

Weekly Stock Market Report



WEEKLY MARKET UPDATE 17-21 September 2023

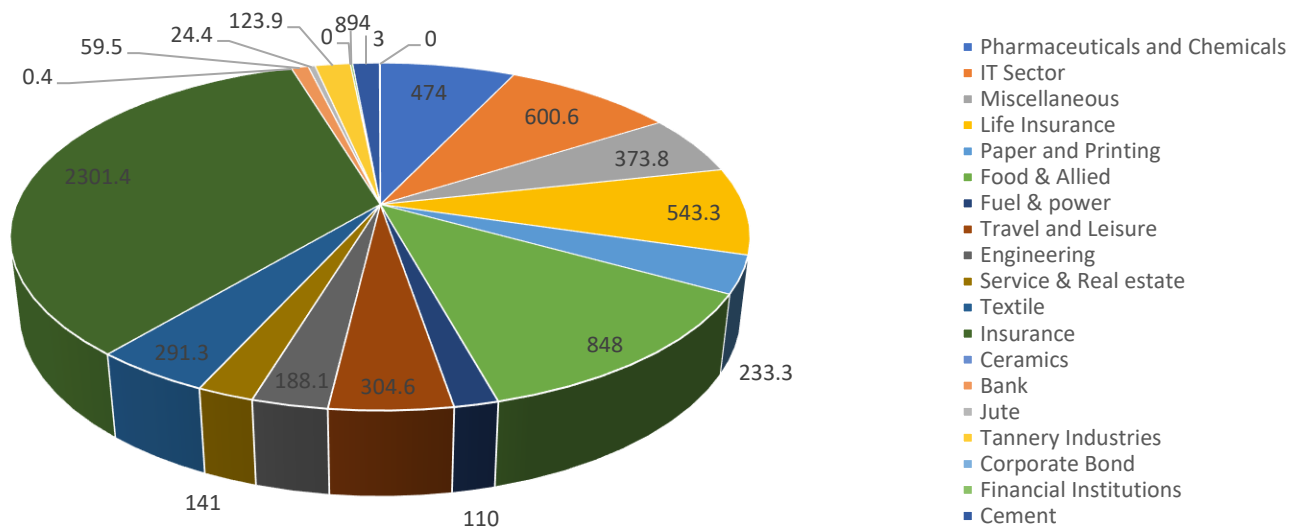
DSE Index Summary

| Index | 21-Sep-23 | 14-Sep-23 | Point Change | % Change |
|-------|-----------|-----------|--------------|----------|
| DSEX | 6309.75 | 6302.03 | 7.715 | 0.122% |
| DSES | 1364.61 | 1360.58 | 4.031 | 0.296% |
| DSE30 | 2146.10 | 2134.57 | 11.532 | 0.540% |

CSE Index Summary

| Index | 21-Sep-23 | 14-Sep-23 | Point Change | % Change |
|-------|------------|------------|--------------|----------|
| CS50 | 1308.24 | 1304.7393 | 3.501 | 0.268% |
| CS30 | 13378.5794 | 13360.4485 | 18.131 | 0.136% |
| CSI | 1171.0903 | 1169.7453 | 1.345 | 0.115% |

Sector wise weekly Turnover Change Contribution



Weekly Market Commentary

The DSEX indexed has increased by 0.122% and increased 7.715 points. The DSES index showed Positive momentum and up by 4.031. However, we have seen a Positive trend in DSE30. We have witnessed a positive trend in the 3 index in CSE. CS50 gain 3.501 points, CS30 index has increased 18.131 points and CSI has gain 1.345 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 | 21-Sep-23 | 14-Sep-23 | Point Change | % Change |
|-------|------------|-----------|--------------|----------|
| DSMEX | 1223.27485 | 1250.695 | -27.42 | -0.022 |

| Index | Issues Advanced | Issues declined | Issues Unchanged |
|-------|-----------------|-----------------|------------------|
| DSMEX | 6 | 8 | 1 |

| DSE | |
|------------------|-----|
| Issues Advanced | 69 |
| Issues declined | 84 |
| Issues Unchanged | 156 |

| CSE | |
|------------------|-----|
| Issues Advanced | 48 |
| Issues declined | 53 |
| Issues Unchanged | 62 |
| Issues Traded | 163 |

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Weekly observation

| Economic Update | | |
|-----------------------------------|---------|-----------------------|
| Forex Reserve Gross (August-2023) | 29260.7 | USD in Mn |
| Call Money Rate (Overnight) | 6.51 | Average Interest Rate |
| Inflation Rate (Point to Point) | 9.92% | August-23 |
| Consumer Price Index | 117 | August-23 |

| MARKET CAPITALISATION | |
|-----------------------|-------------------------|
| 1. EQUITY | 4492667029944.87 |
| 2. MUTUAL FUND | 37424633354.04 |
| 3. DEBT SECURITIES | 3260924901263.00 |
| TOTAL | 7791016564561.91 |

METROSPIN: Production to remain close for implementation of BMRE

Refer to their earlier news disseminated by DSE on 08.08.2023 regarding import of machineries to replace the old machineries, the company has further informed that the production of the company will remain close for the period of 12 months.

