Alliance Capital Asset Management Limited

Daily Market Review

28-Sep-21

Market Statistics

Particulars	Today	Yesterday	Change	Δ Point	Movers & Shakers	
DSEX Index	7,297.24	7,251.71	0.63%	45.53	Issues Advanced	164
DSES Index	1,585.29	1,578.77	0.41%	6.52	Issues Declined	172
DS30 Index	2,691.82	2,676.24	0.58%	15.58	Issues Unchanged	39
Market Cap(BDT Mn)	5,769,129.60	5,769,129.60	0.00%	0.00	Total Issue Traded	375
Turnover (BDT Mn)	21,357.34	19,808.73	7.82%	1548.62		

Market Mover	Closing Price	YCP	Value (BDT Mn)
ORIONPHARM	87.60	85.50	1,170.06
LHBL	85.50	82.20	1,112.37
BEXIMCO	137.90	137.70	1,092.58
SPCL	126.20	119.90	699.12
SAIFPOWER	41.90	39.60	594.67
BXPHARMA	237.60	238.80	487.49
GPHISPAT	60.30	59.70	429.99
ACTIVEFINE	30.60	29.80	376.15
BBSCABLES	77.40	76.20	356.33
MAKSONSPIN	34.70	32.90	341.08

Top Gainers	Closing Price	YCP	Change %
DESHBANDHU	23.80	21.90	8.68
PDL	19.20	17.80	7.87
SAIHAMTEX	25.30	23.50	7.66
ETL	15.10	14.10	7.09
SAPORTL	31.30	29.30	6.83
DSHGARME	249.40	233.60	6.76
SIMTEX	23.20	21.80	6.42
EASTERNINS	164.80	155.30	6.12
FIRSTSBANK	12.20	11.50	6.09
SAIFPOWER	41.90	39.60	5.81

Top Losers	Closing Price	YCP	Change %
MONNOCERA	151.70	159.90	-5.13
MONNOAGML	743.70	775.50	-4.10
TUNGHAI	7.10	7.40	-4.05
DOMINAGE	36.10	37.50	-3.73
KOHINOOR	459.50	477.30	-3.73
CVOPRL	222.30	230.50	-3.56
RAHIMTEXT	302.30	313.00	-3.42
ZEALBANGLA	142.40	147.00	-3.13
KPPL	15.80	16.30	-3.07
MITHUNKNIT	19.00	19.60	-3.06

Block Transactions

Ticker	Trade	Quantity	Val (BDT mn)
BEXIMCO	3	106,000	13.85
GBBPOWER	2	121,000	5.63
ALIF	2	140,000	2.84
DELTALIFE	2	154,000	26.90
PRIMEFIN	1	189,431	3.18
SQURPHARMA	1	200,000	49.80
PTL	5	225,000	17.20
SALAMCRST	1	300,000	11.40
SPCL	1	339,490	41.48
ORIONPHARM	7	340,521	28.63

Exchange Rate

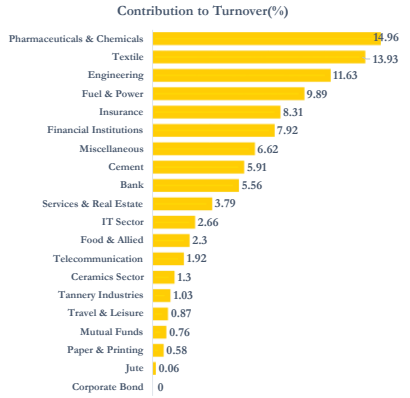
(In BDT)

Currency	Buying	Selling
USD	85.35	85.35
GBP	116.89	116.94
EUR	99.81	99.84

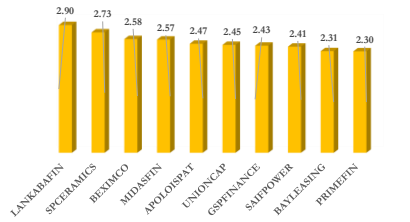
Today's World Stock Indices

Index	Today	Yesterday	%Change
S&P 500	4,443.110	4,455.480	-0.28%
FTSE 100	7,039.55	7,079.34	-0.56%
NIKKEI 225	30,183.96	30,240.06	-0.19%

Sector Performance



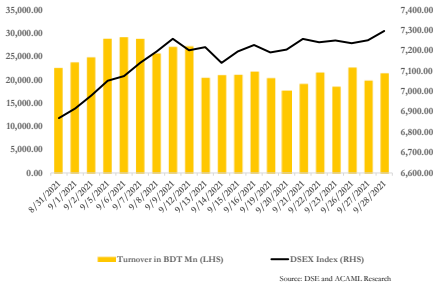
Today's Market Beta (Top Ten)



Sectoral P/E	
IT Sector	31.81
Bank	7.81
Textile	49.74
Pharmaceuticals & Chemicals	21.21
Engineering	16.93
Insurance	22.65
Miscellaneous	35.81
Food & Allied	37.15
Fuel & Power	13.31
Tannery Industries	147.51
Cement	30.20
Financial Institutions	116.64
Travel & Leisure	373.85
Paper & Printing	50.05
Telecommunications	14.82
Services & Real Estate	34.47
Ceramics	36.34
Jute	-41.43
Market	**17.15**

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 an upward trend rising 0.63% to settle at 7,297.24. The DS30 index, comprising blue chips, gained by 15.58 points to stand at 2,691.82 and DSE Shariah index gained 6.52 points, eventually reaching 1,585.29. 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. 21,357.34 million on DSE, rising by 7.82% to reflect active investor participation.
ORIONPHARM stood at the top position in the turnover list with shares worth BDT. 1,170.06 million changing hands, which was followed by LHBL, BEXIMCO and SPCL. While DESHBANDHU led the gainer's list, illustrating an increase of 8.68 per cent, MONNOCERA was the worst performer, what with losing around 5.13 per cent. in relation to its previous closing price.
In the sectoral font, a major portion of investor activity revolved around the pharmaceuticals and chemicals which occupied around 14.96 % of turnover distribution and continued to outperform the other sectors followed by textile and engineering.

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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