

Weekly Stock Market Report



WEEKLY MARKET UPDATE 27-31 August 2023

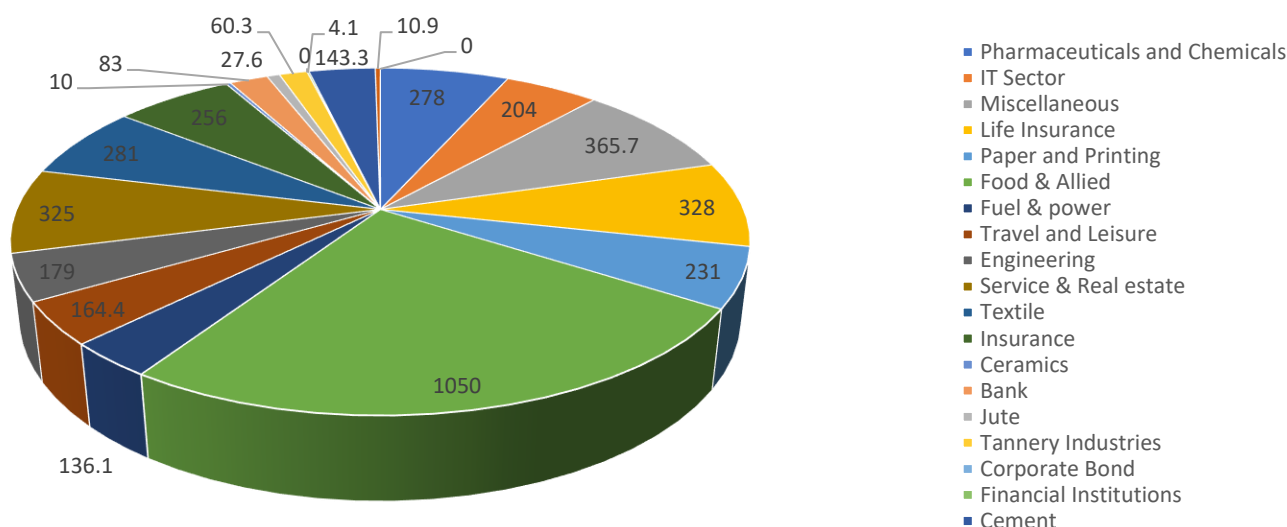
DSE Index Summary

Index	31-Aug-23	24-Aug-23	Point Change	% Change
DSEX	6299.50	6280.09	19.412	0.309%
DSES	1372.52	1365.74	6.786	0.497%
DSE30	2141.61	2130.50	11.113	0.522%

CSE Index Summary

Index	31-Aug-23	24-Aug-23	Point Change	% Change
CS50	1308.4922	1305.4662	3.026	0.232%
CS30	13390.564	13367.7865	22.778	0.170%
CSCX	11139.4458	11101.8851	37.561	0.338%

Sector wise weekly Turnover Change Contribution



Weekly Market Commentary

The DSEX indexed has increased by 0.309% and increased 19.412 points. The DSES index also showed Positive momentum and upped by 0.497%. However, we have seen a positive trend in DSE30 and it increased by 11.113 points. We have witnessed a positive trend in the 3 index in CSE. CS50 gain 3.026 points, CS30 index has gained 22.778 points and CSCX has gained 37.561 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	31-Aug-23	24-Aug-23	Point Change	% Change
DSMEX	1336.44389	1234.4714	101.97	0.0826

Index	Issues Advanced	Issues declined	Issues Unchanged
DSMEX	2	15	0

DSE	
Issues Advanced	87
Issues declined	67
Issues Unchanged	163

CSE	
Issues Advanced	146
Issues declined	40
Issues Unchanged	55
Issues Traded	55

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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	4488184162881.15
2. MUTUAL FUND	37460745454.04
3. DEBT SECURITIES	3234931470432.70
TOTAL	7760576378767.88

EHL: Dividend Declaration

The Board of Directors has recommended 25% Cash Dividend for the year ended June 30, 2023. Date of AGM: 18.10.2023, Time: 10:30 AM, Venue: Digital Platform through the link: <https://ehl.bdvirtualagm.com>. Record Date: 21.09.2023.

