



AT CAPITAL DAILY MARKET UPDATE – December 10, 2015

Overview

The DSEX closed at 4583.4 points, down by 3.9 points. The total transaction was worth BDT 3.7 bn.

Price of 135 issues appreciated whereas 141 issues declined and 46 others remained unchanged.

Index Movements:

| INDEX | VALUE | DAY CH(%) | MTD(%) | YTD(%) |
|-------|---------|-----------|--------|--------|
| DSEX | 4,583.4 | (0.1%) | + 0.1% | (5.8%) |
| DSES | 1,105.4 | + 0.1% | + 0.3% | (3.9%) |
| DS30 | 1,741.1 | (0.2%) | + 0.4% | (3.4%) |

| MARKET STAT | | TODAY | LAST DAY | CHANGE(%) |
|---------------------|----------------|-------------|-------------|-----------|
| MARKET CAP (Equity) | BDT MM | 2,542,394.7 | 2,544,397.4 | (0.1%) |
| | USD MM | 32,370.7 | 32,396.2 | (0.1%) |
| TURNOVER | BDT MM | 3,743.5 | 3,814.1 | (1.9%) |
| | USD MM | 47.7 | 48.6 | (1.9%) |
| VOLUME | MILLION SHARES | 92.6 | 96.1 | (3.6%) |

Market Commentary:

Market ended flat as investors kept themselves refrain from making fresh investment. The premier benchmark index, DSEX opened in positive mode and increased by 11 points within first 20 minutes but then sharp sell pressure emerged which eroded out the initial gain and dragged the index at 4572 level. Then market tried to show some resiliency but failed to stay positive. After whole day of up and down, eventually index closed at 4583.4 which is 3.9 points lower than last trading session. Turnover stood at BDT 3.7bn which is 1.9% lower than the last trading session.

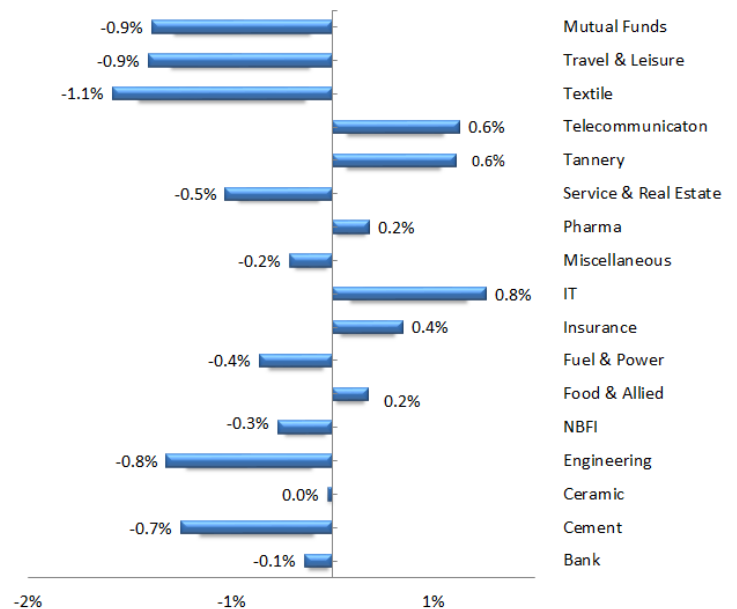
Among the prominent sectors Telecommunication, Insurance, Food& Allied and Pharma outperformed the market while the rest underperformed.

BXPHERMA was the daily turnover leader contributing 3.5% to the total turnover.

