



# AT CAPITAL DAILY MARKET UPDATE – August 23, 2015

## Overview

The DSEX closed at 4831.7 points, down by 8.4 points. The total transaction was worth BDT 4.7 bn.

Price of 108 issues appreciated whereas 171 issues declined and 38 others remained unchanged.

## Index Movements:

INDEX	VALUE	DAY CH(%)	MTD(%)	YTD(%)
DSEX	4,831.7	(0.2%)	+ 0.8%	(0.7%)
DSES	1,185.0	(0.5%)	(0.4%)	+ 3.0%
DS30	1,844.2	(0.4%)	(2.1%)	+ 2.3%

MARKET STAT		TODAY	LAST DAY	CHANGE(%)
MARKET CAP (Equity)	BDT MM	2,754,550.2	2,758,094.8	(0.1%)
	USD MM	35,337.4	35,382.9	(0.1%)
TURNOVER	BDT MM	4,677.3	5,969.7	(21.6%)
	USD MM	60.0	76.6	(21.6%)
VOLUME	MILLION SHARES	127.2	144.5	(11.9%)

## Market Commentary:

Market ended in red today after three consecutive days of winning streak, with a decrease in investor participation. The premier benchmark index, DSEX, opened positive, gaining more than 25 points within the first half hour, all of which was wiped out in the very next half hour after which the index rose again another 10 points only to fall steadily for the rest of the session. The major bourse closed at 4831.7 which is 0.8% lower than the last trading session. Turnover stood at BDT 4.7 bn which is 21.6% lower than the last trading day.

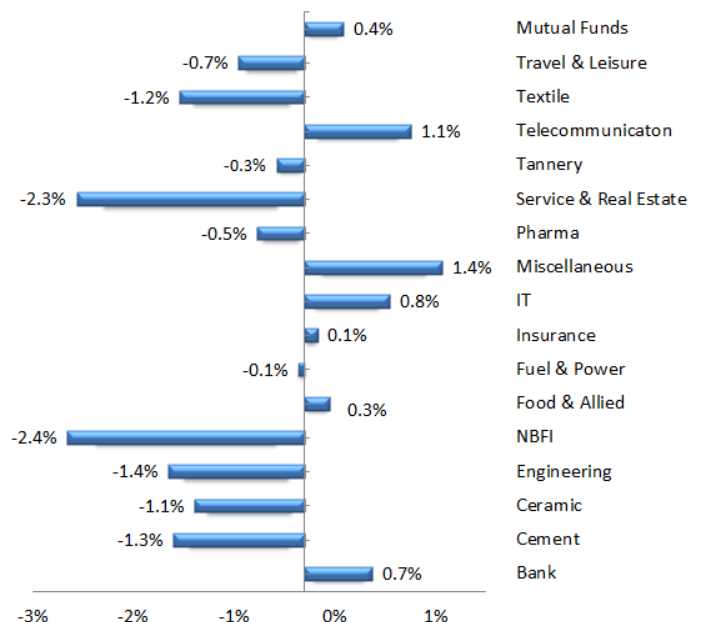
Among the prominent sectors Telecommunication, Bank, Food & Allied, Insurance and Fuel & Power outperformed the market while the rest underperformed. News about the recovery of Pharma sector in 2014 failed to have a positive impact on Pharma stocks, while Bank sector stocks continued to support the market.

Shahjibazar Power Co. (SPCL) was the daily turnover leader contributing 1.2% to the total turnover.

