

## Daily Market Update

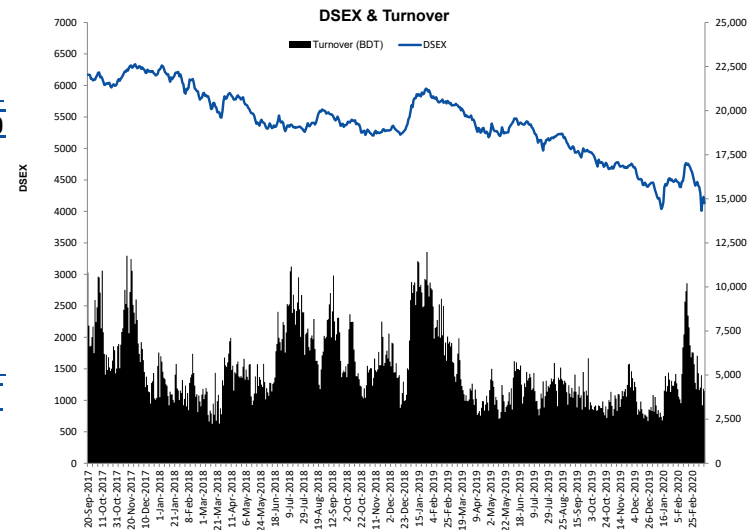
Market closed in red today. The benchmark index DSEX (-2.40%) lost 101.53 points and closed at 4,129.96 points. The blue chip index DS30 (-2.27%), the Shariah-based index DSES (-2.22%), and the large cap index CDSET (-2.21%) all closed in red. All the large cap sectors showed negative performance today. Engineering experienced the highest loss of 4.15% followed by NBFIs (-3.08%), Telecommunication (-3.01%), Banks (-2.59%), Power (-2.32%), Pharmaceuticals (-0.79%) and Food & Allied (-0.25%). Turnover stood at BDT 4.1 billion (USD 49.3 million). Orion Pharma Ltd. (+9.0%) was the most traded share with a turnover of BDT 184.7 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,109.34	1,138.85	-29.51	-2.59%	30	452,166.9	17.10%	192.5	5.12%
NBFIs	1,444.25	1,490.08	-45.83	-3.08%	23	133,520.6	5.05%	92.2	2.45%
Mutual Funds	591.39	604.48	-13.09	-2.17%	37	30,733.2	1.16%	74.5	1.98%
General Insurance	1,628.64	1,684.23	-55.60	-3.30%	35	44,002.9	1.66%	110.1	2.93%
Life Insurance	1,824.14	1,910.14	-85.99	-4.50%	12	50,859.8	1.92%	37.8	1.00%
Telecommunication	3,468.36	3,575.85	-107.49	-3.01%	2	348,594.5	13.18%	129.8	3.45%
Pharmaceuticals	2,499.60	2,519.56	-19.96	-0.79%	32	471,175.8	17.82%	1,029.2	27.36%
Fuel & Power	1,479.39	1,514.46	-35.07	-2.32%	19	366,738.8	13.87%	289.0	7.68%
Cement	1,252.91	1,292.12	-39.20	-3.03%	7	76,196.6	2.88%	116.4	3.09%
Services & Real Estate	985.51	1,024.35	-38.84	-3.79%	8	39,346.5	1.49%	93.9	2.49%
Engineering	2,140.76	2,233.36	-92.60	-4.15%	39	138,911.1	5.25%	540.6	14.37%
Food & Allied	11,985.05	12,015.09	-30.04	-0.25%	17	221,323.4	8.37%	119.0	3.16%
IT	1,863.96	1,943.75	-79.79	-4.10%	9	20,608.4	0.78%	72.3	1.92%
Textiles	1,016.35	1,060.03	-43.67	-4.12%	56	102,583.3	3.88%	397.6	10.57%
Paper & Printing	5,418.03	5,643.24	-225.21	-3.99%	3	10,358.8	0.39%	74.3	1.97%
Tannery	1,749.21	1,803.85	-54.64	-3.03%	6	18,726.6	0.71%	81.3	2.16%
Jute	8,670.86	8,880.62	-209.76	-2.36%	3	1,916.3	0.07%	28.6	0.76%
Ceramics	408.65	416.19	-7.54	-1.81%	5	20,719.9	0.78%	127.1	3.38%
Miscellaneous	1,732.45	1,761.86	-29.41	-1.67%	13	96,127.9	3.63%	156.0	4.15%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
In Tech Online Ltd.	21.70	9.6%	7.3
Orion Pharma Ltd.	44.90	9.0%	184.7
Premier Cement Mills Limited	68.50	8.2%	5.6
International Leasing	4.00	8.1%	22.6
Dacca Dyeing	3.10	6.9%	.5
Zeal Bangla Sugar Mills	35.80	6.9%	.0
Agricultural Marketing Company Ltd. (Pran)	190.10	6.1%	2.3
Kohinoor Chemicals	517.40	4.6%	45.8
Generation Next Fashions Limited	2.40	4.3%	1.6
Chittagong Vegetable	129.80	4.3%	41.5

