



# AT CAPITAL DAILY MARKET UPDATE – September 03, 2015

## Overview

The DSEX closed at 4765.7 points, up by 1.8 points. The total transaction was worth BDT 5.0 bn.

Price of 174 issues appreciated whereas 95 issues declined and 44 others remained unchanged.

## Index Movements:

INDEX	VALUE	DAY CH(%)	MTD(%)	YTD(%)
DSEX	4,765.7	+0.0%	(0.1%)	(2.0%)
DSES	1,177.1	+0.1%	+0.1%	+2.3%
DS30	1,823.2	(0.1%)	(0.2%)	+1.1%

MARKET STAT		TODAY	LAST DAY	CHANGE(%)
MARKET CAP (Equity)	BDT MM	2,734,063.0	2,731,074.7	+0.1%
	USD MM	35,074.6	35,036.2	+0.1%
TURNOVER	BDT MM	4,985.9	3,488.2	+42.9%
	USD MM	64.0	44.7	+42.9%
VOLUME	MILLION SHARES	131.5	90.9	+44.6%

## Market Commentary:

Market ended flat today, following a tough battle between bargain hunters and profit takers, with higher investor participation. The premier benchmark index, DSEX, opened negative, and continued to be volatile until about 1 pm, trading within a range of 20 points after which it traded sideways for the last hour and a half to closed at 4765.7 which is 0.04% higher than the last trading session. Turnover stood at BDT 5.0 bn which is 42.9% higher than the last trading day.

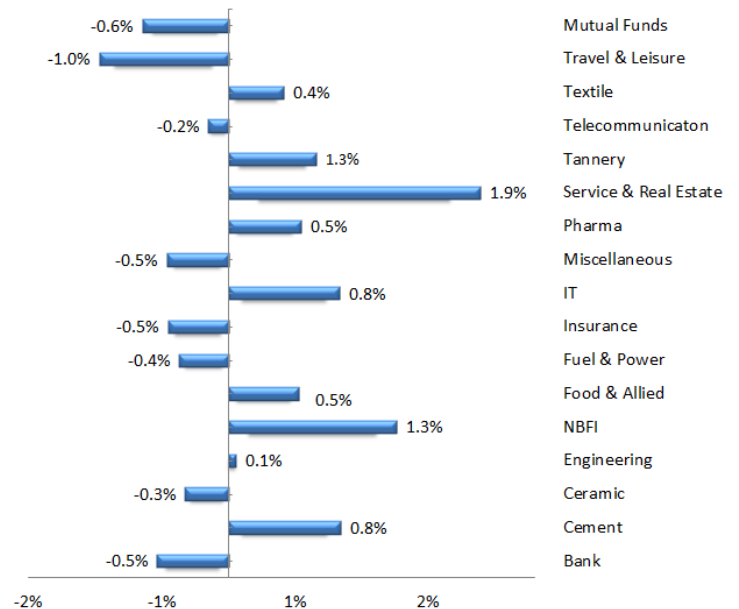
Among the prominent sectors NBFI, Cement, Pharma, Food & Allied, Textile and Engineering outperformed the market while the rest underperformed. Macroeconomic outlook remained good as inflation inched down by 0.19% this month, and the US expressed interest in expanding bilateral commercial relationships with Bangladesh through trade and investment.

Newly listed Aman Feed (AMANFEED) was the daily turnover leader for the third consecutive day contributing 12.2% to the total turnover.