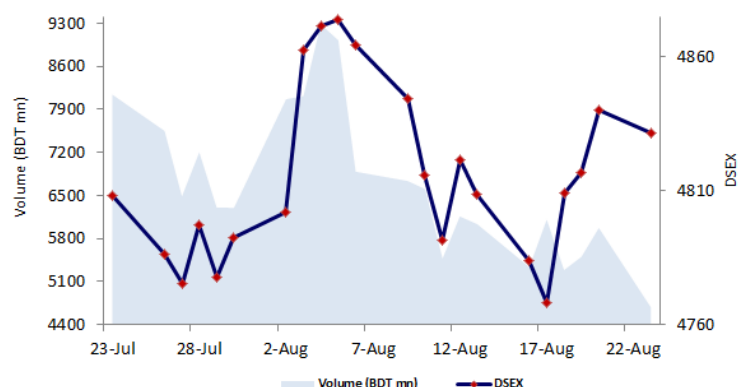
TOP 10 GAINERS			TOP 10 LOSERS		
TRADING CODE	CLOSEP	%CHANGE	TRADING CODE	CLOSEP	%CHANGE
IMAMBUTTON	11.2	+ 6.7%	SAVAREFR	44	(6.2%)
DAFODILCOM	16.7	+ 6.4%	ZEALBANGLA	6.3	(6.0%)
JUTESPINN	61.1	+ 5.9%	KAY&QUE	12	(5.5%)
AZIZPIPES	22	+ 5.3%	PRAGATILIF	93.1	(5.1%)
ICBIBANK	4.6	+ 4.5%	MONNOCERA	40.4	(4.7%)
TALLUSPIN	19.3	+ 4.3%	SHASHADNIM	42.8	(4.5%)
MEGCONMILK	7.5	+ 4.2%	1STICB	1596.7	(4.1%)
INTECH	12.7	+ 4.1%	ICB	139.2	(4.0%)
BANKASIA	15.3	+ 4.1%	NPOLYMAR	106.4	(4.0%)
4THICB	228.2	+ 4.1%	HAKKANIPUL	44	(3.9%)

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

Sector Movement in DSE (August 23 - August 20)



## Last 1 Month DSEX





## News:

### **Pharma industry on recovery path after 2013 slump Anti-ulcer drugs dominate BD medicine market**

Country's pharmaceutical market showed signs of recovery in 2014 after a worst year in 2013 the last quarter of which witnessed political troubles of serious nature.

The pharmaceutical market grew 11.37 per cent in 2014 to US\$ 1.4 billion, mainly driven by anti-ulcer drugs, according to findings by a foreign research organisation.

The market turnaround is still on as the first quarter of 2015 (January-March) saw more than a 2.0 percentage-point higher growth over the average 2014 rate. But the market is performing still below the expected level as it had once grown by even more than 20 per cent.

<http://www.thefinancialexpress-bd.com/2015/08/23/105023>

### **Draft mobile banking rules come under fire**

Bankers and analysts yesterday criticised the central bank's draft guidelines on mobile financial services that proposed forming a platform consisting of multiple players with no single party having more than 15 percent stake.

Khondker Ibrahim Khaled, a former deputy governor of Bangladesh Bank, said the existing mobile financial service (MFS) providers have invested a lot in building their systems, which are yet to yield profits. But right now, they are making do with losses under the hope that they would be logging in profits in 5-10 years' time.

If BB's proposed guidelines go through, then after three years the MFS providers will have to wind down their business and join the new system.

<http://www.thedailystar.net/business/banking/draft-mobile-banking-rules-come-under-fire-131104>

### **BNP demands proper trial of Aug 21 attack masterminds**

Terming the August 21 grenade attack heinous and terrorist in nature, the BNP has demanded proper trial of the masterminds of the grisly attack. Nazrul Islam Khan, a standing committee member of the party, came up with the demand after placing wreaths at party founder Ziaur Rahman's grave on Friday morning.

Nazrul said: "No matter who is behind the attack, we want punishment to the criminals after a proper investigation. "We have said it repeatedly but the Awami League still keeps blaming us and it is just because of political reasons."

The BNP leader said his party believes in democratic politics and there is no place of criminal activity in the party as his party does not get involved in any politics of killing.

<http://www.dhakatribune.com/politics/2015/aug/22/bnp-demands-proper-trial-aug-21-attack-masterminds#sthash.pgOSPulf.dpuf>