

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.50%) gained 24.5 points and closed at 4,902.16. The blue-chip index DS30 (+0.88%), the Shariah-based index DSES (+0.30%), and the large-cap index CDSET (+0.80%) closed at 1,690.28, 1,114.57, and 991.56 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 0.89% followed by Bank (+0.62%), Telecommunication (+0.31%) and Pharmaceutical (+0.20%). Engineering experienced the highest loss of 2.36% followed by Food & Allied (-0.39%) and Fuel & Power (-0.37%). Block trades contributed 1.3% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+4.4%) was the most traded share with a turnover of BDT 341 million.

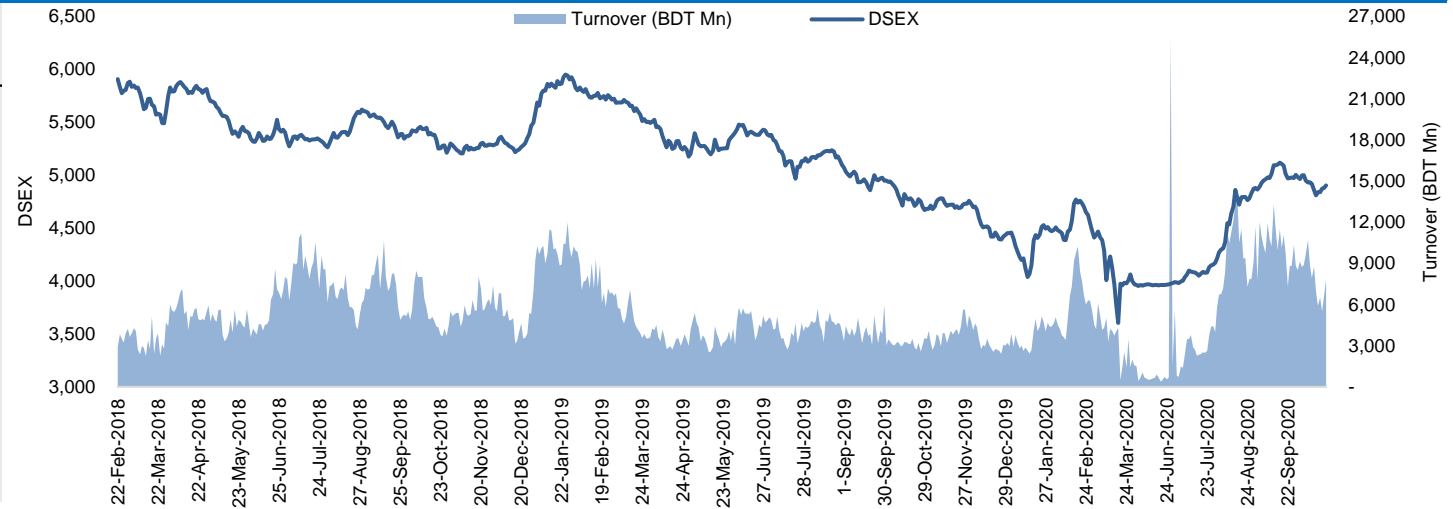


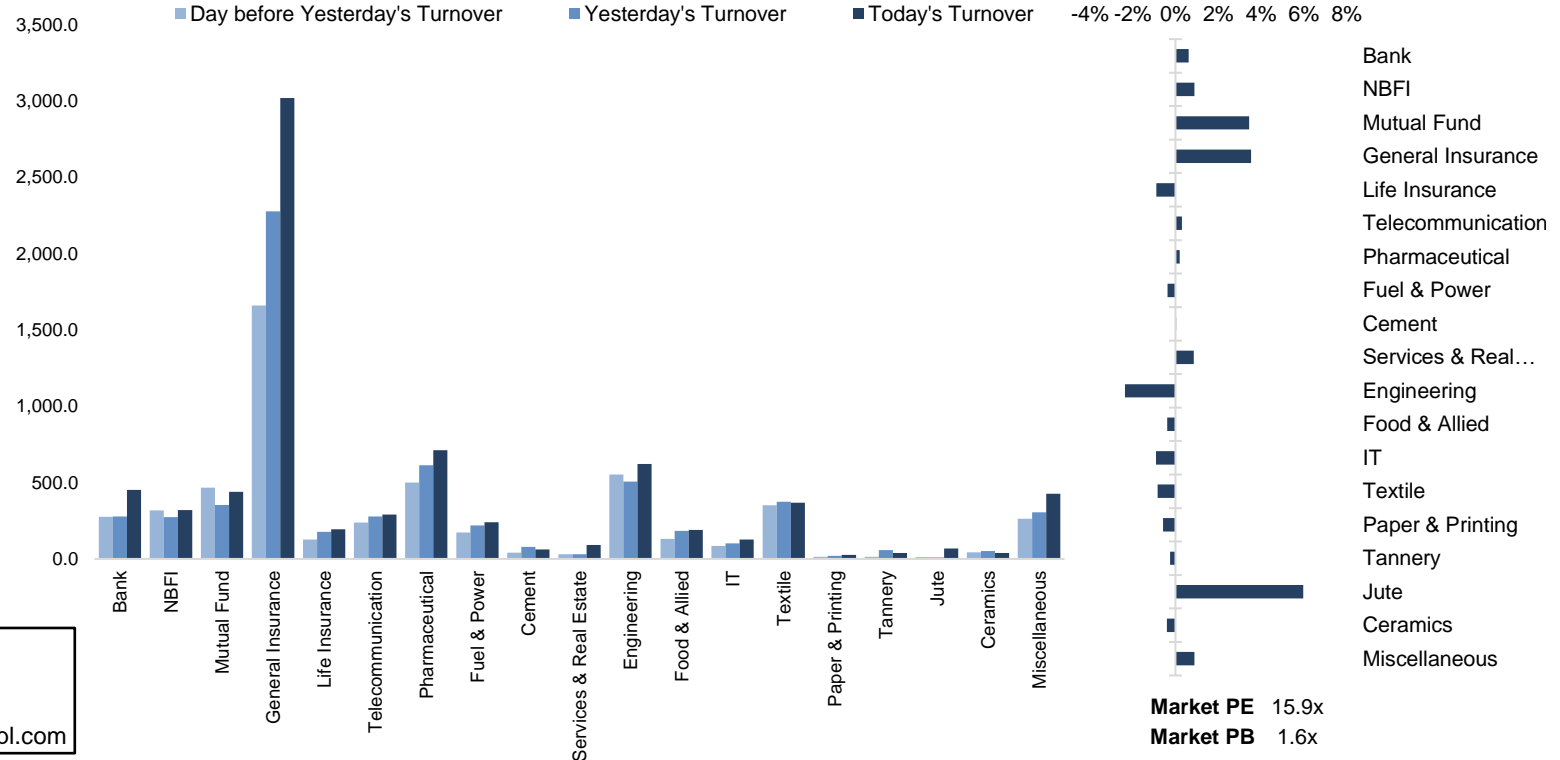
Figure: Sectorial Turnover (BDT Mn)

Figure: Sectorial Mcap Change

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,902.16	4,877.65	+24.50	+0.50%	+10.1%
DS30	1,690.28	1,675.55	+14.73	+0.88%	+11.7%
DSES	1,114.57	1,111.23	+3.34	+0.30%	+11.5%
CDSET	991.56	983.71	+7.85	+0.80%	+10.2%

	Advanced	Declined	Unchanged	Total
All Category	164	128	64	356
A Category (Equity)	126	87	47	260
B Category (Equity)	27	19	10	56
N Category (Equity)	1	2	0	3
Z Category (Equity)	10	20	7	37
Mutual Funds	32	2	3	37
Corporate Bonds	2	0	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	3,986,155	3,987,093	-0.0%
	Mn USD	46,918	46,929	
Turnover	Mn BDT	7,841	6,573	+19.3%
	Mn USD	92	77	
Volume	Mn Shares	287	237	+20.8%
No. of Trade		167,697	152,227	+10.2%



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Market PE 15.9x  
Market PB 1.6x