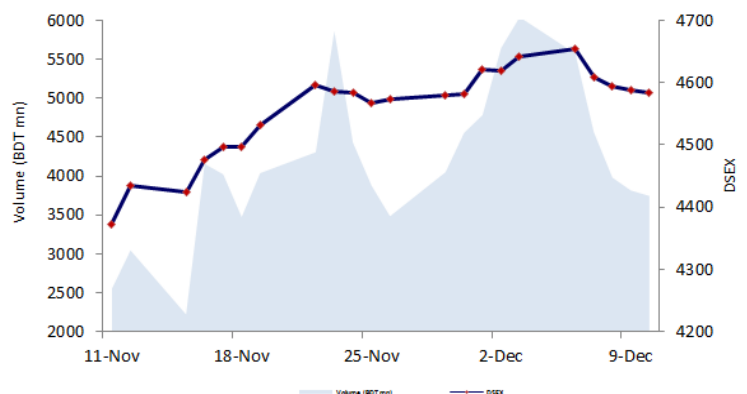
| TOP 10 GAINERS | | | TOP 10 LOSERS | | |
|----------------|--------|---------|---------------|--------|---------|
| TRADING CODE | CLOSEP | %CHANGE | TRADING CODE | CLOSEP | %CHANGE |
| GQBALLPEN | 73.6 | + 9.7% | ENVOYTEX | 44.1 | (7.7%) |
| AL-HAJTEX | 107.8 | + 9.7% | PROGRESLIF | 58 | (7.3%) |
| SAMATALETH | 25.6 | + 8.0% | RUPALIBANK | 32.1 | (6.7%) |
| AZIZPIPES | 39.3 | + 6.5% | FBFIF | 5.8 | (6.5%) |
| RUPALILIFE | 34.9 | + 6.1% | BIFC | 10.7 | (6.1%) |
| STANCERAM | 51.5 | + 4.5% | TOSRIFA | 18.8 | (5.5%) |
| JUTESPINN | 51.5 | + 4.5% | FEKDIL | 17.1 | (5.5%) |
| BSCCL | 110.4 | + 4.3% | PRAGATIINS | 25 | (5.3%) |
| MEGHNALIFE | 58.9 | + 4.2% | NORTHRNINS | 17.6 | (4.3%) |
| 1STPRIMFMF | 10.6 | + 3.9% | JANATAINS | 11.6 | (4.1%) |

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

Sector Movement in DSE (December 10 - November 09)



Last 1 Month DSEX





News:

Money laundering from Bangladesh hits decade high

GFI report finds capital outflow from Bangladesh rose by 33.78pc in 2013; analysts point at political unrest that year

Illegal capital flight from Bangladesh surged 33.78 percent year-on-year to \$9.66 billion in 2013 through trade misinvoicing and other channels, according to a report of Global Financial Integrity.

The highest in a decade, the amount was more than six percent of the country's GDP and one-third of the export receipts in 2013. It is three times the size of average foreign direct investment Bangladesh received in recent times.

Analysts attribute the surge of illegal capital outflow to political violence and uncertainty that the country saw throughout 2013, particularly in the run-up to the parliamentary elections on January 5 last year.

<http://www.thedailystar.net/business/auction-mobile-number-portability-licence-feb-184318>

Inflation falls to 10-month low

Inflation fell to its lowest level in 10 months in November, meaning there will be no immediate need for Bangladesh Bank to change its policy rates. Last month, inflation declined 14 basis points from October to stand at 6.05 percent.

When the monetary policy for the current fiscal year was announced in July, it was mentioned that there are risks of inflationary pressure. But for the third month in a row, the overall inflation rate has dropped. Inflation appears to have remained stuck in the 6-6.4 percent range since November 2014.

While releasing the inflation data yesterday, Planning Minister AHM Mustafa Kamal said the inflation will fall further when winter vegetables become available in the market. Both food and non-food inflation dropped during the month, according to data from the Bangladesh Bureau of Statistics. Food inflation fell 17 basis points from October to 5.72 percent and non-food inflation 11 basis points to 6.56 percent.

<http://www.thedailystar.net/business/inflation-falls-10-month-low-184909>

Stay alert to protect country, PM tells army

The prime minister, Sheikh Hasina, on Thursday urged the newly commissioned officers of Bangladesh Army to always stay vigilant to protect the country's independence and sovereignty.

'You're taking the sacred responsibility of protecting the country... So, you'll have to stay alert always and be ready to save the country's independence and sovereignty even giving the last drop of your blood,' she said, reports United News of Bangladesh.

The prime minister was addressing the president's parade marking the commissioning of the cadets of 73rd BMA long course and 44th BMA

<http://newagebd.net/183201/stay-alert-to-protect-country-pm-tells-army/#sthash.p5eoquXK.dpuf>