

## Daily Market Update

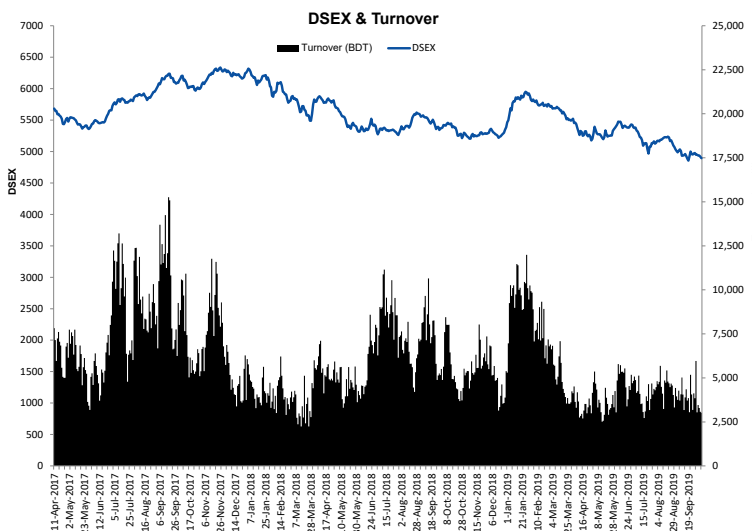
Market closed in red today. The benchmark index DSEX (-0.46%) lost 22.37 points and closed at 4,894.31 points. Both the blue chip index DS30 (-0.47%) and the Shariah based index DSES (-0.24%) closed in red. The large cap sectors showed negative performance today except Pharmaceuticals (+0.31%). Power experienced the highest loss of 1.28% followed by Telecommunication (-1.11%), Food & Allied (-0.84%), NBFIs (-0.79%), Engineering (-0.46%), and Banks (-0.35%). Turnover stood at BDT 3.0 billion (USD 36.3 million). National Tubes (-1.8%) was the most traded share with a turnover of BDT 209.8 million.

| Sector Index           | Closing   | Opening   | Δ(Pts)  | Δ%     | No. of Cos | Sectoral Mcap | % of Total Mcap | Sectoral Turnover | % of Total Turnover |
|------------------------|-----------|-----------|---------|--------|------------|---------------|-----------------|-------------------|---------------------|
| Banks                  | 1,350.92  | 1,355.63  | -4.71   | -0.35% | 30         | 551,386.2     | 17.60%          | 186.7             | 6.33%               |
| NBFIs                  | 1,662.45  | 1,675.66  | -13.21  | -0.79% | 23         | 153,690.7     | 4.91%           | 43.7              | 1.48%               |
| Mutual Funds           | 651.52    | 644.32    | 7.20    | 1.12%  | 37         | 33,858.0      | 1.08%           | 338.9             | 11.49%              |
| General Insurance      | 1,876.15  | 1,899.55  | -23.39  | -1.23% | 35         | 50,819.7      | 1.62%           | 193.6             | 6.56%               |
| Life Insurance         | 2,115.41  | 2,115.12  | 0.29    | 0.01%  | 12         | 58,980.8      | 1.88%           | 28.7              | 0.97%               |
| Telecommunication      | 4,780.95  | 4,834.75  | -53.80  | -1.11% | 2          | 480,518.2     | 15.34%          | 81.0              | 2.75%               |
| Pharmaceuticals        | 2,762.62  | 2,754.09  | 8.53    | 0.31%  | 32         | 521,041.8     | 16.63%          | 369.6             | 12.53%              |
| Fuel & Power           | 1,714.80  | 1,737.12  | -22.32  | -1.28% | 20         | 425,095.9     | 13.57%          | 235.2             | 7.98%               |
| Cement                 | 1,287.58  | 1,297.64  | -10.07  | -0.78% | 7          | 78,303.5      | 2.50%           | 11.2              | 0.38%               |
| Services & Real Estate | 904.84    | 914.51    | -9.67   | -1.06% | 8          | 35,452.7      | 1.13%           | 21.3              | 0.72%               |
| Engineering            | 2,762.93  | 2,775.84  | -12.90  | -0.46% | 39         | 179,946.0     | 5.74%           | 638.9             | 21.67%              |
| Food & Allied          | 14,221.33 | 14,342.30 | -120.97 | -0.84% | 17         | 261,726.3     | 8.35%           | 85.0              | 2.88%               |
| IT                     | 1,753.05  | 1,795.54  | -42.48  | -2.37% | 9          | 19,382.2      | 0.62%           | 68.1              | 2.31%               |
| Textiles               | 1,115.91  | 1,132.32  | -16.41  | -1.45% | 55         | 108,223.7     | 3.45%           | 238.6             | 8.09%               |
| Paper & Printing       | 5,890.91  | 6,007.03  | -116.12 | -1.93% | 3          | 11,262.9      | 0.36%           | 8.1               | 0.27%               |
| Tannery                | 2,193.05  | 2,196.33  | -3.27   | -0.15% | 6          | 23,615.5      | 0.75%           | 79.3              | 2.69%               |
| Jute                   | 14,267.44 | 14,907.91 | -640.47 | -4.30% | 3          | 3,153.2       | 0.10%           | 29.2              | 0.99%               |
| Ceramics               | 533.99    | 526.70    | 7.28    | 1.38%  | 5          | 25,791.2      | 0.82%           | 155.7             | 5.28%               |
| Miscellaneous          | 1,993.83  | 2,002.80  | -8.97   | -0.45% | 13         | 110,631.1     | 3.53%           | 136.3             | 4.62%               |

