

Weekly Stock Market Report



WEEKLY MARKET UPDATE 10-14 September 2023

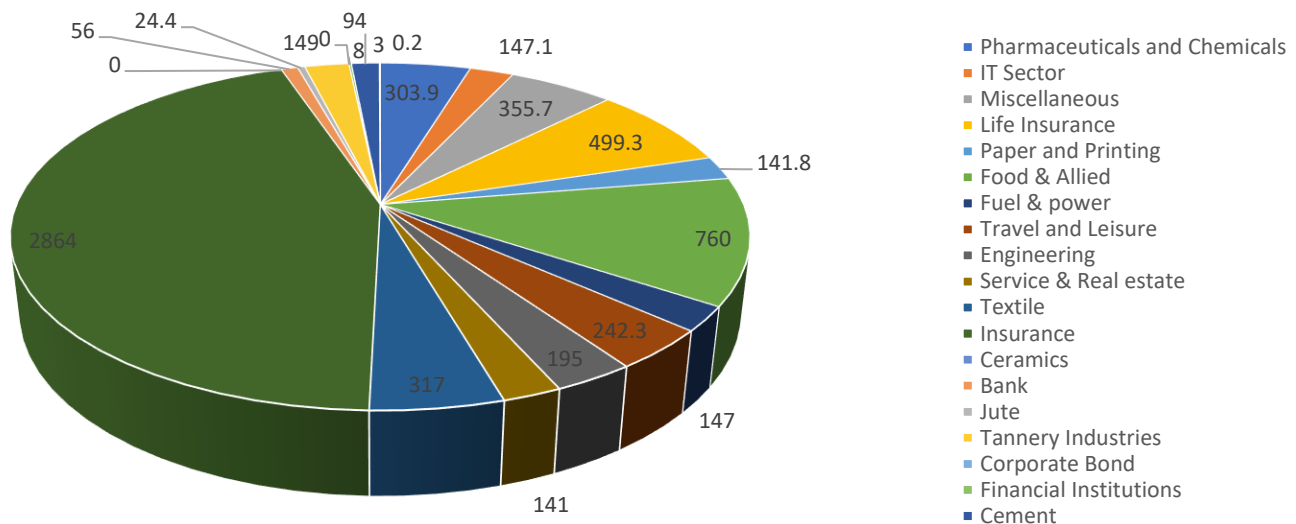
DSE Index Summary

Index	14-Sep-23	07-Sep-23	Point Change	% Change
DSEX	6302.03	6307.08	-5.052	-0.080%
DSES	1360.58	1369.19	-8.611	-0.629%
DSE30	2134.57	2137.10	-2.528	-0.118%

CSE Index Summary

Index	14-Sep-23	07-Sep-23	Point Change	% Change
CS50	1304.7393	1307.61	-2.871	-0.220%
CS30	13360.4485	13404.48	-44.031	-0.328%
CSI	1169.7453	1174.96	-5.215	-0.444%

Sector wise weekly Turnover Change Contribution



Weekly Market Commentary

The DSEX indexed has decreased by -0.080% and decreased 5.052 points. The DSES index showed Negative momentum and down by -0.629%. However, we have seen a Negative trend in DSE30 and it decreased by 8.611 points. We have witnessed a Negative trend in the 3 index in CSE. CS50 lose 2.871 points, CS30 index has decreased 44.031 points and CSI has loss 5.215 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	14-Sep-23	07-Sep-23	Point Change	% Change
DSMEX	1250.69496	1298.0701	-47.38	-0.036

Index	Issues Advanced	Issues declined	Issues Unchanged
DSMEX	12	1	3

DSE	
Issues Advanced	58
Issues declined	97
Issues Unchanged	164

CSE	
Issues Advanced	148
Issues declined	58
Issues Unchanged	52
Issues Traded	148

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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	4488410218644.72
2. MUTUAL FUND	37405262654.04
3. DEBT SECURITIES	3233517495589.30
TOTAL	7759332976888.06

PHOENIXFIN: Dividend Declaration

The Board of Directors has recommended No Dividend for the year ended December 31, 2022. Date of AGM: 07.12.2023, Time: 11:30 AM, Venue: Digital Platform through the link: <https://phoenixfinance.bdvirtualagm.com>. Record Date: 12.10.2023.

