

Daily Market Update

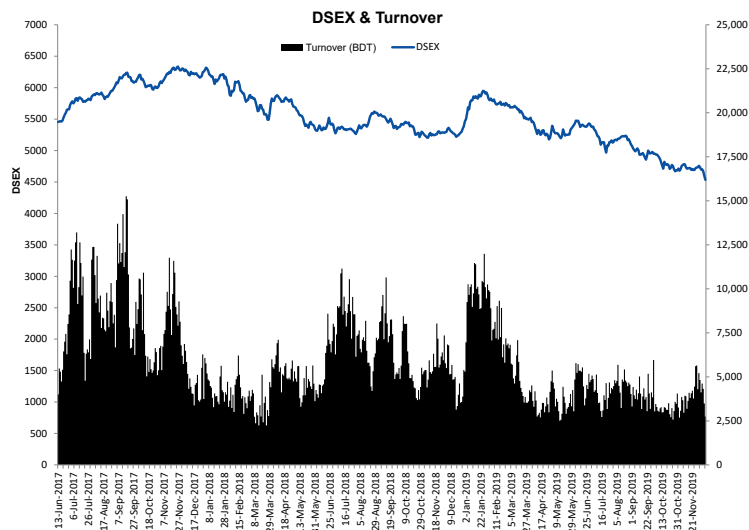
Market closed in red today. The benchmark index DSEX (-1.35%) lost 62.25 points and closed at 4,533.75 points. Both the blue chip index DS30 (-1.36%) and the Shariah-based index DSES (-1.83%) closed in red. All the large cap sectors showed negative performance today. Food & Allied experienced the highest loss of 2.13% followed by Pharmaceuticals (-1.73%), Engineering (-1.52%), NBFIs (-1.30%), Power (-1.19%), Telecommunication (-1.08%), and Banks (-0.72%). Turnover stood at BDT 2.8 billion (USD 33.1 million). Square Pharmaceuticals (-3.8%) was the most traded share with a turnover of BDT 89.0 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,327.24	1,336.83	-9.59	-0.72%	30	541,719.4	18.77%	354.8	13.31%
NBFIs	1,599.66	1,620.79	-21.13	-1.30%	23	147,886.5	5.12%	118.3	4.44%
Mutual Funds	600.42	601.32	-0.89	-0.15%	37	31,202.6	1.08%	86.7	3.25%
General Insurance	1,918.72	1,929.54	-10.82	-0.56%	35	51,972.7	1.80%	285.8	10.72%
Life Insurance	2,063.60	2,081.09	-17.50	-0.84%	12	57,536.0	1.99%	37.0	1.39%
Telecommunication	4,221.60	4,267.57	-45.98	-1.08%	2	424,299.8	14.70%	57.9	2.17%
Pharmaceuticals	2,548.68	2,593.49	-44.81	-1.73%	32	480,691.4	16.66%	353.9	13.27%
Fuel & Power	1,550.33	1,568.99	-18.66	-1.19%	20	384,325.4	13.32%	145.2	5.45%
Cement	1,165.62	1,180.87	-15.25	-1.29%	7	70,887.9	2.46%	39.5	1.48%
Services & Real Estate	921.32	921.37	-0.05	-0.01%	8	36,098.6	1.25%	24.7	0.93%
Engineering	2,301.73	2,337.31	-35.59	-1.52%	39	149,368.6	5.18%	254.9	9.56%
Food & Allied	12,721.17	12,997.98	-276.82	-2.13%	17	234,952.7	8.14%	119.7	4.49%
IT	1,749.63	1,809.64	-60.02	-3.32%	9	19,344.3	0.67%	111.9	4.20%
Textiles	1,060.47	1,068.24	-7.76	-0.73%	55	101,463.8	3.52%	304.8	11.43%
Paper & Printing	5,778.46	5,631.16	147.30	2.62%	3	11,047.9	0.38%	64.2	2.41%
Tannery	1,780.64	1,806.09	-25.45	-1.41%	6	19,174.5	0.66%	75.6	2.84%
Jute	12,745.61	13,104.38	-358.77	-2.74%	3	2,816.8	0.10%	12.4	0.46%
Ceramics	472.89	470.74	2.15	0.46%	5	22,840.1	0.79%	54.2	2.03%
Miscellaneous	1,768.86	1,795.89	-27.02	-1.50%	13	98,148.6	3.40%	164.4	6.17%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
New Line Clothings Limited	17.10	8.9%	44.3
Prime Finance First MF	18.80	8.0%	30.9
ICB Islamic Bank	3.00	7.1%	.3
Khulna Printing & Packaging Limited	14.40	5.9%	6.6
Emerald Oil Industries Ltd.	13.30	5.6%	.1
Hakkani Pulp & Paper	52.30	5.2%	15.1
Zaheen Spinning Limited	10.30	5.1%	41.3
C & A Textiles Limited	2.10	5.0%	.3
Meghna Pet Industries	9.10	4.6%	.0
Kay and Que	212.70	4.3%	14.0

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Daffodil Computers Ltd.	55.80	-8.4%	63.4
Zahintex Industries Ltd	4.10	-6.8%	.1
Dacca Dyeing	3.10	-6.1%	.1
BBS Cables Limited	58.20	-5.5%	21.4
Al-Haj Textile Mills Limited	37.80	-5.5%	5.0
Hwa Well Textiles (BD) Limited	33.00	-5.2%	.4
Evince Textile Limited	10.40	-4.6%	7.9
Bay Leasing	13.60	-4.2%	1.6
Tung Hai Knitting & Dyeing Limited	2.30	-4.2%	.0
BD Thai Aluminium	9.30	-4.1%	2.1