| Top Ten Gainers                        | Close  | Δ%   | Turnover (mn BDT) |
|--|--------|------|-------------------|
| CAPM IBBL Islamic Mutual Fund          | 11.20  | 9.8% | 66.5              |
| ICB AMCL Third NRB Mutual Fund         | 5.80   | 9.4% | 5.8               |
| ICB Employees Provident MF 1 Scheme 1  | 6.20   | 8.8% | 18.4              |
| Shinepukur Ceramics                    | 14.40  | 8.3% | 3.2               |
| ICB AMCL First Agrani Bank Mutual Fund | 6.70   | 8.1% | 15.6              |
| Dulamia Cotton                         | 45.00  | 7.1% | .0                |
| Atlas Bangladesh Ltd.                  | 139.20 | 7.1% | 60.6              |
| Eastern Cables                         | 301.50 | 6.6% | 82.8              |
| EXIM Bank 1st Mutual Fund              | 4.90   | 6.5% | 1.5               |
| Prime Textile                          | 27.20  | 5.4% | 18.4              |

| Top Ten Losers                | Close  | Δ%    | Turnover (mn BDT) |
|-------------------------------|--------|-------|-------------------|
| First Finance Limited         | 3.50   | -7.9% | .2                |
| Northern Jute                 | 840.60 | -7.5% | 22.4              |
| BIFC                          | 2.80   | -6.7% | .0                |
| SEML FBLSL Growth Fund        | 15.40  | -6.7% | 49.7              |
| United Airways (BD) Ltd.      | 1.60   | -5.9% | 1.8               |
| Tallu Spinning                | 3.40   | -5.6% | .3                |
| Desh Garments                 | 153.00 | -5.3% | 1.6               |
| Alif Industries Limited       | 42.20  | -5.2% | 13.0              |
| Dhaka Insurance Limited       | 37.10  | -5.1% | 10.3              |
| Coppertech Industries Limited | 28.00  | -5.1% | 22.0              |

| Most Traded Share                                  | Close    | Δ%    | Turnover (mn BDT) |
|--|----------|-------|-------------------|
| National Tubes                                     | 186.50   | -1.8% | 209.8             |
| Wata Chemicals Limited                             | 663.00   | 3.8%  | 93.6              |
| Standard Ceramic                                   | 695.10   | 4.2%  | 89.6              |
| Monno Jute Staffers                                | 1,628.90 | 4.6%  | 87.9              |
| United Power Generation & Distribution Company Ltd | 271.00   | -2.7% | 85.1              |
| Eastern Cables                                     | 301.50   | 6.6%  | 82.8              |
| Stylecraft Limited                                 | 731.20   | 0.0%  | 74.7              |
| CAPM IBBL Islamic Mutual Fund                      | 11.20    | 9.8%  | 66.5              |
| Atlas Bangladesh Ltd.                              | 139.20   | 7.1%  | 60.6              |
| Monno Ceramic                                      | 191.20   | 1.8%  | 58.3              |



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| Index | Closing  | Opening  | Δ(Pts) | Δ%     | %ΔYTD  |
|-------|----------|----------|--------|--------|--------|
| DSEX  | 4,894.31 | 4,916.69 | -22.37 | -0.46% | -9.12% |
| DS30  | 1,739.49 | 1,747.68 | -8.19  | -0.47% | -7.51% |
| DSES  | 1,131.37 | 1,134.11 | -2.74  | -0.24% | -8.23% |

|                            | Advanced | Declined | Unchanged | Total |
|----------------------------|----------|----------|-----------|-------|
| <b>All Category</b>        | 74       | 251      | 29        | 354   |
| <b>A Category (Equity)</b> | 62       | 186      | 18        | 266   |
| <b>B Category (Equity)</b> | 4        | 29       | 6         | 39    |
| <b>N Category (Equity)</b> | 1        | 8        | 0         | 9     |
| <b>Z Category (Equity)</b> | 7        | 28       | 5         | 40    |
| <b>Mutual Funds</b>        | 20       | 12       | 5         | 37    |
| <b>Corporate Bonds</b>     | 1        | 0        | 0         | 1     |

