



AT CAPITAL DAILY MARKET UPDATE – August 19, 2015

Overview

The DSEX closed at 4809.3 points, up by 41.3 points. The total transaction was worth BDT 5.3 bn.

Price of 158 issues appreciated whereas 115 issues declined and 45 others remained unchanged.

Index Movements:

INDEX	VALUE	DAY CH(%)	MTD(%)	YTD(%)
DSEX	4,817.0	+0.2%	+0.5%	(1.0%)
DSES	1,188.3	+0.3%	(0.1%)	+3.3%
DS30	1,849.4	+0.4%	(1.8%)	+2.6%

MARKET STAT		TODAY	LAST DAY	CHANGE(%)
MARKET CAP (Equity)	BDT MM	2,749,966.1	2,748,866.6	+0.0%
	USD MM	35,278.6	35,264.5	+0.0%
TURNOVER	BDT MM	5,502.0	5,285.8	+4.1%
	USD MM	70.6	67.8	+4.1%
VOLUME	MILLION SHARES	142.6	145.4	(1.9%)

Market Commentary:

Market ended green for the second day after a volatile trading session. The premier benchmark index, DSEX, opened positive for an hour then started losing momentum but recovered at last hour. The major bourse closed at 4817.0 which is 0.2% higher than the last trading session. Turnover stood at BDT 5.5 bn which is 4.1% higher than the last trading day.

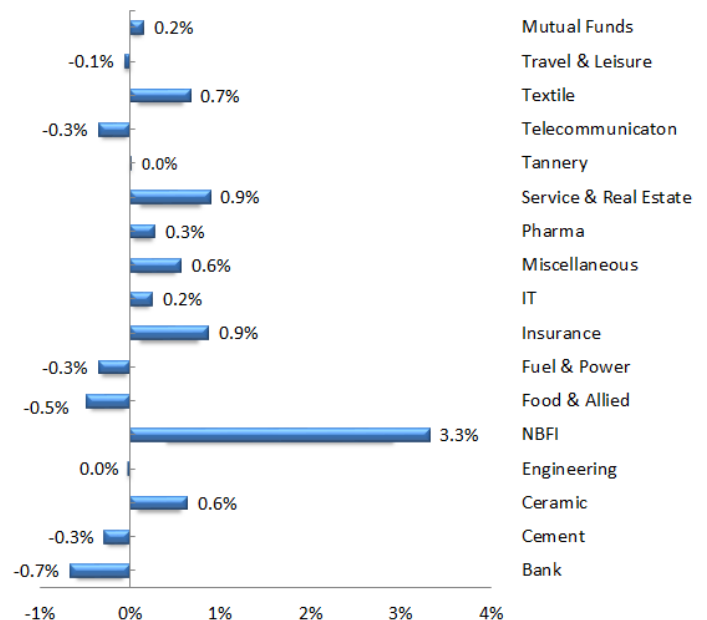
Among the prominent sectors NBFI, Insurance, and Textile outperformed the market while the rest underperformed. Banking sectors seems to lose market interest as the sector's required provision is in shortfall according to a major daily today.

Square Pharmaceuticals (SQURPHARMA) was the daily turnover leader contributing 4.4% to the total turnover.

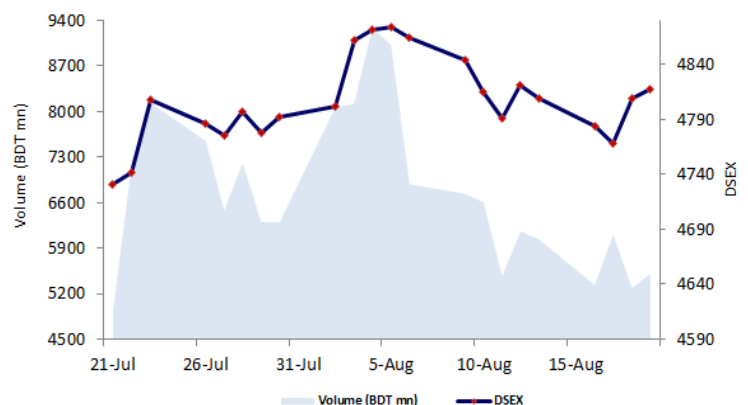
TOP 10 GAINERS			TOP 10 LOSERS		
TRADING CODE	CLOSEP	%CHANGE	TRADING CODE	CLOSEP	%CHANGE
APEXSPINN	90	+9.9%	EASTRN LUB	372.3	(6.9%)
MONNOCERA	42.3	+9.9%	SUNLIFEINS	28.4	(5.6%)
BDAUTOCA	27.2	+9.7%	PURABIGEN	15.5	(5.5%)
IBNSINA	132.1	+9.5%	AL-HAJTEX	126.1	(4.8%)
NPOLYMAR	113.1	+7.9%	PREMIERLEA	8.8	(4.3%)
NFML	25.2	+7.7%	AIBL1STIMF	4.7	(4.1%)
QSMDRYCELL	73.1	+7.3%	MEGHNA PET	5.4	(3.6%)
RAHIMTEXT	298.2	+6.9%	SANDHANINS	41.2	(3.3%)
MIRACLEIND	17	+6.9%	PIONEERINS	34.2	(3.1%)
STANCERAM	46.4	+6.7%	GLAXOSMITH	2105	(3.1%)

** Top Loser List not adjusted for Right/stock dividend post record

Sector Movement in DSE (August 19 - August 18)



Last 1 Month DSEX





News:

Banks suffer huge provision shortfall

The country's banking sector experienced a provision shortfall of Tk2,472 crore in June, which was required to maintain against the default loans.

Though the shortfall amount was decreased by over Tk1,300 crore in April-June quarter compared to Tk3,778 crore in the previous January-March quarter.

"A slight fall in bad loans mainly accounted for the lower provision requirement that led the shortfall to go down during the second quarter of this year," a senior executive of Bangladesh Bank yesterday.

<http://www.dhakatribune.com/business/2015/aug/19/banks-suffer-huge-provision-shortfall#sthash.QerlmhTP.dpuf>

ECNEC okays six projects of Tk4,000cr

The Executive Committee of the National Economic Council approved six development projects related to improving seed quality, river dredging and communication.

The cost of the projects has been estimated at a total of Tk3,962 crore. Of the amount, the government will provide Tk3,814 crore from public exchequer while the respective agencies will bear Tk147 crore from their own funds. Among the projects, four are new and two are revised.

<http://www.dhakatribune.com/business/2015/aug/19/ecnec-okays-six-projects-tk4000cr#sthash.iLoEsRXU.dpuf>

Four in five households have access to financial services

Study by Institute of Microfinance releases findings

Four in five households in Bangladesh have access to financial services, thanks to improvements in the networks of banks and microfinance institutions as well as a booming mobile banking segment, according to a new study. Access to financial services, including insurance, stood at over 79 percent in 2014, compared to 77 percent in 2010, the study by Institute of Microfinance (InM), a microcredit think-tank, showed.

Barisal division, at 89.74 percent, has the highest percentage of households with access to finance, followed by Khulna with 85.44 percent, Rangpur 84.19 percent, Rajshahi 83.63 percent, Chittagong 75.62 percent, Dhaka 74.02 percent and Sylhet 73.87 percent.

<http://www.thefinancialexpress-bd.com/2015/08/18/104381>