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,316	1,308	+8.07	+0.62%	30	544,520	15.8%	452.7	5.9%	8.0x	0.7x	GP	453,566	13.2%	58.8	12.7x	10.7x
NBFI	1,963	1,946	+17.26	+0.89%	23	177,637	5.2%	319.6	4.1%	NM	2.6x	WALTONHIL	242,131	7.0%	112.7	17.1x	3.1x
Mutual Fund	777	751	+25.84	+3.44%	37	39,850	1.2%	440.2	5.7%	NM	0.8x	BATBC	201,042	5.8%	50.9	17.6x	5.8x
General Insurance	3,353	3,239	+114.48	+3.53%	36	86,051	2.5%	3,018.9	39.1%	21.5x	1.8x	SQURPHARMA	172,309	5.0%	81.0	12.6x	2.4x
Life Insurance	1,970	1,988	-17.66	-0.89%	12	53,561	1.6%	193.3	2.5%	NM	NM	UPGDCL	155,464	4.5%	88.5	21.7x	5.5x
Telecommunication	4,707	4,693	+14.42	+0.31%	2	477,428	13.9%	291.5	3.8%	13.1x	9.8x	RENATA	101,904	3.0%	9.1	23.8x	5.2x
Pharmaceutical	2,975	2,970	+5.87	+0.20%	32	563,285	16.4%	712.7	9.2%	18.8x	2.5x	ICB	77,742	2.3%	10.7	NM	4.1x
Fuel & Power	1,726	1,732	-6.48	-0.37%	19	426,318	12.4%	239.5	3.1%	11.7x	1.3x	MARICO	72,412	2.1%	5.7	27.4x	52.2x
Cement	1,294	1,293	+0.46	+0.04%	7	79,865	2.3%	62.6	0.8%	29.7x	2.0x	BERGERPBL	63,668	1.9%	1.1	31.6x	6.6x
Services & Real Estate	1,017	1,008	+8.70	+0.86%	9	40,482	1.2%	91.3	1.2%	22.4x	0.8x	BRACBANK	54,891	1.6%	230.4	15.2x	1.2x
Engineering	3,451	3,534	-83.41	-2.36%	40	391,944	11.4%	621.1	8.0%	17.9x	1.7x	LHBL	48,081	1.4%	32.8	23.3x	2.9x
Food & Allied	13,539	13,592	-53.21	-0.39%	17	255,118	7.4%	189.5	2.5%	19.7x	6.0x	BXPBARMA	47,775	1.4%	340.5	14.0x	1.6x
IT	2,047	2,066	-18.71	-0.91%	10	23,050	0.7%	126.4	1.6%	20.0x	2.2x	SUMITPOWER	43,783	1.3%	12.7	7.9x	1.3x
Textile	1,116	1,125	-9.42	-0.84%	56	112,663	3.3%	368.1	4.8%	NM	0.8x	ISLAMIBANK	42,021	1.2%	16.9	8.0x	0.7x
Paper & Printing	5,142	5,172	-30.16	-0.58%	4	14,535	0.4%	26.3	0.3%	250.1x	1.0x	OLYMPIC	36,069	1.0%	15.2	17.8x	4.6x
Tannery	1,674	1,678	-4.30	-0.26%	6	18,054	0.5%	39.7	0.5%	NM	1.7x	DUTCHBANGL	35,970	1.0%	5.0	7.6x	1.1x
Jute	10,633	10,034	+599.06	+5.97%	3	2,372	0.1%	68.0	0.9%	NM	8.9x	TITASGAS	32,743	1.0%	15.1	8.4x	0.5x
Ceramics	427	428	-1.70	-0.40%	5	22,037	0.6%	38.5	0.5%	62.3x	1.5x	EBL	28,819	0.8%	1.4	7.2x	1.0x
Miscellaneous	1,966	1,949	+17.17	+0.88%	13	110,014	3.2%	427.8	5.5%	25.5x	1.2x	MJLBD	26,766	0.8%	2.6	14.5x	1.9x
												GLAXOSMITH	26,388	0.8%	0.7	25.5x	20.8x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ASIAINS	58.3	+10.0%	140.2	34.5x	2.8x
