

Daily Market Update

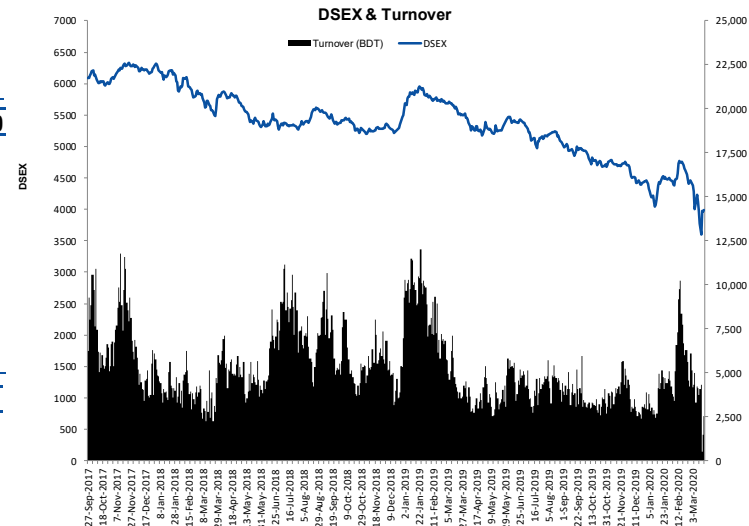
Market closed in green today. The benchmark index DSEX (+0.62%) gained 24.58 points and closed at 3,984.75 points. The blue chip index DS30 (+0.17%), the Shariah-based index DSES (+0.23%), and the large cap index CDSET (+0.44%) all closed in green. All the large cap sectors showed positive performance today except NBFIs (-0.05%). Banks posted the highest gain of 1.80% followed by Pharmaceuticals (+0.35%), Power (+0.26%), Telecommunication (+0.07%), Engineering (+0.01%) and Food & Allied (+0.00%). Turnover stood at BDT 2.5 million (USD 29.9 million). Monno Ceramic (-2.9%) was the most traded share with a turnover of BDT 120.4 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,100.64	1,081.16	19.48	1.80%	30	448,623.6	17.63%	241.8	11.71%
NBFIs	1,359.21	1,359.94	-0.74	-0.05%	23	125,658.0	4.94%	43.5	2.11%
Mutual Funds	568.18	568.34	-0.16	-0.03%	37	29,527.1	1.16%	26.3	1.27%
General Insurance	1,544.34	1,536.80	7.54	0.49%	35	41,725.2	1.64%	41.6	2.01%
Life Insurance	1,748.39	1,748.01	0.39	0.02%	12	48,747.8	1.92%	11.9	0.58%
Telecommunication	3,337.87	3,335.41	2.46	0.07%	2	335,479.2	13.19%	79.4	3.84%
Pharmaceuticals	2,412.86	2,404.33	8.53	0.35%	32	454,825.0	17.88%	607.5	29.41%
Fuel & Power	1,422.56	1,418.85	3.71	0.26%	19	352,649.5	13.86%	193.3	9.36%
Cement	1,188.55	1,198.79	-10.24	-0.85%	7	72,282.3	2.84%	21.4	1.04%
Services & Real Estate	952.68	949.80	2.87	0.30%	8	38,035.6	1.50%	8.4	0.41%
Engineering	2,025.39	2,025.09	0.30	0.01%	39	131,425.0	5.17%	264.0	12.78%
Food & Allied	11,270.14	11,269.90	0.24	0.00%	17	208,121.4	8.18%	75.0	3.63%
IT	1,777.62	1,779.23	-1.61	-0.09%	9	19,653.8	0.77%	26.6	1.29%
Textiles	948.01	948.39	-0.38	-0.04%	56	95,684.8	3.76%	70.7	3.42%
Paper & Printing	5,034.65	5,037.63	-2.98	-0.06%	3	9,625.8	0.38%	5.0	0.24%
Tannery	1,672.48	1,668.29	4.20	0.25%	6	17,905.1	0.70%	132.3	6.40%
Jute	7,930.69	7,926.87	3.83	0.05%	3	1,752.7	0.07%	8.2	0.40%
Ceramics	397.17	400.08	-2.91	-0.73%	5	20,138.1	0.79%	122.8	5.94%
Miscellaneous	1,663.72	1,663.49	0.23	0.01%	13	92,314.4	3.63%	86.0	4.16%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Mercantile Bank	12.30	10.8%	51.2
AB Bank Limited	7.70	10.0%	3.7
Central Pharmaceuticals Limited	13.20	10.0%	52.5
ACI Formulations Limited	106.80	10.0%	7.7
BD Welding	15.60	9.9%	.6
ACI Limited	202.20	6.3%	27.3
Desh Garments	109.30	5.9%	1.0
Prime Insurance	18.00	5.9%	.0
Alltex Industries Ltd.	7.90	5.3%	.3
Peoples Insurance	15.90	5.3%	.9