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Square Pharmaceuticals	191.10	-3.8%	89.0
Sinobangla Industries	81.50	-3.8%	76.3
Daffodil Computers Ltd.	55.80	-8.4%	63.4
British American Tobacco Bangladesh Company	1,040.50	-2.2%	56.9
National Tubes	136.90	0.6%	51.7
Beacon Pharmaceuticals Limited	35.90	-3.2%	48.8
BRAC Bank	57.50	-0.5%	46.3
The Premier Bank	12.30	-1.6%	46.3
Sonar Bangla Ins	42.40	1.7%	45.3
Reckitt Benckiser	3,047.70	4.0%	45.1



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,533.75	4,596.00	-62.25	-1.35%	-15.82%
DS30	1,561.51	1,583.06	-21.55	-1.36%	-16.98%
DSES	1,022.27	1,041.30	-19.03	-1.83%	-17.08%

	Advanced	Declined	Unchanged	Total
All Category	67	233	53	353
A Category (Equity)	46	176	39	261
B Category (Equity)	6	22	5	33
N Category (Equity)	3	6	0	9
Z Category (Equity)	12	29	9	50
Mutual Funds	7	10	20	37
Corporate Bonds	0	1	0	1

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,446,521.1	3,482,340.6	-1.0%
	Mn USD	41,459.4	41,890.3	
Turnover	Mn BDT	2,752.9	3,490.1	-21.1%
	Mn USD	33.1	42.0	
Volume	Mn Shares	104.0	139.5	-25.4%
Trade		101,917	119,028	-14.4%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	408.6	14.2%	43.36	11.7x	9.6x
British American Tobacco Bangladesh Company Limited	187.3	6.5%	56.86	21.7x	7.7x
Square Pharmaceuticals	161.3	5.6%	89.01	12.6x	2.5x
United Power Generation & Distribution Company Ltd	130.1	4.5%	26.41	15.4x	8.8x
Renata Ltd.	102.3	3.5%	2.52	26.0x	5.6x
BRAC Bank	70.9	2.5%	46.30	13.8x	1.9x
Berger Paints	64.1	2.2%	4.89	27.6x	9.6x
Investment Corporation of Bangladesh	60.4	2.1%	1.63	NM	2.1x
Marico Bangladesh Limited	53.2	1.8%	3.96	21.3x	36.1x
LafargeHolcim Bangladesh Limited	40.3	1.4%	34.84	22.4x	2.6x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	105.8	9.1%	89.01	12.6x	2.5x
Renata Ltd.	50.0	4.3%	2.52	26.0x	5.6x
British American Tobacco Bangladesh Company Limited	49.5	4.3%	56.86	21.7x	7.7x
Grameenphone Ltd.	40.9	3.5%	43.36	11.7x	9.6x
BRAC Bank	39.5	3.4%	46.30	13.8x	1.9x
Beximco Pharmaceuticals	26.9	2.3%	1.43	9.9x	1.1x
Olympic Industries	22.5	1.9%	7.82	16.0x	4.9x
Eastern Bank	18.8	1.6%	42.72	8.4x	1.2x
Pubali Bank	17.9	1.5%	1.31	6.8x	0.9x
National Bank	16.5	1.4%	6.26	7.1x	0.5x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
BRAC Bank	57.80	57.70	41.00	710,000	4
Coppertech Industries Limited	23.70	23.70	0.88	37,205	1
Daffodil Computers Ltd.	56.00	56.00	2.80	50,000	1
IFIC Bank	10.00	10.00	1.00	100,000	1
Orion Infusion	56.00	56.00	1.62	29,000	1
Sinobangla Industries	81.00	79.00	6.34	79,000	4
SK Trims & Industries Limited	49.80	49.60	29.82	600,000	4
Square Pharmaceuticals	193.40	193.40	1.86	9,600	3
S. S. Steel Limited	29.00	29.00	1.16	40,000	1
VFS Thread Dyeing Limited	23.50	23.50	0.52	22,000	1

Important DSE News

QUEENSOUTH

The Company has informed that the Board of Directors has decided to install two Gas Generators of 1500 KW each at an approximate cost of US \$ 0.80 million equivalents to BDT 68.00 million including installation and erection. After completion of installation of the generators approximate savings per month will be US \$ 44.00 thousand/ month (approx.) equivalent to BDT 3.7 million/month (approx.) the estimated savings after installation is significant, which will ultimately enhance the profitability of the Company. The estimated increase in profit after tax will be BDT 45.00 million/year (approx.).

BBSCABLES

Bangladesh Building Systems Ltd., one of the Shareholder Directors of the Company has expressed its intention to sell 10,00,000 shares (Bonus Shares) out of its total holding of 2,64,50,000 shares of

the Company at prevailing market price (In the Block Market) through Stock Exchange (DSE) within next 30 working days.

IBNSINA

Mr. M. Aatur Rahman, one of the Sponsors and Directors (Nominated by IBN Sina Trust) of the Company, has expressed his intention to buy 2,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange within next 30 working days.