

Weekly Stock Market Report



WEEKLY MARKET UPDATE 03-07 September 2023

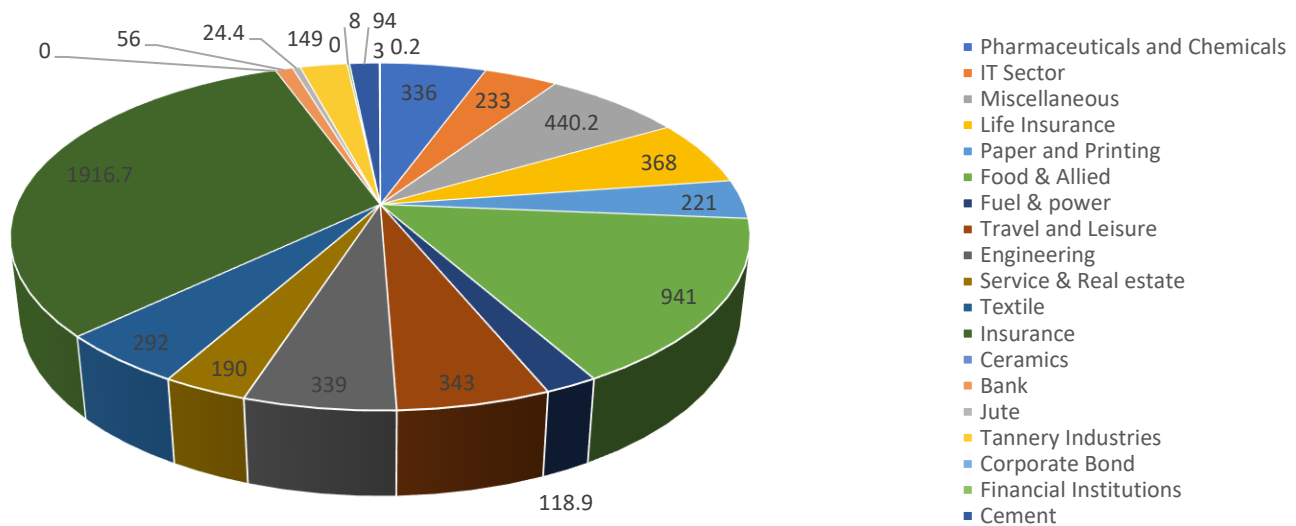
DSE Index Summary

Index	07-Sep-23	31-Aug-23	Point Change	% Change
DSEX	6307.08	6299.50	7.586	0.120%
DSES	1369.19	1372.52	-3.333	-0.243%
DSE30	2137.10	2141.61	-4.514	-0.211%

CSE Index Summary

Index	07-Sep-23	31-Aug-23	Point Change	% Change
CS50	1307.61	1305.4662	2.144	0.164%
CS30	13404.48	13367.7865	36.693	0.274%
CSCX	11151.1	11101.8851	49.215	0.443%

Sector wise weekly Turnover Change Contribution



Weekly Market Commentary

The DSEX indexed has increased by 0.120% and increased 7.586 points. The DSES index showed Negative momentum and down by -0.243%. However, we have seen a Negative trend in DSE30 and it decreased by 4.514 points. We have witnessed a positive trend in the 3 index in CSE. CS50 gain 2.144 points, CS30 index has gained 36.693 points and CSCX has gained 49.215 points. The Bangladesh Securities and Exchange Commission (BSEC) has recently granted permission to the country's premier bourse to carry out an investigation in order to uncover the facts behind the non-compliance. According to the BSEC, the 14 companies are Fortune Shoes, National Feed Mills, Central Pharmaceuticals, CVO Petrochemical Refinery, Dulamia Cotton Spinning Mills, Family Tex (BD), Keya Cosmetics, Khan Brother PP Woven Bag Industries, Northern Jute Manufacturing Company, Regent Textile Mills, The Dacca Dyeing and Manufacturing Company, Usmania Glass Sheet Factory, Zaheen Spinning, and Zaheen Tex Industries.

