



AT CAPITAL DAILY MARKET UPDATE – August 30, 2015

Overview

The DSEX closed at 4791.8 points, down by 21.8 points. The total transaction was worth BDT 3.5 bn.

Price of 104 issues appreciated whereas 166 issues declined and 44 others remained unchanged.

Index Movements:

INDEX	VALUE	DAY CH(%)	MTD(%)	YTD(%)
DSEX	4,791.0	(0.5%)	(0.0%)	(1.5%)
DSES	1,181.8	(0.4%)	(0.7%)	+2.7%
DS30	1,835.4	(0.3%)	(2.6%)	+1.8%

MARKET STAT		TODAY	LAST DAY	CHANGE(%)
MARKET CAP (Equity)	BDT MM	2,741,549.5	2,755,986.8	(0.5%)
	USD MM	35,170.6	35,355.8	(0.5%)
TURNOVER	BDT MM	3,503.5	4,215.9	(16.9%)
	USD MM	44.9	54.1	(16.9%)
VOLUME	MILLION SHARES	85.7	103.5	(17.2%)

Market Commentary:

Market returned to losing streak as investor kept themselves refrain from making fresh investment due to lack of solid market direction. The premier benchmark index, DSEX, opened positive gaining almost 10 points in the first five minutes then just felt steadily throughout the trading session to finally close at 4791.0 which is 0.5% lower than the last trading session. Turnover stood at BDT 3.5 bn which is 16.9% lower than the last trading day.

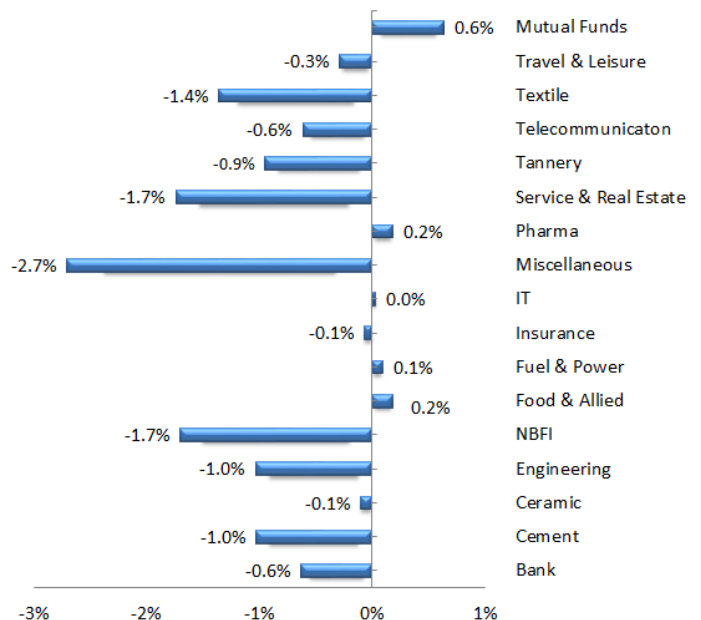
Among the prominent sectors Mutual Funds, Pharma, Food & Allied, Fuel & Power and Food & Allied outperformed the market while the rest underperformed.

TITAS GAS TRANSMISSION & DIST. CO. (TITASGAS) was the daily turnover leader contributing 5.6% to the total turnover.

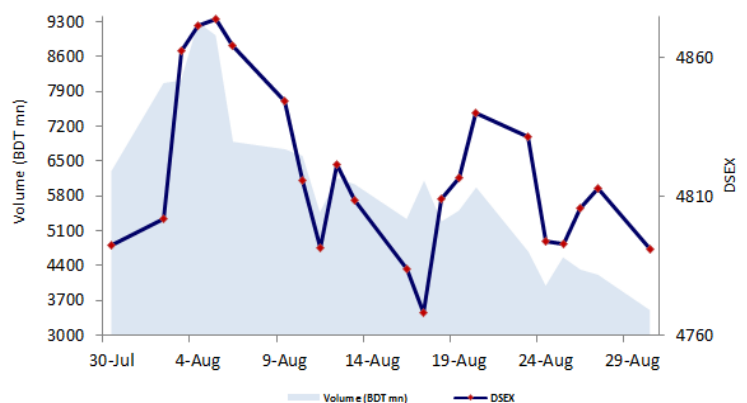
TOP 10 GAINERS			TOP 10 LOSERS		
TRADING CODE	CLOSEP	%CHANGE	TRADING CODE	CLOSEP	%CHANGE
SINOBANGLA	24.9	+9.7%	APEXFOODS	160.1	(7.4%)
MEGCONMILK	9.2	+9.5%	RELIANCINS	47	(6.2%)
AIBLISTIMF	5.1	+8.5%	MONNOSTAF	270.8	(5.8%)
KAY&QUE	12.1	+7.1%	NORTHERN	297.3	(4.9%)
ZEALBANGLA	8.1	+6.6%	MODERNDYE	92.8	(4.7%)
SHYAMPSUG	7.2	+5.9%	RNSPIN	22.6	(4.6%)
MIRACLEIND	17.2	+5.5%	BBS	48.2	(4.0%)
LEGACYFOOT	29.2	+4.3%	BDAUTOCA	34.1	(3.9%)
BDWELDING	22.6	+4.1%	BERGERPBL	2018.5	(3.8%)
NTC	652	+4.1%	STANCERAM	48.7	(3.8%)

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

Sector Movement in DSE (August 30 - August 27)



Last 1 Month DSEX





News:

Fitch forecasts stable GDP growth

The rating agency says political turmoil in Jan-Mar had small impact on official economic growth data

Fitch, a leading global credit rating agency, forecast Bangladesh's gross domestic product would grow 6.5 percent in the current fiscal year against the government's target of 7 percent.

Fitch on Friday released its latest outlook, saying: "Bangladesh's rating balances high, stable real GDP growth and persistently strong foreign-currency earnings from remittances and garment exports, against weak structural features, most prominently significant political and banking-sector risks."

<http://www.thedailystar.net/business/fitch-forecasts-stable-gdp-growth-134752>

Farm loan release drops in July due to flood

Farm loan disbursement decreased by 4.71 per cent in the first month of the current financial year 2015-16 compared with that in the same period of the FY15 while 11 scheduled banks disbursed no agriculture loan of their target.

According to Bangladesh Bank data, farm loan disbursement by all scheduled banks decreased to Tk 861.91 crore in July of the FY16 from that of Tk 904.53 crore in the corresponding period of the FY15.

A BB official told New Age on Thursday that the farm loan disbursement by the banks had been affected as a number of districts had faced floods during the last two months which put adverse impact on the banks' loan distribution to the farmers.

<http://newagebd.net/151351/farm-loan-release-drops-in-july-due-to-flood/#sthash.70MhT9ID.dpuf>

Power, gas price hikes already affecting house rent

Broadly speaking, there are three types of tenants in Dhaka city. The first group has individual electricity usage measuring electronic meters installed in their apartments. Usually, the monthly rent they pay to the landlord does not include the electricity bill; they pay it separately based on the usage.

The second group live in houses that have only one electricity meter for entire buildings. The owners of these houses therefore cannot calculate how much electricity the individual tenants have consumed. And so, the monthly rents generally include certain amounts, fixed whimsically by the landlord, as electricity bills.

The third category comprise the "mess" dwellers. These houses are basically inhabited by male students, working bachelors and married working men, who cannot afford having their families in Dhaka.

<http://www.dhakatribune.com/bangladesh/2015/aug/30/power-gas-price-hikes-already-affecting-house-rent#sthash.grTHtrMP.dpuf>