

Weekly Stock Market Report



WEEKLY MARKET UPDATE 13-17 August 2023

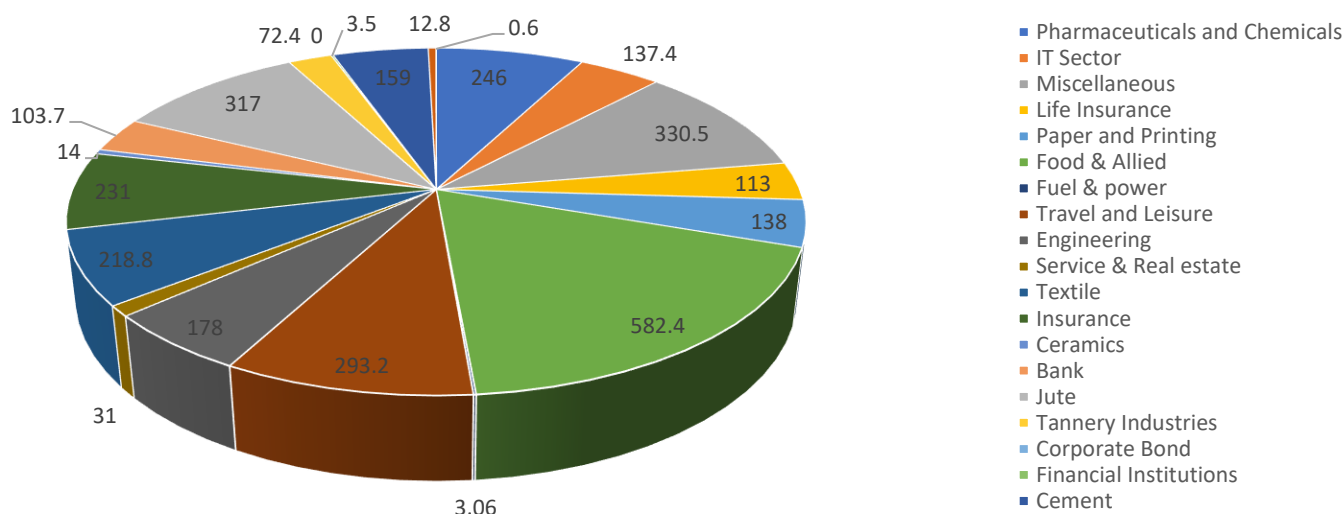
DSE Index Summary

Index	17-Aug-23	10-Aug-23	Point Change	% Change
DSEX	6254.83	6297.25	-42.424	-0.674%
DSES	1358.10	1368.05	-9.950	-0.727%
DSE30	2121.67	2142.94	-21.271	-0.993%

CSE Index Summary

Index	17-Aug-23	10-Aug-23	Point Change	% Change
CS50	1302.6293	1309.0218	-6.392	-0.488%
CS30	13306.54	13348.6835	-42.143	-0.316%
CSCX	11046.2394	11119.0674	-72.828	-0.655%

Sector wise weekly Turnover Change Contribution



Weekly Market Commentary

The DSEX indexed has decreased by 0.674% and dropped 42.424 points. The DSES index also showed negative momentum and dropped by 0.727%. However, we have seen a negative trend in DSE30 and it decreased by 21.271 points. We have witnessed a negative trend in the 3 index in CSE. CS50 lost 6.392 points, CS30 index has dropped 42.143 points and CSCX has dropped 72.828 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	17-Aug-23	10-Aug-23	Point Change	% Change
DSMEX	1262.70	1325.22	-62.516	-4.717%

Index	Issues Advanced	Issues declined	Issues Unchanged
DSMEX	15	1	1

DSE	
Issues Advanced	153
Issues declined	8
Issues Unchanged	160

CSE	
Issues Advanced	153
Issues declined	26
Issues Unchanged	66
Issues Traded	61

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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	4462104240858.85
2. MUTUAL FUND	37417948004.04
3. DEBT SECURITIES	3233837246748.90
TOTAL	7733359435611.78

