

Daily Market Update

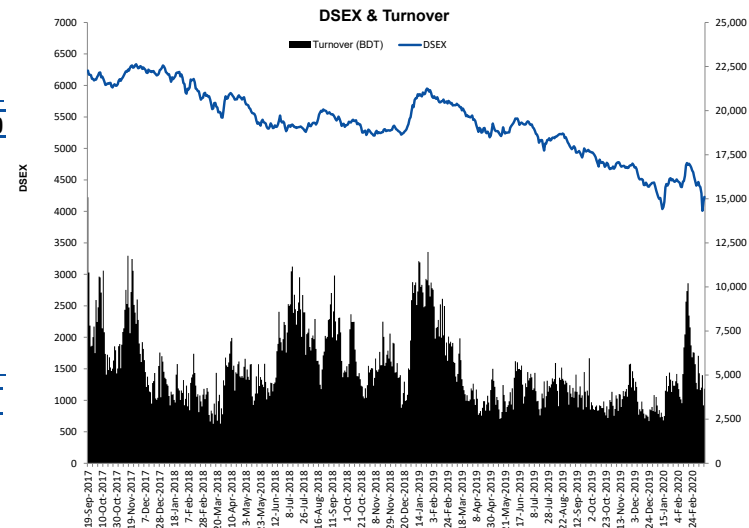
Market closed in green today. The benchmark index DSEX (+1.81%) gained 75.16 points and closed at 4,231.49 points. The blue chip index DS30 (+1.69%), the Shariah-based index DSES (+1.99%), and the large cap index CDSET (+1.47%) all closed in green. All the large cap sectors showed positive performance today. Engineering experienced the highest gain of 2.40% followed by Pharmaceuticals (+2.13%), NBFIs (+1.96%), Banks (+1.72%), Power (+1.71%), Food & Allied (+0.99%) and Telecommunication (+0.92%). Turnover stood at BDT 4.2 billion (USD 50.8 million). Monno Ceramic (+9.3%) was the most traded share with a turnover of BDT 158.3 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,138.85	1,119.56	19.29	1.72%	30	464,194.3	17.14%	260.9	6.33%
NBFIs	1,490.08	1,461.49	28.59	1.96%	23	137,757.4	5.09%	92.6	2.25%
Mutual Funds	604.48	591.68	12.80	2.16%	37	31,413.7	1.16%	57.6	1.40%
General Insurance	1,684.23	1,652.48	31.75	1.92%	35	45,505.0	1.68%	102.7	2.49%
Life Insurance	1,910.14	1,884.59	25.54	1.36%	12	53,257.4	1.97%	59.2	1.44%
Telecommunication	3,575.85	3,543.34	32.51	0.92%	2	359,397.9	13.27%	101.4	2.46%
Pharmaceuticals	2,519.56	2,467.04	52.52	2.13%	32	474,937.8	17.54%	978.1	23.73%
Fuel & Power	1,514.46	1,488.96	25.50	1.71%	19	375,432.7	13.87%	343.3	8.33%
Cement	1,292.12	1,243.87	48.24	3.88%	7	78,580.7	2.90%	157.6	3.82%
Services & Real Estate	1,024.35	1,005.64	18.71	1.86%	8	40,897.3	1.51%	83.9	2.04%
Engineering	2,233.36	2,180.99	52.37	2.40%	39	144,920.1	5.35%	605.9	14.70%
Food & Allied	12,015.09	11,896.87	118.22	0.99%	17	221,878.1	8.19%	181.8	4.41%
IT	1,943.75	1,911.12	32.63	1.71%	9	21,490.5	0.79%	81.2	1.97%
Textiles	1,060.03	1,042.93	17.09	1.64%	56	106,991.2	3.95%	445.0	10.80%
Paper & Printing	5,643.24	5,601.69	41.55	0.74%	3	10,789.4	0.40%	122.9	2.98%
Tannery	1,803.85	1,781.26	22.59	1.27%	6	19,311.5	0.71%	69.0	1.67%
Jute	8,880.62	8,794.14	86.47	0.98%	3	1,962.6	0.07%	27.0	0.66%
Ceramics	416.19	395.01	21.18	5.36%	5	21,102.4	0.78%	185.4	4.50%
Miscellaneous	1,761.86	1,741.18	20.68	1.19%	13	97,759.9	3.61%	166.5	4.04%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
In Tech Online Ltd.	19.80	10.0%	4.0
Orion Infusion	79.40	10.0%	101.2
Apex Spinning & Knitting Mills Limited	140.10	10.0%	32.8
Orion Pharma Ltd.	41.20	9.9%	87.4
M.I. Cement Factory Limited	48.20	9.5%	.3
Beacon Pharmaceuticals Limited	66.50	9.4%	125.3
MBL 1st Mutual Fund	7.00	9.4%	1.2
Premier Cement Mills Limited	63.30	9.3%	3.2
Monno Ceramic	124.50	9.3%	158.3
International Leasing	3.70	8.8%	20.5