TOTAL TRANSACTIONS

| | |
|------------------|---------------|
| A. NO. OF TRADES | 167863 |
| B. VOLUME(Nos.) | 138087957 |
| C. VALUE(Tk) | 7353569577.50 |

Weekly Top Performer

| Top 10 Gainer (Closing Price-All companies) | | |
|---|-------------|--------|
| Company | Close price | Change |
| BDCOM | 38.60 | 9.97% |
| UNIONINS | 68.40 | 9.97% |
| SHYAMPSUG | 117.30 | 9.93% |
| KBPPWBIL | 24.50 | 9.87% |
| MIRACLEIND | 51.20 | 9.87% |
| KPPL | 10.10 | 9.78% |
| OAL | 10.70 | 7.00% |
| ISNLTD | 53.90 | 6.94% |
| AGNISYSL | 27.00 | 6.72% |
| AAMRATECH | 34.00 | 5.92% |

| Top 10 Loser (Closing Price-All companies) | | |
|--|-------------|----------|
| Instrument | Close price | % Change |
| UNITEDINS | 54.00 | -6.09% |
| KARNAPHULI | 38.50 | -5.87% |
| NORTHRNINS | 48.80 | -5.43% |
| BGIC | 56.50 | -5.36% |
| CONTININS | 46.00 | -5.15% |
| ASIAPACINS | 60.80 | -5.00% |
| JANATAINS | 43.90 | -4.98% |
| RUPALIINS | 33.10 | -4.89% |
| PARAMOUNT | 70.20 | -4.88% |
| STANDARINS | 48.7 | -4.88% |

Top 10 Companies by Value

| Company | % change | Turnover Value in Tk. |
|------------|----------|-----------------------|
| UNIONINS | 9.97% | 258.27 |
| FUWANGFOOD | -1.49% | 241.56 |
| GEMINISEA | -3.02% | 235.71 |
| METROSPIN | 0.37% | 204.58 |
| SEAPEARL | 3.43% | 186.06 |
| SQURPHARMA | 0.00% | 172.25 |
| SONALIPAPR | -1.03% | 162.25 |
| MIRACLEIND | 9.87% | 157.44 |
| EMERALDOIL | -1.92% | 150.18 |
| ASIAINS | -4.38% | 140.89 |

Market Parameter

| Variables | 20 Sep 2023 | 19 Sep 2023 | Change |
|-------------------------|-------------|-------------|---------|
| Market Annualized PE | 18.54 | 18.54 | 0.00% |
| Turnover Velocity | 19.76% | 19.04% | 0.72% |
| Market RSI (14 Days) | 53.71 | 53.92 | -0.39% |
| Market MFI (14 Days) | 64.62 | 72.12 | -10.40% |
| Dividend Yield | 3.22% | 3.22% | 0.00% |
| Market Cap (BDT Bn) | 7790.46 | 7764.15 | 0.34% |
| Market Cap (USD bn) | 70.82 | 70.58 | 0.34% |
| Market Cap to GDP Ratio | 19.61% | 19.55% | 0.06% |

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Currency Update- 21-09-2023

| Currency | Buy | Sell |
|-------------------------|----------|----------|
| Saudi Riyal (SAR) | 29.1274 | 29.3938 |
| UAE Dirham (AED) | 29.7443 | 30.0164 |
| US Dollar (USD) | 109.5000 | 110.0000 |
| EURO (EUR) | 116.2211 | 117.2842 |
| Pound sterling (GBP) | 134.6299 | 135.8614 |
| Japanese Yen (JPY) | 0.7369 | 0.7436 |
| Swiss franc (CHF) | 121.3899 | 122.5003 |
| Australian Dollar (AUD) | 70.0298 | 70.6704 |
| Canadian Dollar (CAD) | 80.9776 | 81.7183 |
| Swedish Krona (SEK) | 9.7771 | 9.8665 |
| Singapore Dollar (SGD) | 79.8764 | 80.6070 |
| Chinese Yuan (CNY) | 14.9452 | 15.0819 |
| Indian Rupee (INR) | 1.3146 | 1.3266 |
| Saudi Riyal (SAR) | 29.1274 | 29.3938 |
| UAE Dirham (AED) | 29.7443 | 30.0164 |
| US Dollar (USD) | 109.5000 | 110.0000 |
| EURO (EUR) | 116.2211 | 117.2842 |