TOTAL TRANSACTIONS

A. NO. OF TRADES	163260
B. VOLUME(Nos.)	132442582
C. VALUE(Tk)	6970875585.00

Weekly Top Performer

Top 10 Gainer (Closing Price-All companies)		
Company	Close price	Change
PARAMOUNT	68.30	9.98%
CRYSTALINS	99.30	9.97%
BGIC	61.00	9.91%
EASTERNINS	69.60	9.43%
STANDARDS	57.70	8.87%
DHAKAINS	64.60	6.78%
NITOLINS	45.00	6.64%
MIDLANDBNK	13.00	6.56%
ASIAPACINS	68.60	5.54%
UNIONCAP	7.70	5.48%

Top 10 Loser (Closing Price-All companies)		
Instrument	Close price	% Change
LEGACYFOOT	94.9	-9.71%
KBPPWBIL	21.00	-9.48%
MIRACLEIND	54.20	-5.57%
FUWANGFOOD	34.00	-4.49%
EMERALDOIL	150.20	-4.15%
KPPL	9.60	-4.04%
YPL	26.30	-4.01%
MEGHNACEM	61.80	-3.74%
METROSPIN	35.40	-3.54%
SKTRIMS	27.2	-3.20%

Top 10 Companies by Value

Company	% change	Turnover Value in Tk.
FUWANGFOOD	-4.49%	334.22
EASTERNINS	9.43%	262.81
CONTININS	3.07%	254.75
GEMINISEA	-2.19%	234.16
MIRACLEIND	-5.57%	179.6
MEGHNALIFE	2.17%	176.09
ASIAPACINS	5.54%	170.59
GREENDELT	2.11%	167.14
PARAMOUNT	9.98%	165.26
BNICL	5.33%	161.28

Market Parameter

Variables	13 Sep 2023	12 Sep 2023	Change
Market Annualized PE	18.51	18.5	0.05%
Turnover Velocity	16.55%	16.11%	0.44%
Market RSI (14 Days)	51.87	50.47	2.77%
Market MFI (14 Days)	66.13	59.35	11.42%
Dividend Yield	3.22%	3.22%	0.00%
Market Cap (BDT Bn)	7759.69	7757.83	0.02%
Market Cap (USD bn)	70.54	70.53	0.02%
Market Cap to GDP Ratio	19.54%	19.53%	0.01%

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Currency Update- 14-09-2023

Currency	Buy	Sell	SOURCE : STANDARD CHARTERED BANK
Saudi Riyal (SAR)	29.1289	29.3954	
UAE Dirham (AED)	29.7435	30.0156	
US Dollar (USD)	109.5000	110.0000	
EURO (EUR)	117.4010	118.4749	
Pound sterling (GBP)	136.5308	137.7797	
Japanese Yen (JPY)	0.7428	0.7496	
Swiss franc (CHF)	122.4580	123.5782	
Australian Dollar (AUD)	70.3193	70.9626	
Canadian Dollar (CAD)	80.7114	81.4497	
Swedish Krona (SEK)	9.8276	9.9175	
Singapore Dollar (SGD)	80.3463	81.0813	
Chinese Yuan (CNY)	15.0147	15.1521	
Indian Rupee (INR)	1.3173	1.3293	
Saudi Riyal (SAR)	29.1289	29.3954	
UAE Dirham (AED)	29.7435	30.0156	
US Dollar (USD)	109.5000	110.0000	
EURO (EUR)	117.4010	118.4749	

World Stock & Commodities

	14-Aug-23	Change	Change %
Crude Oil (WTI)*	USD 89.12	USD +0.59	+0.68%
Crude Oil (Brent)*	USD 92.45	USD +0.57	+0.64%
Gold Spot'	USD 1,928.35	USD -4.15	-0.22%
S&P 500	4467.44	+17.24	+0.38%
FTSE 100	7561.83	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	610.4	91.01	7.05	68,187.71	8.79%	33
2	Cement	626.3	35.9	20.96	12,257.17	1.58%	7
3	Ceramics Sector	201.2	2.51	78.12	3,144.60	0.41%	5
4	Corporate Bond	0	0	0	3,366.43	0.43%	0
5	Debenture	0	0	0	9.84	0.00%	0
6	Engineering	4,046.10	72.29	62.98	52,954.50	6.82%	37
7	Financial Institutions	465.5	21.7	38.35	18,658.92	2.40%	16
8	Food & Allied	7,843.10	135.66	45	40,083.14	5.17%	22
9	Fuel & Power	4,445.30	186.68	19.19	45,466.39	5.86%	20
10	Insurance	2,649.50	120.95	22.02	19,197.15	2.47%	55
11	IT Sector	568	21.03	25.23	4,002.08	0.52%	11
12	Jute	532.9	1.76	302.8	387.04	0.05%	3
13	Miscellaneous	8,592.20	133.54	21.86	23,795.45	3.07%	17
14	Mutual Funds	3,189.80	287.88	18.68	4,678.45	0.60%	18
15	Paper & Printing	1,202.90	41.54	31.29	4,070.02	0.52%	6
16	Pharmaceuticals & Chemicals	12,963.60	441.34	30.87	72,275.46	9.31%	31
17	Services & Real Estate	231.9	10.12	31.03	2,841.98	0.37%	3
18	Tannery Industries	1,403.90	77.23	25.31	3,538.12	0.46%	7
19	Telecommunication	535.5	44.7	14.41	58,023.18	7.48%	3
20	Textile	1,852.60	62.05	30.51	17,144.29	2.21%	38
21	Travel & Leisure	240.7	16.25	14.39	4,669.23	0.60%	3
22	Treasury Bond	0	0	0	54,772.84	7.06%	0