FIRSTFIN: Dividend Declaration

The Board of Directors has recommended No dividend for the year ended December 31, 2022. Date of AGM: 30.09.2023, Time: 3:00 PM, Venue: Digital Platform. Record Date: 07.09.2023. The Company has also reported EPS of Tk. (14.52),

TOTAL TRANSACTIONS

A. NO. OF TRADES	87216
B. VOLUME(Nos.)	69889764
C. VALUE(Tk)	2995291992.70

Weekly Top Performer

Top 10 Gainer (Closing Price-All companies)		
Company	Close price	Change
MEGHNA PET	38.60	9.97%
OAL	11.4	9.62%
LEGACY FOOT	111.1	0.0946
FUWANG FOOD	30.30	9.39%
YPL	24.50	9.38%
DESH BANDHU	25.70	9.36%
SEAPEARL	182.40	8.57%
PAPER PROC	223.10	8.48%
NORTHERN	223.80	8.11%
INTECH	24.60	7.89%

Top 10 Loser (Closing Price-All companies)		
Instrument	Close price	% Change
NTC	412.00	-2.85%
AMBEEPHA	631.30	-1.48%
UNIONINS	55.80	-0.71%
RSRMSTEEL	18.20	-0.55%
MPETROLEUM	203.50	-0.25%
KOHINOOR	448.50	-0.07%
UNILEVERCL	2050.00	-0.03%
RECKITT BEN	4858.40	-0.02%
1JANATAMF	6.10	0.00%
ABBISTMF	5.20	0.00%

Top 10 Companies by Value

Company	% change	Turnover Value in Tk.
FUWANG FOOD	9.39%	276.26
BSC	4.68%	209.96
SEAPEARL	8.57%	167.24
SIMTEX	6.64%	86.89
KBPPWBIL	6.64%	72.77
DESH BANDHU	9.36%	68.36
BEXGSUKUK	0.00%	65.44
LEGACY FOOT	9.46%	62.12
GEMINISEA	3.94%	55.23
SONALIPAPR	1.60%	52.44

Market Parameter

Variables	16 Aug 2023	14 Aug 2023	Change
Market Annualized PE	18.74	18.82	-0.43%
Turnover Velocity	20.66%	21.52%	-0.86%
Market RSI (14 Days)	24.83	30.58	-18.80%
Market MFI (14 Days)	24.65	23.43	5.21%
Dividend Yield	3.25%	3.24%	0.01%
Market Cap (BDT Bn)	7714.39	7733.59	-0.25%
Market Cap (USD bn)	70.45	70.63	-0.25%
Market Cap to GDP Ratio	19.42%	19.47%	-0.05%

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Currency Update- 17-08-2023

Currency	Buy	Sell	SOURCE : STANDARD CHARTERED BANK
US Dollar (USD)	108.5000	109.5000	
EURO (EUR)	117.8636	118.9499	
Pound sterling (GBP)	137.7578	139.0293	
Australian Dollar (AUD)	69.4664	70.1048	
Chinese Yuan (CNY)	14.8368	14.9730	
Japanese Yen (JPY)	0.7376	0.7444	
Swiss franc (CHF)	123.2114	124.3470	
Norwegian Krone (NOK)	10.1926	10.2865	
Swedish Krona (SEK)	9.9166	10.0080	
Canadian Dollar (CAD)	80.3685	81.1073	
Hong Kong Dollar (HKD)	13.8535	13.9812	
Singapore Dollar (SGD)	79.8389	80.5729	
UAE Dirham (AED)	29.5391	29.8113	
Saudi Riyal (SAR)	28.9302	29.1969	
Danish Krone (DKK)	15.8179	15.9637	
Kuwaiti Dinars (KWD)	352.3871	355.6349	
Indian Rupee (INR)	1.3155	1.3160	

World Stock & Commodities

	17-Aug-23	Change	Change %
Crude Oil (WTI)*	USD 79.416	USD0.36	0.05%
Crude Oil (Brent)*	USD 86.47	USD 2.77	7.28%
Gold Spot'	USD 1894.43	USD 3.16	0.15%
S&P 500	4,513.39	673.89	17.55%
FTSE 100	7,561.63	109.89	1.47%
BSE SENSEX	65,782.78	4,942.04	8.12%
KSE-100	48,844.12	8,423.67	20.84%

