

Daily Market Update

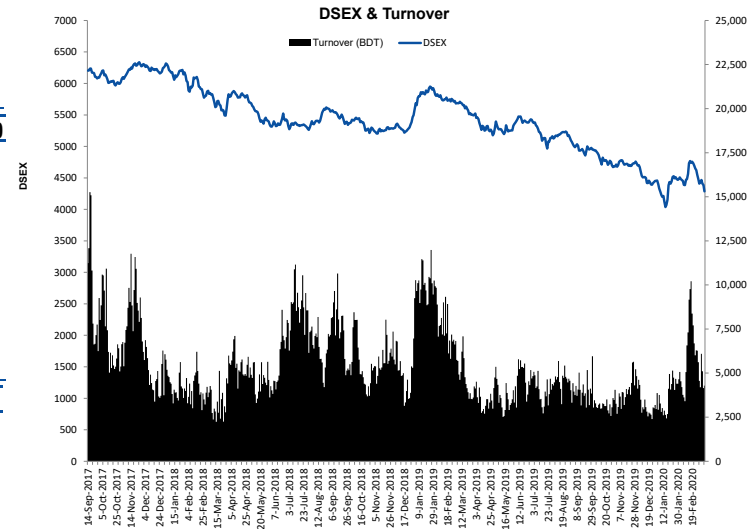
Market closed in red today. The benchmark index DSEX (-2.21%) lost 97.10 points and closed at 4,287.38 points. The blue chip index DS30 (-1.86%), the Shariah-based index DSES (-1.66%), and the large cap index CDSET (-1.98%) all closed in red. All the large cap sectors showed negative performance today except Telecommunication (+0.53%). Engineering booked the highest loss of 2.97% followed by Banks (-2.81%), NBFIs (-2.38%), Fuel & Power (-2.19%), Food & Allied (-1.15%) and Pharmaceuticals (-0.73%). Turnover stood at BDT 4.3 billion (USD 51.6 million). VFS Thread Dyeing Limited (-9.9%) was the most traded share with a turnover of BDT 132.3 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,145.01	1,178.13	-33.12	-2.81%	30	466,707.6	17.00%	209.3	5.00%
NBFIs	1,492.06	1,528.49	-36.43	-2.38%	23	137,940.4	5.02%	82.7	1.98%
Mutual Funds	611.07	630.39	-19.33	-3.07%	37	31,756.0	1.16%	78.0	1.86%
General Insurance	1,720.02	1,772.90	-52.88	-2.98%	35	46,471.7	1.69%	105.1	2.51%
Life Insurance	1,972.87	2,011.77	-38.90	-1.93%	12	55,006.5	2.00%	55.3	1.32%
Telecommunication	3,716.66	3,697.04	19.62	0.53%	2	373,550.2	13.61%	73.0	1.74%
Pharmaceuticals	2,542.03	2,560.63	-18.59	-0.73%	32	479,174.0	17.45%	818.4	19.56%
Fuel & Power	1,525.55	1,559.75	-34.20	-2.19%	19	378,181.2	13.78%	316.0	7.55%
Cement	1,298.68	1,366.11	-67.43	-4.94%	7	78,979.9	2.88%	109.8	2.62%
Services & Real Estate	1,006.36	1,025.28	-18.92	-1.85%	8	40,178.8	1.46%	89.3	2.13%
Engineering	2,282.78	2,352.67	-69.89	-2.97%	39	148,126.7	5.40%	652.6	15.59%
Food & Allied	12,199.98	12,341.48	-141.50	-1.15%	17	225,292.4	8.21%	191.7	4.58%
IT	1,967.07	2,051.01	-83.93	-4.09%	9	21,748.4	0.79%	157.3	3.76%
Textiles	1,081.56	1,126.01	-44.45	-3.95%	56	109,164.5	3.98%	625.9	14.96%
Paper & Printing	5,881.35	5,966.60	-85.25	-1.43%	3	11,244.6	0.41%	151.7	3.63%
Tannery	1,845.61	1,879.49	-33.89	-1.80%	6	19,758.5	0.72%	94.1	2.25%
Jute	9,336.37	9,624.28	-287.91	-2.99%	3	2,063.4	0.08%	45.6	1.09%
Ceramics	410.22	421.17	-10.95	-2.60%	5	20,799.8	0.76%	83.7	2.00%
Miscellaneous	1,788.10	1,838.56	-50.46	-2.74%	13	99,216.2	3.61%	245.4	5.86%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Apex Spinning & Knitting Mills Limited	127.30	9.8%	23.5
Kohinoor Chemicals	458.10	8.7%	51.7
Beach Hatchery Ltd.	16.40	7.9%	5.9
Apex Foods Limited	134.70	7.4%	33.1
Khulna Printing & Packaging Limited	20.80	6.7%	85.0
Anlimayarn Deying Ltd.	34.00	5.6%	15.0
Fareast Finance & Investment Limited	2.70	3.8%	.0
Shurwid Industries Limited	26.10	2.8%	30.3
Sea Pearl Beach Resort & Spa Limited	73.50	2.7%	44.6
Aramit Limited	235.50	2.5%	4.9