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Khan Brothers PP Woven Bag Industries Limited	6.50	-4.4%	1.2
Keya Cosmetics	2.60	-3.7%	7.5
Alltex Industries Ltd.	7.80	-3.7%	.3
Jute Spinners	80.10	-3.4%	.0
Asia Pacific General Insurance Co. Ltd.	21.20	-3.2%	1.6
AB Bank Limited	6.90	-2.8%	3.0
Emerald Oil Industries Ltd.	11.00	-2.7%	.6
Progressive Life Ins	120.10	-2.5%	24.2
ICB AMCL 2nd MF	8.00	-2.4%	.7
Delta Spinnings Ltd.	4.00	-2.4%	1.6

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Monno Ceramic	124.50	9.3%	158.3
Square Pharmaceuticals	181.50	1.8%	131.3
Beacon Pharmaceuticals Limited	66.50	9.4%	125.3
Khulna Power Company Limited	49.30	5.8%	120.6
LafargeHolcim Bangladesh Limited	39.40	2.9%	107.9
Orion Infusion	79.40	10.0%	101.2
Orion Pharma Ltd.	41.20	9.9%	87.4
Bank Asia Ltd.	16.60	1.2%	77.2
Kohinoor Chemicals	494.80	8.7%	74.8
Grameenphone Ltd.	255.50	0.9%	74.4



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,231.49	4,156.32	75.16	1.81%	-4.97%
DS30	1,413.61	1,390.16	23.46	1.69%	-6.59%
DSES	979.55	960.41	19.14	1.99%	-2.03%
CDSET	833.44	821.37	12.07	1.47%	-7.37%

	Advanced	Declined	Unchanged	Total
All Category	270	40	44	354
A Category (Equity)	210	26	21	257
B Category (Equity)	36	5	7	48
N Category (Equity)	1	0	0	1
Z Category (Equity)	23	9	16	48
Mutual Funds	27	3	7	37
Corporate Bonds	2	0	0	2

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,277,151.0	3,230,831.7	1.4%
	Mn USD	39,422.0	38,864.8	
Turnover	Mn BDT	4,225.1	3,283.3	28.7%
	Mn USD	50.8	39.5	
Volume	Mn Shares	164.9	137.5	19.9%
Trade		137,545	121,768	13.0%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	345.0	12.8%	74.43	10.0x	8.1x
British American Tobacco Bangladesh Company Limited	173.2	6.4%	47.73	20.1x	7.1x
Square Pharmaceuticals	153.2	5.7%	131.25	11.6x	2.3x
United Power Generation & Distribution Company Ltd	125.6	4.6%	52.28	15.5x	8.5x
Renata Ltd.	93.0	3.4%	5.70	23.0x	5.1x
Berger Paints	62.7	2.3%	1.68	25.8x	9.4x
Investment Corporation of Bangladesh	58.6	2.2%	4.23	NM	2.8x
Marico Bangladesh Limited	52.0	1.9%	6.08	20.0x	35.3x
LafargeHolcim Bangladesh Limited	45.8	1.7%	107.91	25.4x	3.0x
BRAC Bank	44.0	1.6%	45.09	8.6x	1.1x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	100.5	9.2%	131.25	11.6x	2.3x
British American Tobacco Bangladesh Company Limited	45.8	4.2%	47.73	20.1x	7.1x
Renata Ltd.	45.4	4.2%	5.70	23.0x	5.1x
Grameenphone Ltd.	34.5	3.2%	74.43	10.0x	8.1x
BRAC Bank	24.5	2.2%	45.09	8.6x	1.1x
Olympic Industries	23.6	2.2%	19.15	16.3x	5.2x
Beximco Pharmaceuticals	23.2	2.1%	31.72	8.2x	1.0x
Eastern Bank	18.2	1.7%	.99	8.1x	1.1x
LafargeHolcim Bangladesh Limited	16.2	1.5%	107.91	25.4x	3.0x
Pubali Bank	15.6	1.4%	.31	6.0x	0.8x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
Aman Feed Limited	31.20	31.20	0.55	17,500	1
BRAC Bank	35.70	35.70	55.86	1,564,829	2
Confidence Cement	94.00	94.00	0.51	5,400	1
First Finance Limited	5.00	5.00	2.85	569,646	1
Malek Spinning Mills Ltd.	14.50	14.50	0.73	50,000	1
Marico Bangladesh Limited	1,642.90	1,642.90	17.31	10,534	1
National Life Insurance Company Ltd.	230.10	230.10	19.52	84,839	1
Northern Jute	368.90	368.90	1.33	3,600	1
National Polymer	60.70	60.70	0.51	8,316	1
SK Trims & Industries Limited	70.80	70.80	3.54	50,000	1