SOURCE : STANDARD CHARTERED BANK

World Stock & Commodities

| | 21-Aug-23 | Change | Change % |
|--------------------|--------------|------------|----------|
| Crude Oil (WTI)* | USD 88.94 | USD -0.72 | -0.80% |
| Crude Oil (Brent)* | USD 92.80 | USD -0.73 | -0.74% |
| Gold Spot' | USD 1,948.95 | USD -18.05 | -0.92% |
| S&P 500 | 4402.20 | -41.75 | -0.94% |
| FTSE 100 | 7,731.65 | +71.45 | 0.93% |
| BSE SENSEX | 66,219.04 | -581.80 | 0.87% |
| KSE-100 | 45,976.70 | +44.18 | +0.10% |

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 | 609 | 91.02 | 7.05 | 68,112.06 | 8.74% | 32 |
| 2 | Cement | 621.3 | 35.9 | 20.78 | 12,270.28 | 1.57% | 6 |
| 3 | Ceramics Sector | 201.2 | 2.51 | 78.12 | 3,144.60 | 0.40% | 3 |
| 4 | Corporate Bond | 0 | 0 | 0 | 3,365.93 | 0.43% | 1 |
| 5 | Debenture | 0 | 0 | 0 | 9.84 | 0.00% | 0 |
| 6 | Engineering | 4,098.90 | 72.29 | 62.51 | 52,976.53 | 6.80% | 38 |
| 7 | Financial Institutions | 465.5 | 21.7 | 38.35 | 18,653.75 | 2.39% | 15 |
| 8 | Food & Allied | 8,164.30 | 135.66 | 45 | 40,225.18 | 5.16% | 23 |
| 9 | Fuel & Power | 4,444.80 | 186.74 | 19.38 | 45,414.87 | 5.83% | 17 |
| 10 | Insurance | 2,659.40 | 120.95 | 21.69 | 19,294.17 | 2.48% | 55 |
| 11 | IT Sector | 593.3 | 21.03 | 26.49 | 4,166.41 | 0.53% | 11 |
| 12 | Jute | 525.8 | 1.76 | 298.8 | 384.68 | 0.05% | 3 |
| 13 | Miscellaneous | 9,131.50 | 132.8 | 22.85 | 23,697.67 | 3.04% | 17 |
| 14 | Mutual Funds | 3,190.30 | 287.88 | 18.68 | 4,680.39 | 0.60% | 10 |
| 15 | Paper & Printing | 1,226.50 | 41.53 | 31.98 | 4,118.32 | 0.53% | 6 |
| 16 | Pharmaceuticals & Chemicals | 12,948.00 | 441.34 | 30.87 | 72,351.00 | 9.29% | 28 |
| 17 | Services & Real Estate | 236.9 | 10.12 | 31.03 | 2,890.12 | 0.37% | 2 |
| 18 | Tannery Industries | 1,403.30 | 77.23 | 25.63 | 3,534.73 | 0.45% | 7 |
| 19 | Telecommunication | 535.5 | 44.7 | 14.41 | 58,023.18 | 7.45% | 3 |
| 20 | Textile | 1,837.80 | 62.05 | 30.33 | 17,044.42 | 2.19% | 44 |
| 21 | Travel & Leisure | 259.5 | 15.26 | 16.16 | 4,871.93 | 0.63% | 3 |
| 22 | Treasury Bond | 0 | 0 | 0 | 54,772.84 | 7.03% | 0 |