REPUBLIC	49.6	+10.0%	186.6	24.0x	3.0x
DHAKAINS	48.5	+10.0%	76.3	22.7x	2.4x
PROVATIINS	50.9	+9.9%	269.2	20.0x	2.5x
SONARBAINS	52.2	+9.9%	159.7	18.7x	2.6x
SSSTEEL	13.4	+9.8%	140.9	5.9x	0.7x
JUTESPINN	162.0	+9.8%	4.0	NM	NM
GLOBALINS	36.9	+9.8%	102.7	52.4x	3.1x
PENINSULA	19.1	+9.8%	63.8	43.5x	0.6x
PEOPLESINS	36.0	+9.8%	65.3	14.4x	1.2x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	112,742	8.8%	12.6x	2.4x
BATBC	53,176	4.2%	17.6x	5.8x
RENATA	49,750	3.9%	23.8x	5.2x
GP	45,357	3.5%	12.7x	10.7x
BXPBARMA	41,473	3.2%	14.0x	1.6x
BRACBANK	30,580	2.4%	15.2x	1.2x
OLYMPIC	26,053	2.0%	17.8x	4.6x
ISLAMIBANK	20,472	1.6%	8.0x	0.7x
EBL	20,121	1.6%	7.2x	1.0x
CITYBANK	17,583	1.4%	13.2x	1.0x
BEXIMCO	17,354	1.4%	23.0x	0.4x
PUBALIBANK	17,260	1.3%	17.8x	0.8x
LHBL	16,982	1.3%	23.3x	2.9x
SUMITPOWER	16,121	1.3%	7.9x	1.3x
UPGDCL	15,546	1.2%	21.7x	5.5x
NBL	15,028	1.2%	5.4x	0.4x
BEACONPHAR	12,143	0.9%	151.0x	5.7x
PRIMEBANK	11,687	0.9%	16.7x	0.7x
SOUTHEASTB	11,001	0.9%	8.1x	0.4x
UCB	10,885	0.9%	6.5x	0.5x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BXPBARMA	117.8	+4.4%	340.5	14.0x	1.6x
BEXIMCO	24.8	+5.1%	292.5	23.0x	0.4x
PROVATIINS	50.9	+9.9%	269.2	20.0x	2.5x
CONTINIINS	60.9	-	263.7	53.9x	2.9x
BSCCL	144.7	+1.0%	232.7	28.6x	3.6x
BRACBANK	41.4	+5.3%	230.4	15.2x	1.2x
REPUBLIC	49.6	+10.0%	186.6	24.0x	3.0x
ASIAPACINS	70.9	+2.3%	185.2	36.1x	3.3x
SONARBAINS	52.2	+9.9%	159.7	18.7x	2.6x
BGIC	42.0	+1.2%	152.2	32.8x	2.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SAVAREFR	317.2	-8.7%	6.1	NM	82.8x
ZAHINTEX	6.0	-6.3%	2.1	NM	0.3x
KEYACOSMET	6.6	-5.7%	25.9	19.7x	0.5x
SUNLIFEINS	19.7	-5.3%	1.2	NM	NM
PROGRESLIF	106.6	-5.1%	27.4	NM	NM
AIL	27.9	-4.5%	12.7	15.3x	1.4x
DESHBANDHU	11.0	-4.3%	7.0	3.6x	1.0x
RUPALILIFE	63.5	-3.9%	43.0	NM	NM
TALLUSPIN	4.9	-3.9%	0.4	NM	0.4x
EASTERNINS	78.9	-3.8%	39.7	21.6x	1.7x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
AMANFEED	26.7	26.7	0.5	20	1
ASIAINS	52	52	0.8	15	1
BDFINANCE	25.5	23.5	4.9	198	4
BEXIMCO	24.5	24.5	2.7	110	1
BRACBANK	40	40	3.4	85	2
CENTRALINS	49	47.9	29.8	609	7
DBH	92.6	89	4.9	54	5
FINEFOODS	92.5	92.5	1.4	15	1
GRAMEENS2	13.3	13.3	0.5	38	1
INTECH	39.1	39.1	0.8	20	1

