

WEEKLY MARKET REVIEW

Thursday, February 27, 2020

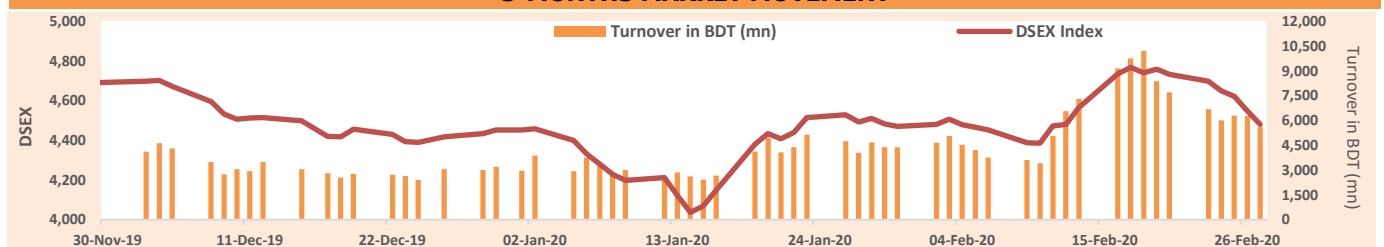
MARKET COMMENTARY

Indices of Dhaka Stocks Exchange observed a free-fall throughout the week and the prime index recorded a major setback of 252.91 points or 5.3 per cent at the end of the week. Investors amidst concerns over banking business due to the impact of the single-digit interest rate and GP's tussle with the regulator continued to dump their holdings which led the market fall in this week. Added to that, Banks' reluctance to form a special fund for stock market investment even after two weeks of the BB's declaration seemed to put investors in a doubt about a soon-to-be market recovery. Subsequently, trading activities remain low, and average turnover took a negative turn to BDT 6.17bn or by 6.35 per cent. Phama (17.9%) and Textile (16.1%) witnessed the highest interest from investors. All sectors generated negative return in this week, among them Jute (-12.4%), Ceramic (-8.4%) and Food (-7.7%) observed the highest correction at the end of this week. The port city's bourse, Chittagong Stock Exchange also registered loss this week. CSCX and CASPI declined by 479.3 and 781.8 points respectively.

DSE MARKET SUMMARY

| | This Week | Last Week | % Change | | This Week | Last Week | % Change |
|------|-----------|-----------|----------|------------------------|-----------|-----------|----------|
| DSEX | 4,480 | 4,733 | -5.3% | Avg. Turnover (BDT mn) | 6,175 | 6,593 | -6.35% |
| DS30 | 1,492 | 1,593 | -6.3% | Avg. Trade | 154,904 | 163,587 | -5.31% |
| DSES | 1,045 | 1,090 | -4.1% | Avg. Volume (mn) | 219 | 227 | -3.74% |

3-MONTHS MARKET MOVEMENT



WEEKLY TOP GAINERS

| Ticker | Price | Change** | P/E |
|------------|-------|----------|------|
| CENTRALPHL | 13.8 | 39.4% | 62.7 |
| VFSTDL | 30.4 | 23.1% | 14.6 |
| CVOPRL | 120.8 | 18.5% | n/a |
| FARCHEM | 11.2 | 17.9% | 15.6 |
| BEACONPHAR | 59.4 | 17.9% | 99.0 |
| BENGALWTL | 22.8 | 16.9% | 24.8 |
| SILVAPHL | 21 | 16.7% | 18.4 |
| NAHEEACP | 45.4 | 16.4% | 13.4 |
| OAL | 8 | 14.3% | n/a |
| INTRACO | 17.1 | 12.5% | 21.4 |

WEEKLY TOP LOSERS

| Ticker | Price | Change** | Forward P/E |
|------------|-------|----------|-------------|
| RINGSHINE | 8.1 | -46.0% | 4.2 |
| PRIMEINSUR | 19.4 | -25.1% | 45.1 |
| SAIHAMTEX | 33.3 | -22.9% | 29.2 |
| BRACBANK | 37.1 | -22.7% | 10.1 |
| NORTHERN | 373.9 | -19.1% | 18.5 |
| ILFSL | 3.9 | -17.0% | 26.6 |
| FASFIN | 4.3 | -15.7% | 21.5 |
| BSRMSTEEL | 40.0 | -15.4% | 44.4 |
| STANCERAM | 425.6 | -15.2% | n/a |
| VAMLRBBF | 5.2 | -11.9% | n/a |

WEEKLY TOP AVERAGE TURNOVER* (BDT mn)

| Ticker | Turnover | % Turnover | Price |
|------------|----------|------------|-------|
| GP | 231.3 | 3.98% | 274.4 |
| VFSTDL | 181.3 | 3.12% | 30.4 |
| ORIONPHARM | 152.6 | 2.63% | 44.3 |
| BRACBANK | 140.5 | 2.42% | 37.1 |
| IBP | 128.4 | 2.21% | 25.4 |
| ORIONINFU | 123.4 | 2.12% | 86.0 |
| LHBL | 111.4 | 1.92% | 44.1 |
| CONFIDCEM | 109.8 | 1.89% | 113.6 |
| GHAIL | 105.1 | 1.81% | 21.6 |
| SKTRIMS | 101.7 | 1.75% | 72.8 |