Global Indices

Index

AMERICA	Open	Prev Close	52-wk high	52-wk low
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	Open	Prev Close	52-wk high	52-wk low
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	Open	Prev Close	52-wk high	52-wk low
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 (Based on Last working day)

Instr Code	Max Price	Min Price	Trades	Quantity	Value(In Mn)	Instr Code	Max Price	Min Price	Trades	Quantity	Value(In Mn)
AB BANK	8.8	8.8	1	79405	0.699	ICB	87.6	87.6	1	33075	2.897
ACFL	24.2	24.2	1	31000	0.75	JAMUNABANK	22.9	22.9	2	150000	3.435
ACMELAB	84.5	84.5	1	8000	0.676	KBPPWBIL	25.5	25.5	1	20000	0.51
AIL	88.5	88.5	1	18700	1.655	KDSALTD	77	77	1	259250	19.962
AL-HAJTEX	175.5	175.5	1	5000	0.877	KEYACOSMET	6.2	6.2	1	81000	0.502
AOL	32.9	32.9	3	200000	6.58	LHBL	73	73	1	8500	0.621
ASIAPACINS	62	62	1	10000	0.62	LRBDL	31.7	31.6	2	32503	1.029
BATBC	479.9	479.8	10	13057	6.265	MERCANBANK	13.3	13.3	2	2100000	27.93
BBS	19.5	19.5	1	26000	0.507	MERCINS	38.1	38.1	1	100000	3.81
BBSCABLES	48.9	48.9	1	11247	0.55	METROSPIN	38.5	38.5	1	14653	0.564
BEACONPHAR	266.4	223.6	3	80700	21.255	MIRACLEIND	62	54.5	3	81800	4.835
BEXIMCO	104.1	104.1	1	4997	0.52	ORIONPHARM	77.2	77.1	2	13000	1.003
BPPL	29.3	29.3	1	69500	2.036	PADMALIFE	37.1	37.1	1	15000	0.556
BRACBANK	32.3	32.3	46	6548926	211.53	PADMAOIL	205	205	1	2600	0.533
BSCCL	200.2	200.2	1	2931	0.587	PARAMOUNT	56	56	1	20000	1.12
BSRMLTD	90	90	1	553890	49.85	PDL	9.2	9.2	1	56000	0.515
BXPHARMA	131.6	131.6	1	5000	0.658	PHARMAID	731.7	731.7	1	684	0.5
CONTININS	52.3	52.3	2	20000	1.046	PRAGATILIF	134	116	2	27000	3.528
CRYSTALINS	93	83	3	140000	12.86	PREMIERBAN	12.7	12.7	1	50000	0.635
DHAKABANK	11.5	11.5	1	50000	0.575	PTL	77	77	1	6500	0.5
DUTCHBANGL	54.1	54	2	20000	1.081	RAHIMAFOOD	225.1	225.1	1	2500	0.563
EASTERNINS	68.5	61.5	2	23850	1.529	RENATA	1142	1142	1	978	1.117
EGEN	40.7	40.7	2	196525	7.999	SAIFPOWER	29.7	29.7	1	27000	0.802
EIL	33.2	33.2	1	25000	0.83	SEAPEARL	167	166	3	50000	8.303
EMERALDOIL	148	142.1	3	106500	15.193	SILCOPHL	21.1	21.1	2	50000	1.055
EXIMBANK	9.6	9.5	2	125000	1.194	SILVAPHL	19.5	19.5	1	40000	0.78
FAREASTLIF	75	73	2	16880	1.252	SONALILIFE	86.5	86.5	1	20000	1.73
FIRSTSBANK	8.1	8.1	1	62000	0.502	SONALIPAPR	680	680	2	27500	18.7
FORTUNE	74.7	74.7	1	6761	0.505						

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

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