Global Indices

Index

| | Open | Prev Close | 52-wk high | 52-wk low |
|----------------------------|-----------|------------|------------|-----------|
| AMERICA | | | | |
| Dow Jones (USA) | 34,440.88 | 34,517.73 | 35,679.13 | 28,660.94 |
| NASDAQ 100 (USA) | 14,969.92 | 15,191.23 | 15,932.05 | 10,440.64 |
| S & P 500 (USA) | 4,402.20 | 4,497.63 | 4,607.07 | 3,491.58 |
| EUROPE | | | | |
| MDAX (Germany) | 26,965.94 | 27,184.19 | 29,815.39 | 21,456.66 |
| CAC 40 (France) | 7,264.99 | 7,330.79 | 7,581.26 | 5,628.42 |
| FTSE 100 (Britain) | 7,694.34 | 7,731.65 | 8,047.06 | 6,707.62 |
| ASIA | | | | |
| Hang Seng (Hong Kong) | 17,655.41 | 17,885.60 | 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) | 32,571.03 | 33,023.78 | 33,772.89 | 25,621.96 |
| Sensex (India) | 66,213.33 | 66,800.84 | 67,927.23 | 56,147.23 |
| Shanghai Composite (China) | 3,084.70 | 3,137.14 | 3,418.95 | 2,885.09 |
| NIFTY 50 | 19,736.10 | 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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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) |
|------------|-----------|-----------|--------|----------|--------------|------------|-----------|-----------|--------|----------|--------------|
| ACFL | 24.3 | 24.2 | 2 | 70000 | 1.698 | FINEFOODS | 113 | 113 | 1 | 14100 | 1.593 |
| ACMELAB | 84.5 | 83.5 | 3 | 26000 | 2.186 | FUWANGCER | 15.8 | 15.7 | 2 | 64000 | 1.008 |
| ADNTEL | 131.5 | 131.5 | 1 | 15300 | 2.012 | FUWANGFOOD | 34.8 | 33.3 | 4 | 272000 | 9.38 |
| AL-HAJTEX | 169 | 169 | 1 | 10000 | 1.69 | GEMINISEA | 857 | 847 | 2 | 1500 | 1.28 |
| ANWARGALV | 220 | 194.7 | 3 | 11951 | 2.529 | GIB | 7.8 | 7.8 | 3 | 230980 | 1.802 |
| ARGONDENIM | 19.9 | 19.9 | 1 | 47645 | 0.948 | GOLDENSON | 20 | 20 | 1 | 200000 | 4 |
| BATBC | 500 | 479.8 | 3 | 3711 | 1.801 | GP | 261.6 | 261.6 | 1 | 1920 | 0.502 |
| BAYLEASING | 21.6 | 21.6 | 1 | 36000 | 0.778 | GSPFINANCE | 30.2 | 30.2 | 1 | 40000 | 1.208 |
| BBSCABLES | 54.8 | 45 | 3 | 114032 | 6.074 | HRTEX | 114 | 104.4 | 8 | 44127 | 4.693 |
| BDFINANCE | 39.8 | 39.8 | 1 | 196424 | 7.818 | IBP | 17 | 17 | 1 | 47000 | 0.799 |
| BEACONPHAR | 223.6 | 223.6 | 2 | 15000 | 3.354 | IDLC | 41.9 | 41.9 | 1 | 11934 | 0.5 |
| BEXIMCO | 115.5 | 104.1 | 2 | 12408 | 1.349 | IFADAUTOS | 39.8 | 39.7 | 2 | 27881 | 1.108 |
| BRACBANK | 32.4 | 32.3 | 7 | 7450662 | 240.7 | IMAMBUTTON | 135.1 | 135 | 2 | 8140 | 1.099 |
| BSCCL | 214 | 214 | 1 | 2348 | 0.502 | INTRACO | 38 | 38 | 1 | 60890 | 2.314 |
| CENTRALINS | 43.5 | 43.5 | 2 | 38000 | 1.653 | ITC | 39.3 | 39.3 | 1 | 15000 | 0.59 |
| CNATEX | 9.5 | 9.4 | 4 | 360000 | 3.4 | JAMUNABANK | 18.9 | 18.9 | 1 | 44000 | 0.832 |
| CONFIDCEM | 89 | 89 | 1 | 10000 | 0.89 | JHRML | 86.3 | 86.3 | 1 | 23996 | 2.071 |
| CONTININS | 51 | 51 | 1 | 50000 | 2.55 | KDSALTD | 77 | 77 | 1 | 259250 | 19.962 |
| CRYSTALINS | 125 | 115 | 5 | 174750 | 21.444 | KEYACOSMET | 6 | 6 | 4 | 338334 | 2.03 |
| CVOPRL | 188 | 188 | 3 | 10000 | 1.88 | LEGACYFOOT | 90 | 90 | 1 | 5560 | 0.5 |
| DAFODILCOM | 94 | 94 | 1 | 8500 | 0.799 | LOVELLO | 34.5 | 34.5 | 1 | 15000 | 0.517 |
| DULAMIACOT | 63.8 | 63.8 | 1 | 85799 | 5.474 | MAKSONSPIN | 24.5 | 24.5 | 1 | 54726 | 1.341 |
| DUTCHBANGL | 60 | 60 | 1 | 41000 | 2.46 | MALEKSPIN | 29.7 | 29.7 | 1 | 23995 | 0.713 |
| EASTERNINS | 76.2 | 76.2 | 1 | 9500 | 0.724 | MIRAKHTER | 49.4 | 49.4 | 1 | 25000 | 1.235 |
| EASTLAND | 30.3 | 30.3 | 1 | 20000 | 0.606 | MONNOAGML | 778 | 776 | 5 | 5000 | 3.885 |
| EGEN | 40.7 | 40.7 | 2 | 24800 | 1.009 | NPOLYMER | 49 | 49 | 1 | 10500 | 0.514 |
| EMERALDOIL | 160 | 137 | 5 | 629450 | 87.747 | OAL | 9 | 9 | 1 | 199879 | 1.799 |
| FAREASTLIF | 67.5 | 67.5 | 2 | 20000 | 1.35 | | | | | | |

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

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