| Market Stat | Today     | Last Day    | % Change    |       |
|-------------|-----------|-------------|-------------|-------|
| Mcap        | Mn BDT    | 3,692,278.1 | 3,711,726.0 | -0.5% |
|             | Mn USD    | 44,415.7    | 44,649.7    |       |
| Turnover    | Mn BDT    | 3,019.9     | 3,072.2     | -1.7% |
|             | Mn USD    | 36.3        | 37.0        |       |
| Volume      | Mn Shares | 104.3       | 101.5       | 2.8%  |
| Trade       |           | 104,919     | 99,806      | 5.1%  |

| Top Ten Market Cap                                  | Mcap (mn BDT) | % of Total Mcap | Turnover (mn BDT) | PE    | PB    |
|---|---------------|-----------------|-------------------|-------|-------|
| Grameenphone Ltd.                                   | 460.3         | 14.7%           | 34.43             | 12.6x | 10.9x |
| British American Tobacco Bangladesh Company Limited | 204.2         | 6.5%            | 23.03             | 25.5x | 8.4x  |
| Square Pharmaceuticals                              | 187.9         | 6.0%            | 41.75             | 15.4x | 3.1x  |
| United Power Generation & Distribution Company Ltd  | 142.8         | 4.6%            | 85.12             | 19.3x | 9.7x  |
| Renata Ltd.   | 103.4         | 3.3%            | 8.11              | 30.0x | 6.3x  |
| BRAC Bank   | 75.6          | 2.4%            | 4.29              | 13.6x | 2.0x  |
| Berger Paints                                       | 70.6          | 2.3%            | 6.36              | 31.8x | 10.5x |
| Investment Corporation of Bangladesh                | 67.0          | 2.1%            | .90               | 41.9x | 2.6x  |
| Marico Bangladesh Limited                           | 54.7          | 1.7%            | 1.69              | 23.6x | 37.1x |
| Summit Power  | 44.1          | 1.4%            | 33.33             | 9.0x  | 1.7x  |

| Top Ten Free Float Mcap                             | Free Float Mcap (mn BDT) | % of Total Free Float | Turnover (mn BDT) | PE    | PB    |
|---|--------------------------|-----------------------|-------------------|-------|-------|
| Square Pharmaceuticals                              | 123.2                    | 9.7%                  | 41.75             | 15.4x | 3.1x  |
| British American Tobacco Bangladesh Company Limited | 54.0                     | 4.3%                  | 23.03             | 25.5x | 8.4x  |
| Renata Ltd.   | 50.5                     | 4.0%                  | 8.11              | 30.0x | 6.3x  |
| Grameenphone Ltd.                                   | 46.0                     | 3.6%                  | 34.43             | 12.6x | 10.9x |
| BRAC Bank   | 42.1                     | 3.3%                  | 4.29              | 13.6x | 2.0x  |
| Beximco Pharmaceuticals                             | 29.3                     | 2.3%                  | 10.89             | 11.8x | 1.2x  |
| Olympic Industries                                  | 28.9                     | 2.3%                  | 5.83              | 21.7x | 6.3x  |
| Eastern Bank  | 27.8                     | 2.2%                  | 1.14              | 8.5x  | 1.2x  |
| Islami Bank   | 18.1                     | 1.4%                  | 3.12              | 5.2x  | 0.6x  |
| Pubali Bank   | 17.6                     | 1.4%                  | 1.08              | 6.8x  | 0.9x  |

| Block Trade                          | Maximum Price | Minimum Price | Turnover (mn BDT) | Quantity  | Trade |
|--------------------------------------|---------------|---------------|-------------------|-----------|-------|
| Apex Footwear Limited.               | 265.00        | 265.00        | 17.23             | 65,000    | 2     |
| Atlas Bangladesh Ltd.                | 135.70        | 135.70        | 2.71              | 20,000    | 3     |
| Bank Asia Ltd.                       | 17.00         | 17.00         | 21.51             | 1,265,000 | 1     |
| CAPM IBBL Islamic Mutual Fund        | 10.40         | 10.40         | 0.57              | 55,000    | 1     |
| The Ibn Sina                         | 272.30        | 272.30        | 21.78             | 80,000    | 1     |
| Indo-Bangla Pharmaceuticals Limited  | 20.40         | 20.40         | 0.71              | 35,000    | 1     |
| KDS Accessories Limited              | 49.00         | 49.00         | 0.51              | 10,500    | 1     |
| Navana CNG Limited                   | 48.00         | 48.00         | 0.50              | 10,500    | 1     |
| Salvo Chemical Industry Limited      | 13.70         | 13.70         | 1.23              | 90,000    | 1     |
| Sea Pearl Beach Resort & Spa Limited | 26.60         | 26.60         | 0.53              | 20,000    | 1     |
| Square Pharmaceuticals               | 236.50        | 236.50        | 3.55              | 15,000    | 1     |

## Important DSE News

### NCCBANK

Mr. M. A. Quasem, one of the Sponsors of the Company, has expressed his intention to sell 3,00,000 shares out of his total holding of 54,95,373 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within October 31, 2019.