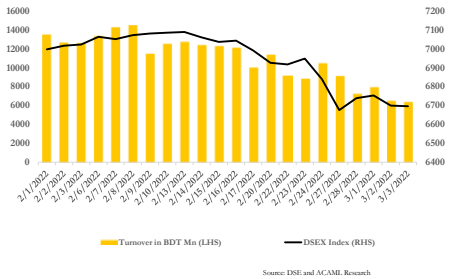
| Index | Today | Yesterday | %Change |
|---|---|---|---|
| S&P 500 | 4,306.260 | 4,373.940 | -1.55% |
| FTSE 100 | 7,379.89 | 7,445.68 | -0.88% |
| NIKKEI 225 | 26,393.03 | 26,844.72 | -1.68% |

## 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) stayed in the red, decreasing 0.05% to settle at 6,696.52 . The DS30 index, comprising blue chips, decreased by 7.57 points to stand at 2,462.94 and DSE Shariah lost by 1.43 points, eventually reaching 1,441.99.

Turnover, an integral metric for gauging overall market outlook, stood at BDT. 6445.54 million on DSE, decreasing 1.75 % to reflect a slowdown in investor participation.

SONALIPAPR secured the top position in the turnover list with shares worth BDT. 633.23 million changing hands, which was followed by BSC, BEXIMCO and DELTALIFE .

While HWAWELLTEX led the gainer's list, illustrating an increase of 8.06 per cent, NCCBLMF1 was the worst performer, what with losing around 8.64 per cent in relation to its previous closing price.

In the sectoral font, a major portion of investor activity revolved around Miscellaneous which occupied around 14.01 % of turnover distribution and outperformed the other sectors followed by Paper & Printing and Textile .

## UPCOMING IPOs

| Name | Issue Manager | Method | IPO Size( BDT Mn) |
|---|---|---|---|

## 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** | 11.13 |
| **Sale Price** | 10.90 |
| **Repurchase Price** | 10.60 |

## 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** | 9.85 |
| **Sale Price Per Unit** | 9.75 |
| **Repurchase Price** | 9.45 |


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