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
LANKABAFIN	21.2	21.2	2.1	100	1
MLDYEING	49.4	45	1.6	33	3
NCCBANK	12.2	12.2	20.1	1,650	1
NITOLINS	60.7	60.7	1.2	20	1
NPOLYMAR	70	70	3.5	50	1
PIONEERINS	71.6	71.6	0.5	7	1
POPULARLIF	83.5	83.5	14.6	175	1
PROVATIINS	50.9	50	5.4	106	3
<b>Total</b>			<b>98.6</b>		<b>36</b>

**Important DSE News**
**BDTHAI**

EPS was Tk. 0.26 for July-September 2020 as against Tk. 0.06 for July-September 2019; NOCFPS was Tk. (0.22) for July-September 2020 as against Tk. (0.58) for July-September 2019. NAV per share was Tk. 27.87 as on September 30, 2020 and Tk. 27.60 as on June 30, 2020.

**ISLAMICFIN**

EPS was Tk. 0.29 for July-September 2020 as against Tk. 0.28 for July-September 2019; EPS was Tk. 0.99 for January-September 2020 as against Tk. 0.94 for January-September 2019. NOCFPS was Tk. 6.33 for January-September 2020 as against Tk. (9.62) for January-September 2019. NAV per share was Tk. 14.45 as of September 30, 2020 and Tk. 14.00 as of September 30, 2019.