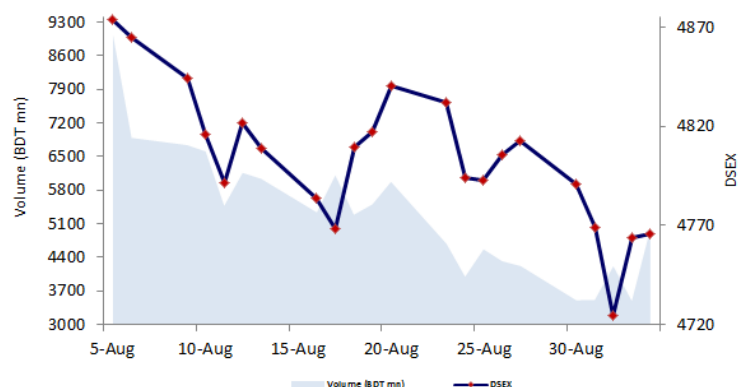
TOP 10 GAINERS			TOP 10 LOSERS		
TRADING CODE	CLOSEP	%CHANGE	TRADING CODE	CLOSEP	%CHANGE
MODERN DYE	158.1	+73.0%	ICB1STNRB	19.8	(10.0%)
ANWARGALV	63.4	+9.9%	PF1STMF	4.5	(10.0%)
MEGCONMILK	8.9	+9.9%	ICBSONALI1	6.5	(9.7%)
BEACHHATCH	22.5	+9.8%	IFILISLMF1	6.4	(8.6%)
AIBL1STMF	6.1	+8.9%	PRIME1ICBA	4.9	(7.5%)
FUWANGCER	14	+7.7%	ICB3RDNRB	4	(7.0%)
LEGACYFOOT	33.2	+7.4%	AMANFEED	79.5	(6.8%)
GEMINISEA	457.6	+7.2%	ICBAMCL2ND	4.4	(6.4%)
APEXFOODS	157.5	+7.2%	ICBEPMF1S1	5.5	(5.2%)
MBL1STMF	4.8	+6.7%	ICB2DNDRB	7.4	(5.1%)

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

## Sector Movement in DSE (September 03 - September 02)



## Last 1 Month DSEX





## **News:**

### **Inflation slows on tepid demand**

Inflation slowed by 0.19 percentage points to 6.17 percent in August from the previous month mainly due to a fall in consumer demand after Eid-ul-Fitr.

Non-food inflation slowed by 0.45 percentage points to 6.35 percent in August from July, although it was gradually rising since May and rose 0.65 percentage points month-on-month to 6.8 percent in July.

Low rice prices in domestic markets and low edible oil and sugar prices in international markets have cooled down consumer prices, Planning Minister AHM Mustafa Kamal told reporters at his ministry while releasing the data yesterday.

<http://www.thedailystar.net/business/inflation-slows-tepid-demand-137032>

### **Banks undergoing core risk test**

The central bank has started inspection to determine actual risks facing the country's banking system as a precautionary measure against any unforeseen crisis. A set of core-risk guidelines devised by the Bangladesh Bank is being used as one of the parameters to assess their risk status, officials said.

The Department of Banking Inspection (DBI)-1 of the Bangladesh Bank (BB) began the inspection on August 30 last by tightening its strategy to know the latest status in the core-risk-guideline implementation of 28 banks out of 56.

Under the latest strategy, the central bank is trying to verify the actual transactions done in a bank's books by using different techniques. The BB inspectors earlier collected information from the banks concerned in line with checklist and prepared their report on the core-risk-guideline implementation.

<http://www.thefinancialexpress-bd.com/2015/09/03/106365>

### **HC rejects writ on Sec 57 of ICT Act**

The High Court (HC) turned down on Wednesday a writ petition seeking the court's directive to scrap the much-talked-about sections 57 and 86 of the Information and Communication Technology (ICT) Act, reports UNB.

An HC bench of Justice Farah Mahbub and Justice Kazi MD Izarul Haque Akand passed the order after a hearing on the petition. On Tuesday, the HC bench set to deliver its judgment on Wednesday on a writ petition filed by one Zakir Hossain challenging the legality of the section 57 of the ICT Act.

Eleven teachers and writers filed the writ petition with the HC on Sunday challenging the legality of section 57 of the Information Communication Technology (Amendment) Act 2013.

<http://www.thefinancialexpress-bd.com/2015/09/03/106342>