Alliance Capital Asset Management Limited

Daily Market Review
17-Oct-21

Market Statistics

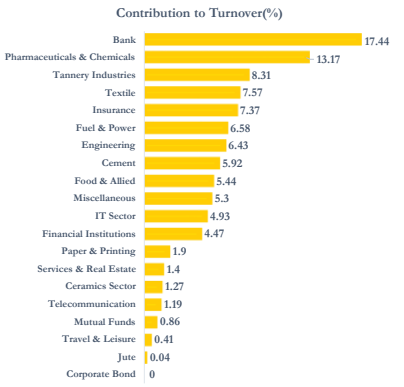
Particulars	Today	Yesterday	Change	Δ Point	Movers & Shakers	
DSEX Index	7,186.46	7,243.27	-0.78%	-56.80	Issues Advanced	65
DSES Index	1,546.32	1,567.44	-1.35%	-21.12	Issues Declined	287
DS30 Index	2,705.14	2,719.14	-0.51%	-14.00	Issues Unchanged	24
Market Cap(BDT Mn)	5,773,599.65	5,801,128.10	-0.47%	-27528.46	Total Issue Traded	376
Turnover (BDT Mn)	16,553.78	14,338.78	15.45%	2215.00		

Market Mover	Closing Price	YCP	Value (BDT Mn)
FORTUNE	108.50	99.50	1,346.39
IFIC	18.70	17.80	1,169.51
ORIONPHARM	104.20	115.20	1,033.41
LHBL	89.70	95.90	908.54
NRBCBANK	34.20	31.60	799.14
BATBC	746.90	719.80	714.58
DELTALIFE	199.50	193.20	692.27
GENEXIL	140.30	137.10	661.04
BEXIMCO	144.00	139.60	645.38
SONALIPAPR	554.50	517.70	277.36

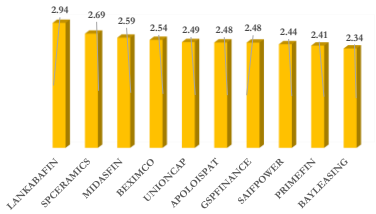
Top Gainers	Closing Price	YCP	Change %
SBACBANK	21.00	19.10	9.95
FORTUNE	108.50	99.50	9.05
NRBCBANK	34.20	31.60	8.23
SONALIPAPR	554.50	517.70	7.11
SHURWID	18.90	17.70	6.78
IFIC	18.70	17.80	5.06
PRIMELIFE	67.20	64.60	4.02
BATBC	746.90	719.80	3.76
ALARABANK	27.10	26.20	3.44
ABBANK	15.20	14.70	3.40

Top Losers	Closing Price	YCP	Change %
ORIONPHARM	104.20	115.20	-9.55
IBP	22.60	24.80	-8.87
IMAMBUTTON	27.00	29.50	-8.47
PAPERPROC	144.40	157.00	-8.03
FEKDIL	20.10	21.80	-7.80
ADVENT	31.20	33.80	-7.69
ORIONINFU	92.70	100.00	-7.30
GPHISPAT	63.80	68.80	-7.27
FUWANGCER	19.40	20.90	-7.18
GBBPOWER	39.30	42.30	-7.09

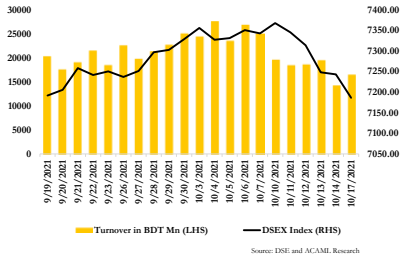
Sector Performance



Today's Market Beta (Top Ten)



Monthly Market Movement



Source: DSE and ACAML Research

Market Commentary

DSEX, the prime index of the Dhaka Stock Exchange (DSE) extended its losing streak, declining 0.78 % to settle at 7,186.46. The DS30 index, comprising blue chips, lost by 14 points to stand at 2,705.14 and DSE Shariah index fell 21.12 points, eventually reaching 1,546.32. Aggressive profit booking resulting from stocks which were recent sector outperformers attributed to the decline of the DSEX.

Turnover, an integral metric for gauging overall market outlook, stood at BDT. 16,553.78 million on DSE, increasing 15.45 % to reflect a growth in investor participation.

FORTUNE secured the top position in the turnover list with shares worth BDT 1,346.39 million changing hands, which was followed by IFIC, ORIONPHARM and LHBL.

While SBACBANK led the gainer's list, illustrating an increase of 9.95 per cent, ORIONPHARM was the worst performer, what with losing around 9.55 per cent. in relation to its previous closing price.

In the sectoral font, a major portion of investor activity revolved around the Banks which occupied around 17.44 % of turnover distribution and outperformed the other sectors followed by Pharmaceuticals & Chemicals and Tanneries.

UPCOMING IPOs

Name	Issue Manager	Method	IPO Size(BDT Mn)
Union Bank	Prime Bank and BRAC EPL	fixed-price	4280
BD Thai Food & Beverage	BLI Capital and Unicap Investment	fixed-price	150

ACAML Managed Fund Details

Fund Name	MTB Unit Fund
Fund Nature	Open Ended Fund
Sponsor	Mutual Trust Bank Limited
Trustee	Bangladesh General Insurance Co. Ltd.
Custodian	BRAC Bank
NAV Per Unit	11.01
Sale Price	10.50
Repurchase Price	10.00

ACAML Managed Fund Details

Name	Alliance Sandhani Life Unit Fund
Fund Nature	Open Ended Fund
Sponsor	Sandhani Life Insurance Company Limited
Trustee	Bangladesh General Insurance Co. Ltd.
Custodian	BRAC Bank
NAV Per Unit	9.85
Sale Price Per Unit	9.70
Repurchase Price	9.25

Block Transactions

Ticker	Trade	Quantity	Val (BDT mn)
SILVAPHL	1	25,000	0.65
IFIC	1	33,500	0.60
BAYLEASING	2	78,500	2.51
BNICL	1	81,000	10.94
SALVOCHEM	3	120,000	6.01
SPCL	2	246,000	31.79
FORTUNE	6	418,801	41.96
ALIF	1	450,000	8.61
PHOENIXFIN	5	514,000	16.70
ALARABANK	1	2,225,000	55.63

Sectoral P/E

IT Sector	71.79
Bank	41.38
Textile	69.06
Pharmaceuticals & Chemicals	45.58
Engineering	30.11
Insurance	109.35
Miscellaneous	38.20
Food & Allied	47.99
Fuel & Power	45.40
Tannery Industries	44.88
Cement	58.11
Financial Institutions	391.90
Travel & Leisure	337.06
Telecommunications	14.92
Services & Real Estate	79.62
Ceramics	265.74
Market	38.06

Source: AmarStock, Stock Bangladesh and ACAML Research

Exchange Rate (In BDT)

Currency	Buying	Selling
USD	85.65	85.65
GBP	117.76	117.80
EUR	99.35	99.39

Today's World Stock Indices

Index	Today	Yesterday	%Change
S&P 500	4,471.370	4,363.800	2.47%
FTSE 100	7,234.03	7,192.98	0.57%
NIKKEI 225	29,068.63	28,550.93	1.81%

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