Alliance Capital Asset Management Limited

Daily Market Review

29-Sep-21

Market Statistics

Particulars	Today	Yesterday	Change	Δ Point	Movers & Shakers	
DSEX Index	7,302.86	7,297.24	0.08%	5.61	Issues Advanced	115
DSES Index	1,583.66	1,585.29	-0.10%	-1.63	Issues Declined	223
DS30 Index	2,696.88	2,691.82	0.19%	5.05	Issues Unchanged	38
Market Cap(BDT Mn)	5,769,129.60	5,769,129.60	0.00%	0.00	Total Issue Traded	376
Turnover (BDT Mn)	22,694.62	21,357.34	6.26%	1337.28		

Market Mover	Closing Price	YCP	Value (BDT Mn)
LHBL	88.30	85.50	2,046.82
BEXIMCO	137.00	137.90	1,165.58
ORIONPHARM	90.70	87.60	1,017.15
LANKABAFIN	44.00	43.40	508.58
DSSL	23.30	21.90	421.31
SPCL	124.00	126.20	404.38
BXPHARMA	235.80	237.60	392.73
PTL	73.00	69.70	372.34
DELTALIFE	181.00	174.20	361.19
SAIFPOWER	42.70	41.90	330.57

Top Gainers	Closing Price	YCP	Change %
SEAPEARL	47.90	43.80	9.36
UNIQUEHRL	58.90	54.70	7.68
ICB	150.80	141.00	6.95
PRIMEFIN	18.30	17.20	6.40
DSSL	23.30	21.90	6.39
AMANFEED	68.00	64.30	5.75
ACMELAB	101.50	96.30	5.40
BDTHAI	29.00	27.60	5.07
SKTRIMS	43.00	41.00	4.88
PTL	73.00	69.70	4.73

Top Losers	Closing Price	YCP	Change %
SAVAREFR	231.70	245.50	-5.62
MONOSPOOL	164.00	172.60	-4.98
RENWICKJA	1196.50	1258.50	-4.93
BNICL	152.70	159.90	-4.50
DSHGARME	238.30	249.40	-4.45
EASTERNINS	158.20	164.80	-4.00
ETL	14.50	15.10	-3.97
PAPERPROC	165.40	172.20	-3.95
BPPL	48.10	50.00	-3.80
EMERALDOIL	38.90	40.40	-3.71

Block Transactions

Ticker	Trade	Quantity	Val (BDT mn)
BDFINANCE	2	1,400,000	96.40
CITYBANK	1	581,166	18.42
GENEXIL	2	505,370	60.68
BSCCL	4	312,000	71.76
NHFIL	4	257,500	22.41
PENINSULA	4	767,000	25.69
PTL	19	808,499	56.83
SPCL	2	260,000	33.15
LANKABAFIN	2	300,000	12.84
BAYLEASING	2	250,000	8.75

Exchange Rate

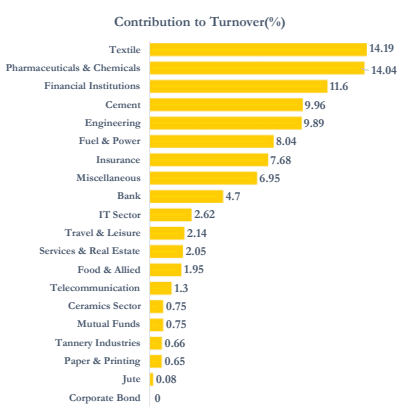
(In BDT)

Currency	Buying	Selling
USD	85.48	85.48
GBP	115.65	115.75
EUR	99.81	99.91

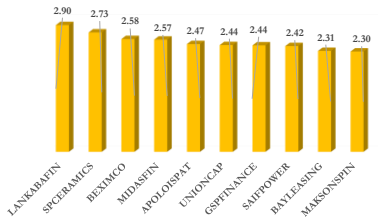
Today's World Stock Indices

Index	Today	Yesterday	%Change
S&P 500	4,352.630	4,443.110	-2.04%
FTSE 100	7,088.25	7,039.55	0.69%
NIKKEI 225	29,544.29	30,183.96	-2.12%

Sector Performance



Today's Market Beta (Top Ten)

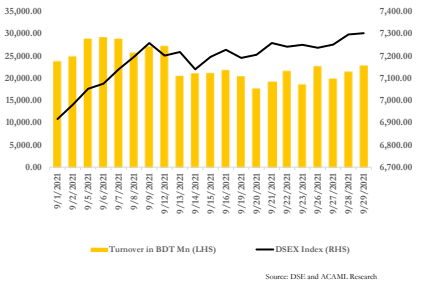


Sectoral P/E

IT Sector	31.59
Bank	7.78
Textile	50.09
Pharmaceuticals & Chemicals	21.63
Engineering	16.90
Insurance	22.47
Miscellaneous	35.77
Food & Allied	37.11
Fuel & Power	13.36
Tannery Industries	145.58
Cement	30.90
Financial Institutions	120.66
Travel & Leisure	400.74
Paper & Printing	49.76
Telecommunications	14.76
Services & Real Estate	34.53
Ceramics	35.94
Jute	-40.81
Market	**17.24**

Source: AmarStock, Stock Bangladesh and ACAML Research

Monthly Market Movement



Source: DSE and ACAML Research

Market Commentary

DSEX, the prime index of the Dhaka Stock Exchange (DSE) continued to show a winning streak rising 0.08% to settle at 7,302.86. The DS30 index, comprising blue chips, gained by 5.05 points to stand at 2,696.88 and DSE Shariah index shed 1.63 points, eventually reaching 1,583.66. Investors taking positions in sector wise large cap issues ahead of earnings and dividends declarations caused the indices to increase.

Turnover, an integral metric for gauging overall market outlook, stood at BDT. 22,694.62 million on DSE, rising by 6.26% to reflect active investor participation.

LHBL stood at the top position in the turnover list with shares worth BDT. 2,046.82 million changing hands, which was followed by BEXIMCO, ORIONPHARM and LANKABAFIN.

While SEAPEARL led the gainer's list, illustrating an increase of 9.36 per cent, SAVAREFR was the worst performer, what with losing around 5.62 per cent. in relation to its previous closing price.

In the sectoral font, a major portion of investor activity revolved around the textiles which occupied around 14.19 % of turnover distribution and outperformed the other sectors followed by pharmaceuticals and Chemicals and Financial Institutions.

UPCOMING IPOs

Name	Issue Manager	Method	IPO Size(BDT Mn)	Offer Price
Sena Kalyan Insurance	AAA Finance & Investment	fixed-price	160	Tk 10
Union Bank	Prime Bank and BRAC EPL	fixed-price	4280	Tk 10

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	10.53
Sale Price	10.30
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	9.61
Sale Price Per Unit	9.50
Repurchase Price	9.30

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