DSE SME Index Summary

Index	07-Sep-23	31-Aug-23	Point Change	% Change
DSMEX	1298.07009	1336.4439	-38.37	-0.029

Index	Issues Advanced	Issues declined	Issues Unchanged
DSMEX	9	3	4

DSE	
Issues Advanced	53
Issues declined	109
Issues Unchanged	167

CSE	
Issues Advanced	45
Issues declined	59
Issues Unchanged	64
Issues Traded	168

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Weekly observation

Economic Update		
Forex Reserve Gross (July-2023)	29732.1	USD in Mn
Call Money Rate (Overnight)	6.28	Average Interest Rate
Inflation Rate (Point to Point)	9.69%	July-23
Consumer Price Index	112.46	June-23

MARKET CAPITALISATION	
1. EQUITY	4492193552869.71
2. MUTUAL FUND	37460745454.04
3. DEBT SECURITIES	3234646012724.70
TOTAL	7764300311048.45

GIB: Category Change

The Company will be placed in 'A' category from existing 'N' category with effect from September 10, 2023 as the Company has reported disbursement of 5% Cash and 5% Stock Dividend for the year ended December 31, 2022.

TOTAL TRANSACTIONS

A. NO. OF TRADES	155663
B. VOLUME(Nos.)	140276572
C. VALUE(Tk)	7007851136.60

Weekly Top Performer

Top 10 Gainer (Closing Price-All companies)		
Company	Close price	Change
PARAMOUNT	52.60	9.81%
PIONEERINS	79.40	7.44%
STANDARINS	47.20	5.83%
SONARBAINS	48.60	4.74%
RELIANCINS	75.20	4.59%
GREENDELT	78.70	4.52%
TAKAFULINS	45.60	4.35%
MEGHNALIFE	74.40	3.33%
SAMATALETH	61.80	3.00%
YPL	29.30	2.81%

Top 10 Loser (Closing Price-All companies)		
Instrument	Close price	% Change
KBPPWBIL	24.9	-8.46%
MEGHNAPEP	33.7	-7.16%
SEAPEARL	165.80	-6.33%
CRYSTALINS	72.50	-6.09%
DAFODILCOM	78.50	-5.31%
LEGACYFOOT	120.80	-4.73%
NORTHERN	204.00	-4.70%
EHL	98.70	-4.17%
INTRACO	39.30	-4.15%
PRIMELIFE	52.80	-4.00%

Top 10 Companies by Value

Company	% change	Turnover Value in Tk.
FUWANGFOOD	-3.73%	568.24
SEAPEARL	-6.33%	219.4
PIONEERINS	7.44%	207.55
EHL	-4.17%	184.99
CONTININS	-3.54%	165.6
SONALIPAPR	-0.36%	161.34
MIRACLEIND	1.88%	158.24
GREENDELT	4.52%	147.61
LEGACYFOOT	-4.73%	136.16
YPL	2.81%	133.22

Market Parameter

Variables	05 Sep 2023	04 Sep 2023	Change
Market Annualized PE	19.02	18.99	0.16%
Turnover Velocity	15.30%	14.92%	0.38%
Market RSI (14 Days)	55.57	52.78	5.29%
Market MFI (14 Days)	81.98	75.74	8.24%
Dividend Yield	3.21%	3.21%	0.00%
Market Cap (BDT Bn)	7769.52	7765.17	0.06%
Market Cap (USD bn)	70.63	70.59	0.06%
Market Cap to GDP Ratio	19.56%	19.55%	0.01%

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Currency Update- 07-09-2023

Currency	Buy	Sell
Saudi Riyal (SAR)	29.1263	29.3929
UAE Dirham (AED)	29.7449	30.0172
US Dollar (USD)	109.5000	110.0000
EURO (EUR)	117.2034	118.2762
Pound sterling (GBP)	136.5844	137.8346
Japanese Yen (JPY)	0.7404	0.7472
Swiss franc (CHF)	122.5738	123.6957
Australian Dollar (AUD)	69.6086	70.2458
Canadian Dollar (CAD)	80.0572	80.7899
Swedish Krona (SEK)	9.8318	9.9218
Singapore Dollar (SGD)	80.0865	80.8196
Chinese Yuan (CNY)	14.9098	15.0463
Indian Rupee (INR)	1.3144	1.3264
Saudi Riyal (SAR)	29.1263	29.3929
UAE Dirham (AED)	29.7449	30.0172
US Dollar (USD)	109.5000	110.0000
EURO (EUR)	117.2034	118.2762