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Dulamia Cotton	49.30	-9.5%	.2
M.I. Cement Factory Limited	43.80	-8.4%	.3
International Leasing	4.20	-6.7%	8.6
Islami Insurance	20.90	-5.0%	.4
Meghna Cement	72.70	-4.7%	.5
MBL 1st Mutual Fund	6.50	-4.4%	.0
The Ibn Sina	217.70	-3.3%	1.9
Meghna Pet Industries	9.20	-3.2%	.0
Monno Ceramic	137.30	-2.9%	120.4
Kay and Que	210.90	-2.8%	12.3

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Monno Ceramic	137.30	-2.9%	120.4
Apex Footwear Limited.	223.80	2.1%	108.5
Orion Pharma Ltd.	42.50	1.2%	79.1
Orion Infusion	72.20	0.1%	62.3
Far Chemical Industries Limited	10.10	3.1%	55.5
Linde Bangladesh Limited	1,243.90	2.6%	54.3
National Tubes	103.20	0.1%	53.1
Central Pharmaceuticals Limited	13.20	10.0%	52.5
Mercantile Bank	12.30	10.8%	51.2
Square Pharmaceuticals	172.50	0.0%	51.1



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	3,984.75	3,960.17	24.58	0.62%	-10.51%
DS30	1,323.81	1,321.60	2.21	0.17%	-12.52%
DSES	918.81	916.67	2.14	0.23%	-8.10%
CDSET	786.86	783.43	3.43	0.44%	-12.55%

	Advanced	Declined	Unchanged	Total
All Category	97	47	208	352
A Category (Equity)	79	30	149	258
B Category (Equity)	8	8	32	48
N Category (Equity)	0	0	1	1
Z Category (Equity)	10	9	26	45
Mutual Funds	6	4	27	37
Corporate Bonds	0	0	2	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,112,525.6	3,102,306.6	
	Mn USD	36,635.2	36,514.9	0.3%
Turnover	Mn BDT	2,543.0	1,458.3	74.4%
	Mn USD	29.9	17.2	
Volume	Mn Shares	83.5	47.7	74.9%
Trade		27,329	27,329	0.0%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	322.5	12.7%	36.92	9.3x	7.6x
British American Tobacco Bangladesh Company Limited	163.4	6.4%	9.57	19.0x	6.7x
Square Pharmaceuticals	145.6	5.7%	51.12	11.0x	2.2x
United Power Generation & Distribution Company Ltd	116.0	4.6%	6.87	14.3x	7.9x
Renata Ltd.	90.9	3.6%	34.13	22.5x	5.0x
Berger Paints	60.7	2.4%	3.52	24.9x	9.1x
Investment Corporation of Bangladesh	52.5	2.1%	3.70	NM	2.5x
Marico Bangladesh Limited	49.2	1.9%	1.88	18.9x	33.4x
LafargeHolcim Bangladesh Limited	41.7	1.6%	10.69	23.2x	2.7x
BRAC Bank	39.3	1.5%	3.72	7.7x	1.0x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	95.5	9.3%	51.12	11.0x	2.2x
Renata Ltd.	44.4	4.3%	34.13	22.5x	5.0x
British American Tobacco Bangladesh Company Limited	43.2	4.2%	9.57	19.0x	6.7x
Grameenphone Ltd.	32.2	3.1%	36.92	9.3x	7.6x
BRAC Bank	21.9	2.1%	3.72	7.7x	1.0x
Olympic Industries	21.7	2.1%	1.98	15.0x	4.8x
Beximco Pharmaceuticals	21.4	2.1%	6.75	7.5x	0.9x
Eastern Bank	17.3	1.7%	.56	7.7x	1.0x
Pubali Bank	14.8	1.4%	.54	5.7x	0.7x
LafargeHolcim Bangladesh Limited	14.7	1.4%	10.69	23.2x	2.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
Beacon Pharmaceuticals Limited	60.70	60.70	124.76	2,055,331	4
BRAC Bank	31.90	31.90	4.32	135,345	1
Dhaka Bank	10.50	10.40	11.05	1,058,890	2
Dutch-Bangla Bank	63.00	63.00	0.76	12,000	1
Grameen One Scheme Two	12.20	12.20	0.93	76,200	1
IFIC Bank	9.30	9.30	0.93	100,000	1
Linde Bangladesh Limited	1,212.10	1,212.10	123.63	102,000	1
Renata Ltd.	1,030.00	1,030.00	206.00	200,000	1
VFS Thread Dyeing Limited	23.00	22.50	4.13	180,000	3

Important DSE News

BANKASIA

The Board of Directors has recommended 10% cash for the year ended on December 31, 2019. Date of AGM: 29.04.2020, Time: 11:00 AM. Venue: Convention Hall, Bank Asia Tower, 32-34, Kazi Nazrul Islam Avenue, Kawran Bazar, Dhaka-1215. Record Date: 13.04.2020. The Company has also reported Consolidated EPS of Tk. 1.68, Consolidated NAV per share of Tk. 21.09 and Consolidated NOCFPS of Tk. 22.94 for the year ended on December 31, 2019 as against Tk. 1.92 (restated), Tk. 19.89 and Tk. 3.00 respectively for the same period of the previous year. The Company also has informed that NOCFPS has been increased mainly due to deposit inflow in terms of previous year.

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>.