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
BRITISHAM	British American Tobacco Bangladesh	0.0%	400.0%	31-Dec-2019	12-Mar-2020	
UNITEDFIN	United Finance Ltd.	0.0%	10.0%	31-Dec-2019	12-Mar-2020	
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

NLTUBES

The Company has informed that the Board of Directors has decided to establish a steel Structure and Fabrication unit in its factory premises at total estimated cost of Tk. 1,33,85,000.00 where initial amount of investment will be Tk. 63,65,000.00 (Aprox), for production diversification. The Company also mentioned that around 1000 M.Ton fabrication works per year after full swing start the unit, about Tk. 50.00 lacs surplus revenue may be gained from the unit. There is scope of fabrication & galvanizing works in BEZA, EPZ, PDB, REB, PGCB, different Govt. Projects and various Govt. /Non-Govt. Organizations. The Company planned to established the unit in three steps.

NORTHRINNS

The Board of Directors of DSE has approved the change of name of the Company from "Northern General Insurance Company Limited." to "Northern Islami Insurance Limited." with effect from March 12, 2020. Other things (except name change) will remain unchanged.

SAG

Respected clients/investors, This is to notify that the ownership of Shah Mohammad Sagir & Co. Limited (DSE TREC # 171) is going to be transferred very soon. As such, you are requested to check and verify your own balance of different shares and cash in the portfolio statement against your BO Account and inform/lodge your valid claim(s), if any, with relevant supporting documents to the following addresses simultaneously: 1. The Chairman, Shah Mohammad Sagir & Co. Ltd., Suite # 401, Modhumita Bhaban (3rd Floor), 158-160, Motijheel C/A, Dhaka-1000; and 2. The Managing Director, Dhaka Stock Exchange Limited, DSE Tower, Plot # 46, Road # 21, Nikunja-2, Dhaka-1229. However, if you want to transmit your shares from the BO Account maintained with the said Company, you can do the same through opening Link Account. It is noted here that, any claim of clients/investors against the said company after March 25, 2020 shall in no way be entertained.

EXCH

Commencement of Bidding of Delta Hospital Limited through Book Building Method: The bidding period for eligible investors to determine the cut-off price of shares of Delta Hospital Limited through Electronic Subscription System (ESS) of the Exchanges will commence from 5:00 p.m. on March 22, 2020 and will continue till 5:00 p.m. on March 25, 2020 (round the clock) and valuation report submission period for eligible investors through ESS will start at 10:30 a.m. on March 29, 2020 and continue till 10:30 a.m. on March 31, 2020 (round the clock). Each Eligible Investor (EI) who intends to participate in the electronic bidding to determine the cut-off price of ordinary shares of Delta Hospital Limited shall require to maintain a minimum investment of Tk. 1.00 crore only at market price in the listed securities as on March 11, 2020 (day-end) as per Rule 2(1)(e) of the Bangladesh Securities and Exchange Commission (Public Issue) Rules, 2015; which is in accordance with the BSEC consent letter to Delta Hospital Limited Ref: BSEC/CI/BB-13/2017/54 dated February 27, 2020. The Central Depository Bangladesh Limited (CDBL) shall send a report to the exchange regarding the holding of EIs in the listed securities and the exchange shall ensure the compliance in this regard. Participating EIs will be required to pay full bid amount (100%) and bidding fee Tk. 5,000.00 (five thousand only) through The City Bank Limited (A/C Name: Dhaka Stock Exchange Limited, A/C No.: 1121063938001) in between 10:00 a.m. of March 22, 2020 to 2:00 p.m. of March 25, 2020 (during banking hour). Please visit the following website for bidding related updates: <https://www.essbangladesh.com>.