SOURCE : STANDARD CHARTERED BANK

World Stock & Commodities

	07-Aug-23	Change	Change %
Crude Oil (WTI)*	USD 81.69	USD +0.06	+0.05%
Crude Oil (Brent)*	USD 85.25	USD +0.01	+0.01%
Gold Spot'	USD 1,971.80	USD -1.15	-0.75%
S&P 500	4,514.87	+17.24	+0.38%
FTSE 100	7,320.53	49.77	1.47%
BSE SENSEX	65,782.78	4,942.04	0.68%
KSE-100	47,863.57	444.94	0.92%

MACROECONOMIC INDICATORS

Indicators/Years	2018	2019	2020	2021	2022	2023
GDP	\$321.38B	\$351.24B	\$373.90B	\$416.26B	\$460	
Per Capita GDP	\$1,991	\$2,154	\$2,270	\$1684	\$1785	
GDP Growth	7.32%	7.88%	3.45%	6.94%	7.25%	
GNI	\$329.87B	\$366.49B	\$385.22B	\$435.53B	31521	33480
Population	163,683,958	165,516,222	167,420,951	169,356,251	171 Mn	
Trade Balance	\$-23.03B	\$-18.93B	\$-20.14B	\$-26.63B	-	-
Foreign Direct Investment	\$2.42B	\$1.91B	\$1.53B	-	-	-
Unemployment Rate	4.3	4.2	5.3	5.2	4.7	-
Import Prices	246.03	259.38	269.73	283.38	-	-
GDP Deflator	219.37	229.41	240.29	249.42	-	-

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Sector Statistics

SL NO	Sector	Total Closing Price	Current EPS	P/E	Market Cap(Crore)	Market Cap (%)	Traded Company
1	Bank	611.4	90.97	7.05	68,287.72	8.80%	33
2	Cement	622.1	35.9	20.7	12,327.75	1.59%	7
3	Ceramics Sector	201.2	2.51	78.12	3,144.60	0.41%	4
4	Corporate Bond	0	0	0	3,366.43	0.43%	4
5	Debenture	0	0	0	9.84	0.00%	0
6	Engineering	4,078.60	57.45	89.35	53,077.59	6.84%	38
7	Financial Institutions	465.5	21.7	38.35	18,667.55	2.40%	15
8	Food & Allied	7,909.80	135.65	45	40,368.76	5.20%	23
9	Fuel & Power	4,502.90	186.63	19.58	45,466.81	5.86%	16
10	Insurance	2,471.50	120.97	19.93	18,297.77	2.36%	56
11	IT Sector	574.5	21.03	25.49	4,066.54	0.52%	11
12	Jute	536.6	1.76	304.9	391.27	0.05%	3
13	Miscellaneous	7,681.10	133.52	22.08	23,980.29	3.09%	18
14	Mutual Funds	3,190.70	287.87	18.68	4,684.00	0.60%	18
15	Paper & Printing	1,208.50	41.53	31.81	4,112.44	0.53%	6
16	Pharmaceuticals & Chemicals	13,024.40	441.49	32.15	72,624.11	9.35%	34
17	Services & Real Estate	231.6	10.12	31.03	2,842.86	0.37%	4
18	Tannery Industries	1,390.70	77.24	24.95	3,559.14	0.46%	7
19	Telecommunication	535.5	44.7	14.41	58,023.18	7.47%	3
20	Textile	1,860.50	62.05	30.51	17,208.85	2.22%	41
21	Travel & Leisure	235.6	16.25	14.09	4,590.28	0.59%	3
22	Treasury Bond	0	0	0	54,772.84	7.05%	0

Global Indices

Index

	Open	Prev Close	52-wk high	52-wk low
AMERICA				
Dow Jones (USA)	34,847.80	34,852.67	35,679.13	28,660.94
NASDAQ 100 (USA)	15,386.67	15,376.55	15,932.05	10,440.64
S & P 500 (USA)	4,500.34	4,497.63	4,607.07	3,491.58
EUROPE				
MDAX (Germany)	27,669.88	27,664.93	29,815.39	21,456.66
CAC 40 (France)	7,396.14	7,373.43	7,581.26	5,628.42
FTSE 100 (Britain)	7,464.99	7,464.99	8,047.06	6,707.62
ASIA				
Hang Seng (Hong Kong)	18,580.47	18,482.86	22,700.85	14,597.31
Kospi (Republic Of Korea)	2,564.45	2,561.22	2,668.21	2,134.77
Nikkei 225 (Japan)	32,361.02	32,333.46	33,772.89	25,621.96
Sensex (India)	65,178.33	65,087.25	67,619.17	56,147.23
Shanghai Composite (China)	3,134.55	3,137.14	3,418.95	2,885.09
NIFTY 50	19,375.55	19,347.45	19,991.85	16,747.70