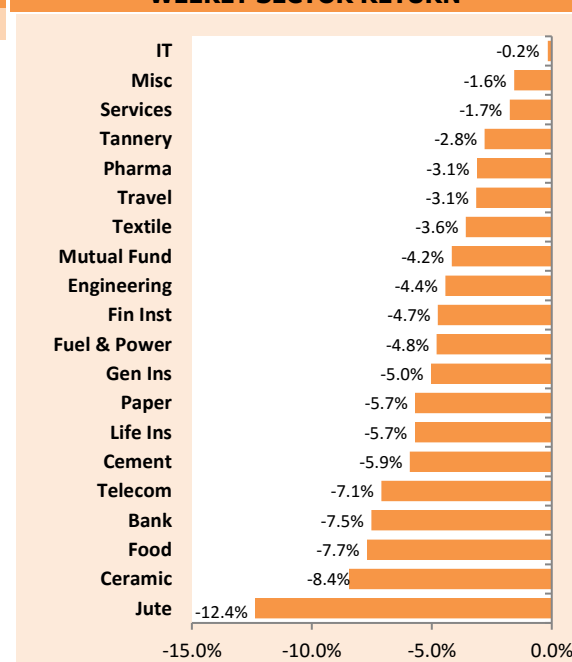
TOP MKT CAP (BDT)

| Ticker | Price | M. Cap (mn) | % M.Cap |
|-----------|--------|-------------|---------|
| GP | 274.4 | 370,522 | 12.90% |
| BATBC | 986.4 | 177,552 | 6.18% |
| SQRPHARMA | 193.4 | 163,276 | 5.69% |
| UPGDCL | 252.2 | 132,908 | 4.63% |
| RENATA | 1089.7 | 96,536 | 3.36% |
| BERGERPBL | 1406.5 | 65,230 | 2.27% |
| ICB | 80.2 | 61,549 | 2.14% |
| MARICO | 1630.8 | 51,370 | 1.79% |
| LHBL | 44.1 | 51,217 | 1.78% |
| BRACBANK | 37.1 | 45,609 | 1.59% |

WEEKLY SECTOR MOVEMENT

| Sector | Return | Turnover (mn) | M.Cap (mn) | % Turnover | % of M.Cap | P/E |
|------------------------|--------|---------------|------------|------------|------------|------|
| Bank | -7.5% | 360.1 | 482,776 | 6.2% | 16.8% | 7.3 |
| Cement | -5.9% | 230.3 | 86,658 | 4.0% | 3.0% | 33.1 |
| Ceramics | -8.4% | 63.9 | 21,931 | 1.1% | 0.8% | 23.4 |
| Engineering | -4.4% | 842.7 | 158,554 | 14.5% | 5.5% | 17.8 |
| Financial Institutions | -4.7% | 109.8 | 143,469 | 1.9% | 5.0% | 22.5 |
| Food & Allied | -7.7% | 302.6 | 231,709 | 5.2% | 8.1% | 18.9 |
| Fuel & Power | -4.8% | 489.9 | 411,982 | 8.4% | 14.3% | 11.2 |
| General Insurance | -5.0% | 177.9 | 51,520 | 3.1% | 1.8% | 12.8 |
| IT | -0.2% | 121.3 | 20,026 | 2.1% | 0.7% | 18.8 |
| Jute | -12.4% | 46.6 | 1,945 | 0.8% | 0.1% | 39.5 |
| Life Insurance | -5.7% | 93.2 | 56,778 | 1.6% | 2.0% | n/a |
| Miscellaneous | -1.6% | 302.0 | 103,428 | 5.2% | 3.6% | 22.2 |
| Mutual Fund | -4.2% | 107.8 | 31,399 | 1.9% | 1.1% | n/a |
| Paper & Printing | -5.7% | 79.8 | 12,696 | 1.4% | 0.4% | 36.1 |
| Pharma. & Chemicals | -3.1% | 1,038.7 | 492,573 | 17.9% | 17.2% | 15.4 |
| Services & Real Estate | -1.7% | 38.9 | 16,267 | 0.7% | 0.6% | 13.6 |
| Tannery | -2.8% | 103.2 | 20,385 | 1.8% | 0.7% | 22.6 |
| Telecommunication | -7.1% | 269.4 | 386,568 | 4.6% | 13.5% | 11.0 |
| Textile | -3.6% | 938.4 | 116,021 | 16.1% | 4.0% | 11.7 |
| Travel & Leisure | -3.1% | 97.5 | 24,719 | 1.7% | 0.9% | 23.3 |

WEEKLY SECTOR RETURN



AVERAGE TURNOVER DISTRIBUTION

