



AT CAPITAL DAILY MARKET UPDATE – August 24, 2015

Overview

The DSEX closed at 4794.0 points, down by 37.7 points. The total transaction was worth BDT 4.0 bn.

Price of 68 issues appreciated whereas 211 issues declined and 40 others remained unchanged.

Index Movements:

INDEX	VALUE	DAY CH(%)	MTD(%)	YTD(%)
DSEX	4,794.0	(0.8%)	+ 0.0%	(1.5%)
DSES	1,178.0	(0.6%)	(1.0%)	+ 2.4%
DS30	1,832.1	(0.7%)	(2.8%)	+ 1.6%

MARKET STAT		TODAY	LAST DAY	CHANGE(%)
MARKET CAP (Equity)	BDT MM	2,735,926.7	2,754,550.2	(0.7%)
	USD MM	35,098.5	35,337.4	(0.7%)
TURNOVER	BDT MM	3,993.5	4,677.3	(14.6%)
	USD MM	51.2	60.0	(14.6%)
VOLUME	MILLION SHARES	103.1	127.2	(19.0%)

Market Commentary:

Despite a hint given by the Finance Minister that a cut in fuel-oil prices on the domestic market is likely within a fortnight amid a global slump in petroleum prices, Market continued its losing streak, with a further decrease in investor participation. The premier benchmark index, DSEX, opened negative and continued to fall steadily throughout the rest of the day. The major bourse closed at 4794.0 which is 0.7% lower than the last trading session. Turnover stood at BDT 4.0 bn which is 14.6% lower than the last trading day.

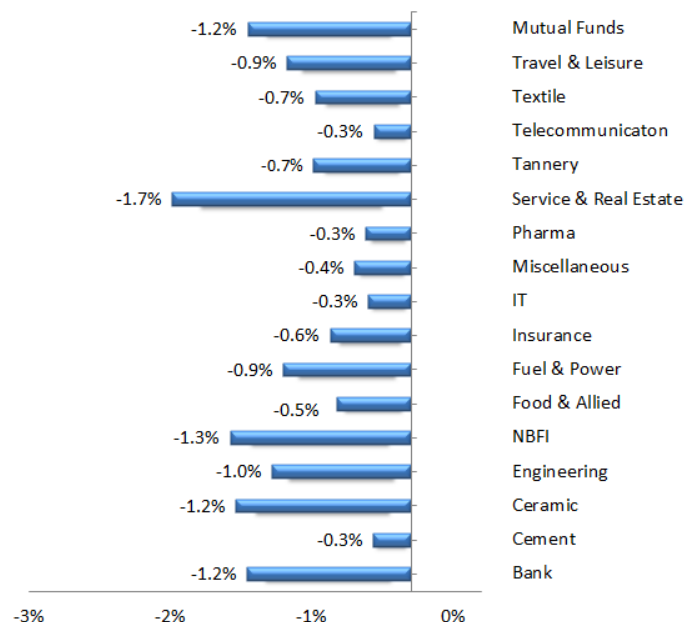
Among the prominent sectors Cement, Telecommunication, Pharma, Food & Allied, Insurance, Tannery and Textile outperformed the market while the rest underperformed. The central bank released the figure for core inflation in July, which stood at 7.37%, a 0.63% increase from the figure last month, causing investors to refrain from making fresh investments.

Shahjibazar Power Co. (SPCL) was the daily turnover leader contributing 6.2% to the total turnover.

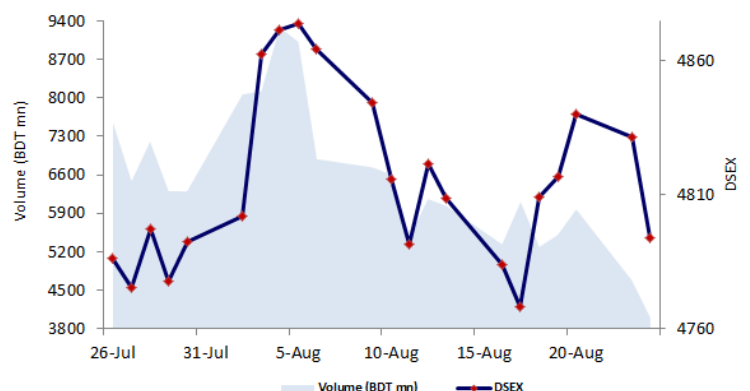
TOP 10 GAINERS			TOP 10 LOSERS		
TRADING CODE	CLOSEP	%CHANGE	TRADING CODE	CLOSEP	%CHANGE
ZEALBANGLA	6.9	+ 9.5%	NORTHERN	322.6	(8.2%)
MODERN DYE	77.9	+ 3.9%	APEXFOODS	159.4	(7.5%)
NFML	25.2	+ 3.3%	FBFIF	7.2	(6.5%)
SHASHADNIM	44	+ 2.8%	PRIME1ICBA	5	(5.7%)
QSM DRYCELL	74.1	+ 2.8%	ICBIBANK	4.4	(4.3%)
MEGCONMILK	7.7	+ 2.7%	APEXSPINN	80.4	(4.1%)
IBNSINA	131.6	+ 2.5%	UNIONCAP	13.8	(3.5%)
BSC	400.7	+ 2.5%	PREMIERLEA	8.5	(3.4%)
NCCBLMF1	4.3	+ 2.4%	WATACHEM	170.6	(3.4%)
MBL1STMF	4.4	+ 2.3%	IFIC	23	(3.4%)

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

Sector Movement in DSE (August 24 - August 23)



Last 1 Month DSEX





News:

Cut in fuel-oil prices in 2 weeks: Muhith World oil prices now plummet to new low

Finance Minister AMA Muhith hinted Sunday that a cut in fuel-oil prices on the domestic market was likely within a fortnight amid a global slump in petroleum prices.

"I am yet to fix the new price. I have asked the Power Division officials to prepare documents for meeting (on revising petroleum price)," he told newsmen. The finance minister made the observations after his meeting with visiting British state minister for international development Desmond Angus Swayne at his secretariat office.

He said the change would be brought before he leaves for the USA to attend a meeting of the International Monetary Fund (IMF). He may leave Dhaka on September 23.

<http://www.thefinancialexpress-bd.com/2015/08/24/105147>

Core inflation keeps on rising in recent months BB goes on alert

The central bank bolstered monitoring of the key economic indicator as core inflation kept rising in recent months, climbing to 7.37 per cent in July, officials said. A month before, in June, the rate of inflation was 6.74 per cent. And it was 6.37 per cent in May.

The Bangladesh Bank's latest statistics revealed the incremental rise in the core inflation that prompted the BB authorities to go on alert about the situation. Currently, the BB is measuring the core inflation that excludes non-food and non-fuel components from consumer price index (CPI).

The prime objective of computing core inflation is to separate out the components of headline inflation, officially known as general inflation, which is caused by non-monetary events as these price changes do not reflect the impact of underlying monetary policy decisions.

<http://www.thefinancialexpress-bd.com/2015/08/24/105148>

August 21 attack: BNP denies PM's accusation

BNP yesterday refuted prime minister's claim that Khaleda Zia and her son Tarique Rahman were involved in the August 21 grenade attack.

The party's International Affairs Secretary Asaduzzaman Ripon said it was very painful and also a cause of concern.

"We want to tell the prime minister that a quarter may be trying to mislead her by giving such false information. Our party does not believe in the politics of killing," he told a press briefing at the Nayapaltan office.

<http://www.dhakatribune.com/politics/2015/aug/24/august-21-attack-bnp-denies-pms-accusation#sthash.LKSUipJZ.dpuf>