MACROECONOMIC INDICATORS

Indicators/Years	2017	2018	2019	2020	2021	2022
GDP	\$293.75B	\$321.38B	\$351.24B	\$373.90B	\$416.26B	\$460
Per Capita GDP	\$1,840	\$1,991	\$2,154	\$2,270	\$1684	\$1785
GDP Growth	6.59%	7.32%	7.88%	3.45%	6.94%	7.25%
GNI	\$266.71B	\$329.87B	\$366.49B	\$385.22B	\$435.53B	
Population	161,793,964	163,683,958	165,516,222	167,420,951	169,356,251	171,186,372
Trade Balance	\$-12.81B	\$-23.03B	\$-18.93B	\$-20.14B	\$-26.63B	-
Foreign Direct Investment	\$1.81B	\$2.42B	\$1.91B	\$1.53B	-	-
Unemployment Rate	4.2	4.3	4.2	5.3	5.2	-
Import Prices	237.18	246.03	259.38	269.73	283.38	-
GDP Deflator	208.44	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	610.3	91	7.05	68,180.35	8.82%	32
2	Cement	622.5	35.9	20.69	12,109.88	1.57%	7
3	Ceramics Sector	202.8	2.51	78.12	3,150.96	0.41%	4
4	Corporate Bond	0	0	0	3,366.43	0.44%	1
5	Debenture	0	0	0	9.84	0.00%	0
6	Engineering	4,056.50	57.45	87.78	53,005.75	6.85%	34
7	Financial Institutions	465.5	21.7	38.35	18,675.32	2.41%	14
8	Food & Allied	7,679.80	135.6	45	39,977.26	5.17%	24
9	Fuel & Power	4,516.70	186.48	18.94	45,444.56	5.88%	19
10	Insurance	2,283.70	120.83	18.46	17,292.53	2.24%	53
11	IT Sector	545.7	21.67	24.94	3,891.56	0.50%	11
12	Jute	529.9	1.74	304.49	396.12	0.05%	3
13	Miscellaneous	4,237.60	133.41	21.63	23,248.98	3.01%	18
14	Mutual Funds	3,173.40	287.56	18.4	4,679.72	0.61%	23
15	Paper & Printing	1,180.50	41.52	31.91	3,963.08	0.51%	6
16	Pharmaceuticals & Chemicals	13,004.90	439.99	32.64	72,398.51	9.36%	33
17	Services & Real Estate	211	9.16	31.03	2,671.89	0.35%	4
18	Tannery Industries	1,398.90	77.27	25.21	3,552.62	0.46%	6
19	Telecommunication	535.5	46.43	12.93	58,023.18	7.50%	3
20	Textile	1,857.20	62.01	30.51	17,147.05	2.22%	41
21	Travel & Leisure	244.4	16.2	14.53	4,561.10	0.59%	2
22	Treasury Bond	0	0	0	54,772.84	7.08%	0

Global Indices

Index

	Open	Prev Close	52-wk high	52-wk low
AMERICA				
Dow Jones (USA)	34,914.96	34,946.39	35,679.13	28,660.94
NASDAQ 100 (USA)	15,021.63	15,037.65	15,932.05	10,440.64
S & P 500 (USA)	4,433.79	4,437.86	4,607.07	3,491.58
EUROPE				
MDAX (Germany)	27,690.98	27,786.29	29,815.39	21,456.66
CAC 40 (France)	7,246.73	7,267.70	7,581.26	5,628.42
FTSE 100 (Britain)	7,389.64	7,389.64	8,047.06	6,707.62
ASIA				
Hang Seng (Hong Kong)	18,023.11	18,329.30	22,700.85	14,597.31
Kospi (Republic Of Korea)	2,512.92	2,525.64	2,668.21	2,134.77
Nikkei 225 (Japan)	31,621.98	31,766.82	33,772.89	25,621.96
Sensex (India)	65,503.85	65,539.42	67,619.17	56,147.23
Shanghai Composite (China)	3,137.35	3,150.13	3,418.95	2,885.09
NIFTY 50	19,450.55	19,465.00	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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