Alliance Capital Asset Management Limited

Daily Market Review

26-Sep-21

Market Statistics

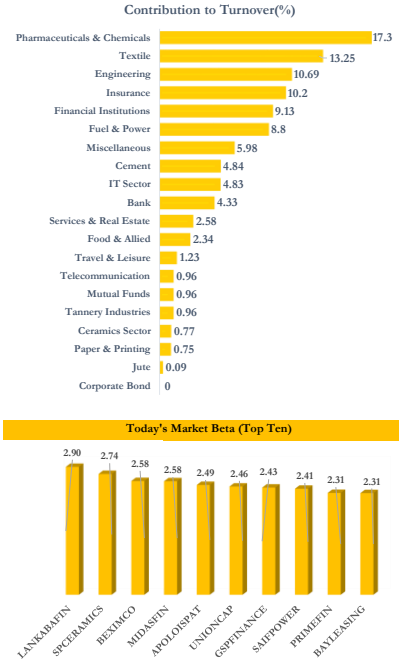
Particulars	Today	Yesterday	Change	Δ Point	Movers & Shakers	
DSEX Index	7,237.14	7,250.60	-0.19%	-13.46	Issues Advanced	113
DSES Index	1,574.59	1,581.05	-0.41%	-6.47	Issues Declined	230
DS30 Index	2,665.61	2,673.56	-0.30%	-7.95	Issues Unchanged	33
Market Cap(BDT Mn)	5,755,232.24	5,770,365.83	-0.26%	-15133.59	Total Issue Traded	376
Turnover (BDT Mn)	22,572.94	18,524.29	21.86%	4048.65		

Market Mover	Closing Price	YCP	Value (BDT Mn)
ORIONPHARM	84.40	77.60	1,420.58
BEXIMCO	137.50	134.40	991.38
LHBL	80.10	78.50	912.49
SPCL	124.70	114.20	815.11
DELTALIFE	181.80	181.50	598.49
BXPHARMA	237.90	245.60	594.04
GENEXIL	120.80	116.30	463.87
MAKSONSPIN	33.60	32.60	422.60
ACTIVEFINE	28.10	28.30	383.71
SSSTEEL	26.40	25.70	369.38

Top Gainers	Closing Price	YCP	Change %
AAMRANET	59.80	54.40	9.93
TOSRIFA	24.40	22.20	9.91
KBPPWBIL	15.80	14.40	9.72
ETL	14.80	13.50	9.63
ZAHEENSPIN	11.50	10.50	9.52
SPCL	124.70	114.20	9.19
SILVAPHL	24.80	22.80	8.77
ORIONPHARM	84.40	77.60	8.76
NEWLINE	33.80	31.70	6.62
DAFODILCOM	67.40	63.50	6.14

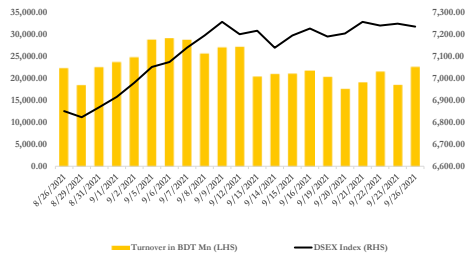
Top Losers	Closing Price	YCP	Change %
CVOPRL	231.10	250.20	-7.63
ICBAMCL2ND	13.60	14.60	-6.85
TAMIJTEX	162.00	172.80	-6.25
RUPALILIFE	81.30	86.30	-5.79
DSHGARME	253.40	266.90	-5.06
PRAGATILIF	106.80	112.40	-4.98
AMCL(PRAN)	280.30	294.80	-4.92
MEGCONMILK	22.10	23.20	-4.74
KAY&QUE	314.10	328.80	-4.47
AFCAGRO	34.40	36.00	-4.44

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) fell 0.19% to settle at 7,237.14 following a modest increase in the previous session. The DS30 index, comprising blue chips, slipped by 7.95 points to stand at 2,665.61 and DSE Shariah index slipped 6.47 points, eventually reaching 1,574.59. Investors offloading their positions of sector wise stocks which showed recent outperformance drove the key bourses down.

Turnover, an integral metric for gauging overall market outlook, stood at BDT. 22,572.94 million on DSE, rising by 21.86% to reflect a rise in investor participation. ORIONPHARM stood at the top position in the turnover list with shares worth BDT. 1,420.58 million changing hands, which was followed by BEXIMCO LHBL and SPCL.

While AAMRANET led the gainer's list, illustrating an increase of 9.93 per cent, CVOPRL was the worst performer, what with losing around 7.63 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 17.3 % 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)
PTL	2	67,575	4.53
ABBANK	1	170,000	2.86
WMSHIPYARD	1	200,000	3.24
PHOENIXFIN	2	332,000	11.11
DELTALIFE	4	510,000	89.46
SONALILIFE	1	540,000	40.50
ORIONPHARM	11	957,800	74.65
PADMALIFE	2	1,275,000	69.40
SQURPHARMA	3	1,300,000	317.76
ICBIBANK	3	14,174,692	98.79

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	7,078.35	7,056.62	0.31%
NIKKEI 225	30,248.81	29,639.40	2.06%

Sectoral P/E

IT Sector	31.60
Bank	7.76
Textile	49.06
Pharmaceuticals & Chemicals	21.56
Engineering	16.60
Insurance	22.37
Miscellaneous	35.87
Food & Allied	37.00
Fuel & Power	13.12
Tannery Industries	147.61
Cement	28.97
Financial Institutions	113.31
Travel & Leisure	362.78
Paper & Printing	49.92
Telecommunications	14.72
Services & Real Estate	32.02
Ceramics	35.61
Jute	-42.68
Market	**17.02**

Source: AmarStock, Stock Bangladesh and ACAML Research

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