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
VFS Thread Dyeing Limited	26.40	-9.9%	132.3
Premier Cement Mills Limited	61.10	-9.7%	1.4
Saiham Textile	29.40	-9.5%	22.5
Mithun Knitting	7.70	-9.4%	.6
Orion Pharma Ltd.	38.50	-9.2%	73.0
International Leasing	3.10	-8.8%	7.7
GBB Power Limited	14.60	-8.8%	20.0
Indo-Bangla Pharmaceuticals Limited	22.00	-8.7%	57.4
BIFC	2.10	-8.7%	.1
Golden Harvest Agro Industries Ltd.	18.10	-8.6%	37.1

Most Traded Share	Close	Δ%	Turnover (mn BDT)
VFS Thread Dyeing Limited	26.40	-9.9%	132.3
Square Pharmaceuticals	186.40	0.6%	92.9
Khulna Printing & Packaging Limited	20.80	6.7%	85.0
Khulna Power Company Limited	48.20	-7.5%	77.9
Nahee Aluminium Composite Panel Ltd.	50.10	0.8%	73.9
Orion Pharma Ltd.	38.50	-9.2%	73.0
Orion Infusion	76.40	-5.4%	70.3
Monno Jute Staffers	834.90	1.1%	70.3
LafargeHolcim Bangladesh Limited	40.10	-5.2%	70.2
Genex Infosys Limited	59.60	-2.5%	63.0



Associate:
Md. Rafiqul Islam
 (880)1708805229
mrafiqulislam@bracepl.com

Associate:
Md. Mahirul Quddus
 (880)1709636546
mmahirul.quddus@bracepl.com

Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,287.38	4,384.48	-97.10	-2.21%	-3.72%
DS30	1,435.00	1,462.25	-27.24	-1.86%	-5.18%
DSES	999.07	1,015.93	-16.87	-1.66%	-0.08%
CDSET	847.41	864.51	-17.10	-1.98%	-5.82%