TOTAL TRANSACTIONS

A. NO. OF TRADES	105825
B. VOLUME(Nos.)	90722619
C. VALUE(Tk)	4561837396.70

Weekly Top Performer

Top 10 Gainer (Closing Price-All companies)		
Company	Close price	Change
DAFODILCOM	40.60	6.28%
FUWANGFOOD	107.50	6.23%
APEXTANRY	95.10	5.55%
EHL	6.50	4.84%
GENNEXT	779.70	2.46%
GEMINISEA	26.00	2.36%
INTECH	14.40	2.13%
SHURWID	48.90	2.09%
EASTERNINS	39.20	2.08%
NITOLINS	86.4	7.20%

Top 10 Loser (Closing Price-All companies)		
Instrument	Close price	% Change
RELIANCINS	70.00	-2.87%
OAL	11.70	-2.50%
JUTESPINN	329.90	-2.43%
CENTRALPHL	12.50	-2.34%
LEGACYFOOT	117.00	-2.34%
UNIONCAP	8.40	-2.33%
MIDASFIN	10.00	-1.96%
ARAMITCEM	26.60	-1.85%
PRIMELIFE	54.90	-1.79%
LIBRAINFU	831.70	-1.77%

Top 10 Companies by Value

Company	% change	Turnover Value in Tk.
FUWANGFOOD	6.28%	574.17
EHL	5.55%	321.64
RUPALILIFE	0.18%	209.59
SONALIPAPR	-0.98%	164.13
EMERALDOIL	1.60%	159.49
SEAPEARL	-0.44%	128.93
RDFOOD	2.05%	116.38
KBPPWBIL	1.43%	115.79
GEMINISEA	2.46%	105.88
INTRACO	0.24%	100

Market Parameter

Variables	30 Aug 2023	29 Aug 2023	Change
Market Annualized PE	7757.99	7757.81	0.00%
Turnover Velocity	18.96	18.96	0.00%
Market RSI (14 Days)	15.25%	15.58%	-0.33%
Market MFI (14 Days)	48.48	47.83	1.36%
Dividend Yield	53.06	45.59	16.39%
Market Cap (BDT Bn)	3.22%	3.22%	0.00%
Market Cap (USD bn)	70.85	70.85	0.00%
Market Cap to GDP Ratio	19.53%	19.53%	0.00%

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Currency Update- 31-08-2023

Currency	Buy	Sell
Saudi Riyal (SAR)	28.9264	29.1930
UAE Dirham (AED)	29.5391	29.8113
Kuwaiti Dinars (KWD)	352.1012	355.3464
US Dollar (USD)	108.5000	109.5000
EURO (EUR)	117.8378	118.9246
Pound sterling (GBP)	137.8012	139.0731
Japanese Yen (JPY)	0.7451	0.7520
Swiss franc (CHF)	123.6890	124.8290
Australian Dollar (AUD)	70.5243	71.1724
Canadian Dollar (CAD)	80.4663	81.2061
Swedish Krona (SEK)	9.9334	10.0249
Singapore Dollar (SGD)	80.4663	81.2061
Chinese Yuan (CNY)	14.9724	15.1099
Indian Rupee (INR)	1.3267	1.3271
Norwegian Krone (NOK)	10.2535	10.3480
Hong Kong Dollar (HKD)	13.8410	13.9685
Danish Krone (DKK)	15.8191	15.9649

SOURCE : STANDARD CHARTERED BANK

World Stock & Commodities

	31-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	614.1	91	7.05	68,477.24	8.82%	32
2	Cement	624.6	35.9	20.72	12,398.55	1.60%	6
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%	0
5	Debenture	0	0	0	9.84	0.00%	0
6	Engineering	4,087.00	57.46	88.72	53,099.13	6.84%	36
7	Financial Institutions	465.5	21.7	38.35	18,671.00	2.41%	11
8	Food & Allied	8,204.90	135.36	45	40,447.68	5.21%	23
9	Fuel & Power	4,526.30	186.68	19.58	45,497.21	5.86%	19
10	Insurance	2,307.00	120.67	18.68	17,446.34	2.25%	54
11	IT Sector	583.4	21.03	25.55	4,148.16	0.53%	10
12	Jute	540.7	1.76	307.2	394.92	0.05%	3
13	Miscellaneous	6,407.30	133.52	21.79	23,688.84	3.05%	17
14	Mutual Funds	3,190.70	287.88	18.68	4,684.00	0.60%	20
15	Paper & Printing	1,255.80	41.52	32.33	4,233.06	0.55%	6
16	Pharmaceuticals & Chemicals	13,049.40	440.16	32.64	72,720.15	9.37%	33
17	Services & Real Estate	226.5	10.12	31.03	2,806.28	0.36%	4
18	Tannery Industries	1,392.40	77.34	25.01	3,566.43	0.46%	7
19	Telecommunication	535.5	44.7	14.41	58,023.18	7.48%	3
20	Textile	1,860.90	62.01	30.33	17,203.82	2.22%	43
21	Travel & Leisure	246.2	16.26	14.63	4,622.77	0.60%	3
22	Treasury Bond	0	0	0	54,772.84	7.06%	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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