**PEOPLESINS**

EPS was Tk. 0.87 for July-September 2020 as against Tk. 0.21 for July-September 2019; EPS was Tk. 1.68 for January-September 2020 as against Tk. 1.06 for January-September 2019. NOCFPS was Tk. 1.86 for January-September 2020 as against Tk. 1.05 for January-September 2019. NAV per share was Tk. 28.83 as on September 30, 2020 and Tk. 26.34 as on September 30, 2019.

**GP**

EPS was Tk. 6.59 for July-September 2020 as against Tk. 5.38 for July-September 2019; EPS was Tk. 19.89 for January-September 2020 as against Tk. 18.75 for January-September 2019. NOCFPS was Tk. 18.61 for January-September 2020 as against Tk. 35.25 for January-September 2019. NAV per share was Tk. 31.29 as on September 30, 2020 and Tk. 21.53 as on September 30, 2019.

The Company has informed that the Board has taken the following decision with regard to Accenture Communications and Infrastructure Solution Limited (ACISL), as associate company of GP: That GP nominated directors in the Board of ACISL and GP representative in the Extra-ordinary General Meeting of ACISL shareholders to be called for passing a special resolution for winding up ACISL by court to vote in favour of winding up.

**EXCH**

Commencement of Bidding of Index Agro Industries Limited through Book Building Method: The bidding period for Eligible Investors to determine the cut-off price of shares of Index Agro Industries Limited through Electronic Subscription System (ESS) of the Exchanges will commence from 5:00 p.m. on November 01, 2020 and will continue till 5:00 p.m. on November 04, 2020 (round the clock) and valuation report submission period for Eligible Investors through Electronic Subscription System (ESS) of the Exchanges will start at 10:30 a.m. on November 05, 2020 and continue till 10:30 a.m. on November 09, 2020. Each EI who intends to participate in the electronic bidding shall maintain a minimum investment of Tk. 1.00 crore only in listed securities as on the end of 21st of October, 2020 as per clause (e) of sub-rule (1) of rule 2 of the Bangladesh Securities and Exchange Commission (Public Issue) Rules, 2015. The minimum bidding value for bidding shall be BDT 45 (Forty-Five) lakh which is in accordance with the BSEC consent letter to Index Agro Industries Limited Ref: BSEC/CI/BB-06/2016/232 dated October 15, 2020. The Central Depository Bangladesh Limited (CDBL) shall send a report to the exchange regarding holding of EIs in 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 BDT 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 November 01, 2020 to 2:00 p.m. of November 04, 2020 (during banking hour). Please visit the following website for bidding related updates: <https://www.essbangladesh.com>.

**MEGHNALIFE**

Increase in life revenue account for July-September, 2020 was Tk. 296.05 million as against increase in Tk. 185.27 million for July-September, 2019. Whereas increase in life revenue account for Jan- September, 2020 was Tk. 14.19 million with total life insurance fund of Tk. 17,921.92 million as against increase in Tk. 82.24 million and Tk. 16,949.57 million respectively for the same period of previous year.

**UNIONCAP**

Engr. M. Abu Taher, one of the Sponsors of the Company, has expressed his intention to sell 15,86,826 shares out of his total holding of 21,06,826 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within October 29, 2020.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
APEXTANRY	-	0.0%	12.0%	Record Date	20-Oct-20
BARKAPOWER	-	NA	NA	Record Date	21-Oct-20
PRIMEFIN	-	0.0%	2.0%	Record Date	22-Oct-20
SINGERBD	-	NA	NA	Record Date	22-Oct-20
NAHEEACP	-	7.0%	8.0%	Record Date	22-Oct-20
BDTHAI	-	3.0%	3.0%	Record Date	29-Oct-20

**Upcoming IPOs**

Company Name	Event	Opening Date	Closing Date
Dominage Steel Building	Subscription	19-10-20	25-10-20
Index Agro Industries	Bidding	01-11-20	04-11-20
Crystal Insurance	Subscription	10-11-20	16-11-20

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**CONTININS**

Mr. S.M. Abu Mohsin, one of the Sponsors of the Company, has expressed his intention to transfer his entire holding of 8,77,372 shares to his son Mr. Syed Adeeb Ashfaq Uddin, another Directors of the Company, by way of gift outside the trading system of the Exchange within October 29, 2020.