	Advanced	Declined	Unchanged	Total
All Category	37	304	14	355
A Category (Equity)	24	228	6	258
B Category (Equity)	7	41	0	48
N Category (Equity)	0	1	0	1
Z Category (Equity)	6	34	8	48
Mutual Funds	1	30	6	37
Corporate Bonds	1	1	0	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,315,106.5	3,367,470.6	
	Mn USD	39,878.6	40,508.5	-1.6%
Turnover	Mn BDT	4,289.3	4,151.4	3.3%
	Mn USD	51.6	49.9	
Volume	Mn Shares	160.3	156.4	2.5%
Trade		143,404	155,318	-7.7%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	358.8	13.1%	53.20	10.4x	8.5x
British American Tobacco Bangladesh Company Limited	174.2	6.3%	22.06	20.2x	7.2x
Square Pharmaceuticals	157.4	5.7%	92.88	11.9x	2.4x
United Power Generation & Distribution Company Ltd	126.0	4.6%	15.36	15.5x	8.6x
Renata Ltd.	94.1	3.4%	11.42	23.3x	5.2x
Berger Paints	63.7	2.3%	5.76	26.2x	9.5x
Investment Corporation of Bangladesh	59.4	2.2%	3.21	NM	2.9x
Marico Bangladesh Limited	51.8	1.9%	2.22	19.9x	35.2x
LafargeHolcim Bangladesh Limited	46.6	1.7%	70.24	25.9x	3.0x
BRAC Bank	45.1	1.6%	59.82	8.8x	1.2x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	103.2	9.3%	92.88	11.9x	2.4x
British American Tobacco Bangladesh Company Limited	46.1	4.2%	22.06	20.2x	7.2x
Renata Ltd.	46.0	4.1%	11.42	23.3x	5.2x
Grameenphone Ltd.	35.9	3.2%	53.20	10.4x	8.5x
BRAC Bank	25.1	2.3%	59.82	8.8x	1.2x
Olympic Industries	25.1	2.3%	7.86	17.3x	5.5x
Beximco Pharmaceuticals	23.5	2.1%	8.66	8.3x	1.0x
Eastern Bank	17.7	1.6%	2.32	7.9x	1.1x
LafargeHolcim Bangladesh Limited	16.4	1.5%	70.24	25.9x	3.0x
Pubali Bank	16.1	1.4%	1.25	6.1x	0.8x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
Aman Feed Limited	32.90	32.90	0.99	30,000	1
Bank Asia Ltd.	14.90	14.90	20.86	1,400,000	3
Beacon Pharmaceuticals Limited	62.00	62.00	57.09	920,792	2
City General Insurance	16.30	16.30	4.89	300,000	1
Delta Brac Housing	125.00	125.00	0.54	4,300	1
Genex Infosys Limited	59.00	59.00	5.90	100,000	1
Miracle Ind.	24.00	24.00	1.54	64,200	1
Nahee Aluminium Composite Panel Ltd.	47.00	47.00	1.01	21,400	2
Silva Pharmaceuticals Limited	19.10	19.10	0.57	30,000	1
SK Trims & Industries Limited	75.00	72.50	1.29	17,500	2
United Finance Limited	15.80	15.80	0.55	35,000	1
VFS Thread Dyeing Limited	30.00	29.90	7.78	260,000	8

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
NITOLINSU	Nitol Insurance Co. Ltd		0.0%	15.0%	31-Dec-2019	8-Mar-2020
SINGERBAN	Singer Bangladesh Limited		0.0%	77.0%	31-Dec-2019	9-Mar-2020
RELIANCEI	Reliance Insurance Ltd.		0.0%	25.0%	31-Dec-2019	11-Mar-2020
DELTABRAC	Delta Brac Housing Finance Corp. Ltd.		15.0%	20.0%	31-Dec-2019	11-Mar-2020
BRITISHAM	British American Tobacco Bangladesh Limited		0.0%	400.0%	31-Dec-2019	12-Mar-2020
UNITEDFIN	United Finance Ltd.		0.0%	10.0%	31-Dec-2019	12-Mar-2020

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
LINDEBANG	Linde Bangladesh Limited		0.0%	500.0%	31-Dec-2019	12-Mar-2020
IDLCFINAN	IDLC Finance Limited		0.0%	35.0%	31-Dec-2019	12-Mar-2020
PRIMEINSU	Prime Insurance Company Ltd.		0.0%	0.0%	31-Dec-2019	12-Mar-2020
IPDCFINAN	IPDC Finance Limited		5.0%	10.0%	31-Dec-2019	15-Mar-2020
GLAXOSMITH	GlaxoSmithKline Bangladesh Limited		0.0%	530.0%	31-Dec-2019	16-Mar-2020

Important DSE News

OLYMPIC

The Company has informed that the Board of Directors of the Company has executed a Deed of Agreement on March 05, 2020 to purchase Commercial Space measuring total 28,291 sft. along with 16 Car parking Space in under-construction 32-storied Commercial Building name "Trade Intercontinental 1973" being built on land leased by the Ministry of Housing and Public Works measuring one Bigha and ten Khata situated at Plot No. 213/A, Tejgaon Industrial & Commercial Area, Dhaka - 1208. The total purchase consideration for this Commercial Space and facilities thereof is Tk. 52,62,38,000.00. The Company shall also bear the required expenses and fees related to the registration and other miscellaneous expenses associated with the purchase of the aforementioned commercial space. Expected approximate completion and handover of commercial building is July, 2023.

MALEKSPIN

Dr. Shamim Matin Chowdhury, one of the Directors of the Company, has expressed her intention to buy 6,00,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.