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Reliance Insurance	37.00	-9.1%	.4
Salvo Chemical Industry Limited	10.80	-8.5%	.8
Central Pharmaceuticals Limited	13.10	-8.4%	37.9
Regent Textile Mills Limited	8.30	-7.8%	4.3
Miracle Ind.	18.60	-7.5%	10.2
Global Insurance Ltd.	15.00	-7.4%	1.5
Indo-Bangla Pharmaceuticals Limited	20.50	-7.2%	57.1
Bangladesh National Insurance Company Limited	18.40	-7.1%	1.0
Saiham Textile	26.30	-7.1%	13.7
GBB Power Limited	13.20	-7.0%	10.9

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Orion Pharma Ltd.	44.90	9.0%	184.7
Beacon Pharmaceuticals Limited	65.10	-2.1%	115.1
Orion Infusion	78.60	-1.0%	111.0
Grameenphone Ltd.	248.00	-2.9%	106.1
Monno Ceramic	122.50	-1.6%	101.4
Square Pharmaceuticals	179.80	-0.9%	99.9
Silva Pharmaceuticals Limited	19.30	-3.5%	83.6
Far Chemical Industries Limited	10.30	-5.5%	74.4
LafargeHolcim Bangladesh Limited	37.60	-4.6%	72.2
Khulna Power Company Limited	47.30	-4.1%	67.9



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,129.96	4,231.49	-101.53	-2.40%	-7.25%
DS30	1,381.59	1,413.61	-32.02	-2.27%	-8.71%
DSES	957.79	979.55	-21.76	-2.22%	-4.20%
CDSET	815.04	833.44	-18.40	-2.21%	-9.42%

	Advanced	Declined	Unchanged	Total
All Category	36	293	22	351
A Category (Equity)	23	222	10	255
B Category (Equity)	3	45	0	48
N Category (Equity)	0	1	0	1
Z Category (Equity)	10	25	12	47
Mutual Funds	3	27	7	37
Corporate Bonds	0	1	0	1

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,213,625.7	3,277,151.0	-1.9%
Mcap	Mn USD	38,657.8	39,422.0	-1.9%
Turnover	Mn BDT	4,094.2	4,225.1	-3.1%
Turnover	Mn USD	49.3	50.8	-3.1%
Volume	Mn Shares	159.0	164.9	-3.6%
Trade		135,688	137,545	-1.4%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	334.9	12.7%	106.15	9.7x	7.9x
British American Tobacco Bangladesh Company Limited	173.2	6.6%	.00	20.1x	7.1x
Square Pharmaceuticals	151.8	5.7%	99.85	11.5x	2.3x
United Power Generation & Distribution Company Ltd	122.4	4.6%	18.53	15.1x	8.3x
Renata Ltd.	93.2	3.5%	8.29	23.0x	5.1x
Berger Paints	62.4	2.4%	16.10	25.6x	9.3x
Investment Corporation of Bangladesh	56.1	2.1%	2.48	NM	2.7x
Marico Bangladesh Limited	51.1	1.9%	5.79	19.6x	34.7x
LafargeHolcim Bangladesh Limited	43.7	1.7%	72.25	24.2x	2.9x
BRAC Bank	42.2	1.6%	33.97	8.2x	1.1x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	99.5	9.3%	99.85	11.5x	2.3x
British American Tobacco Bangladesh Company Limited	45.8	4.3%	.00	20.1x	7.1x
Renata Ltd.	45.5	4.3%	8.29	23.0x	5.1x
Grameenphone Ltd.	33.5	3.1%	106.15	9.7x	7.9x
BRAC Bank	23.5	2.2%	33.97	8.2x	1.1x
Olympic Industries	23.5	2.2%	6.11	16.2x	5.2x
Beximco Pharmaceuticals	22.5	2.1%	9.37	7.9x	0.9x
Eastern Bank	17.6	1.6%	.72	7.8x	1.1x
LafargeHolcim Bangladesh Limited	15.4	1.4%	72.25	24.2x	2.9x
Pubali Bank	15.2	1.4%	2.53	5.8x	0.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
Beacon Pharmaceuticals Limited	62.00	62.00	186.00	3,000,000	1
Beximco Pharmaceuticals	64.40	64.40	27.50	426,984	1
IFIC Bank	10.00	10.00	78.45	7,844,465	1
Square Pharmaceuticals	180.60	178.80	39.77	221,000	5

### Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
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

#### HAKKANIPUL

Mr. Md. Golam Mostafa one of the Sponsor Directors of the Company, has expressed his intentions to sell 3,00,000 shares out of his total holding of 13,66,666 shares of the company at prevailing market price (In the Block market) through Stock Exchange (CSE) within next 30 working days.

#### 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/C/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>.