POLICY RATE

Rate Name	%
Repo Rate	6.50%
SLF Rate	8.50%
SDF Rate	4.50%
Bank Rate	4.00%

RESERVE RATIO

	SLR	CRR
Traditional Banking	13%	4.00%
Islamic Banking	5.50%	4.00%
Deposit Taker FIs	5%	1.50%
Non Deposit Taker FIs	2.50%	N/A

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Weekly Block Transactions August 24

Instr Code	Max Price	Min Price	Trades	Quantity	Value(In Mn)	Instr Code	Max Price	Min Price	Trades	Quantity	Value(In Mn)
AAMRANET	67.8	67.8	1	8700	0.59	JAMUNAOIL	186	186	1	125000	23.25
ABBISTMF	5	5	2	230000	1.15	KBPPWBIL	27.6	27.3	3	90700	2.482
ACTIVEFINE	17.4	17.4	2	600000	10.44	LIBRAINFU	879	879	1	2450	2.154
AL-HAJTEX	181.5	175.1	3	23500	4.225	LRBDL	35	31.6	6	151914	4.971
ASIAPACINS	62	62	1	20000	1.24	MAKSONSPIN	20.2	20.2	1	54726	1.105
BANKASIA	21	21	1	95000	1.995	MEGHNALIFE	76.8	76.8	1	7000	0.538
BATBC	479.8	479.8	4	6002	2.88	MHSML	25.3	25.3	1	55399	1.402
BBSCABLES	45	45	2	92085	4.144	MIRACLEIND	43.1	43.1	1	50000	2.155
BEXGSUKUK	85	85	3	5880000	499.8	MJLBD	94	94	2	210000	19.74
BEXIMCO	115.3	104.1	7	223933	25.607	MPETROLEUM	204	204	1	15000	3.06
BRACBANK	32.3	32.3	2	937533	30.282	NAHEEACP	59	59	1	37000	2.183
BSCCL	218.9	218.9	1	20000	4.378	PADMAOIL	212	212	2	25000	5.3
BSRMLTD	81.1	81	5	32500	2.634	PROVATIINS	55.1	53.4	4	57456	3.13
BXPHERMA	131.6	131.6	1	5542	0.729	PTL	75	75	1	10600	0.795
CRYSTALINS	74.5	70	4	319000	23.374	RDFOOD	52.9	52.9	1	11000	0.582
DAFODILCOM	75	75	1	8000	0.6	ROBI	27.1	27	3	125417	3.393
DHAKAINS	58.5	58.5	1	50000	2.925	SALVOCHEM	61.8	61.8	1	8091	0.5
DUTCHBANGL	56.9	56.9	1	10000	0.569	SEAPEARL	186.2	173	6	194500	34.106
EASTERNINS	71.1	71	2	49999	3.552	SIMTEX	27.5	26.5	15	2789458	75.45
EBL	30	26.7	11	396581	11.364	SONALIPAPR	625	613	3	10144	6.314
EGEN	45.2	45.2	1	47120	2.13	SPCERAMICS	38.7	38.7	1	12920	0.5
EIL	34.9	34.9	1	15500	0.541	SQUARETEXT	69	69	1	25003	1.725
EMERALDOIL	156	155	5	88232	13.696	SQURPHARMA	215	215	2	175000	37.625
FAREASTLIF	68	67.5	4	30408	2.056	SUMITPOWER	30.6	30.6	1	16340	0.5
FASFIN	4.9	4.9	1	120000	0.588	TITASGAS	36.9	36.9	1	13551	0.5
FINEFOODS	123	123	1	10000	1.23	TOSRIFA	29	29	2	85000	2.465
FORTUNE	69.7	68.2	3	30527	2.097	UNIONINS	65	59	2	46000	2.864
GEMINISEA	812	807	4	3625	2.934	IITBARABANK	21.7	21.5	2	50000	1.08
GLOBALINS	34	34	1	25000	0.85						

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Data Source: Bangladesh Bank, Dhaka Stock Exchange, Bangladesh Securities and Exchange Commission,

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