

Daily Market Update

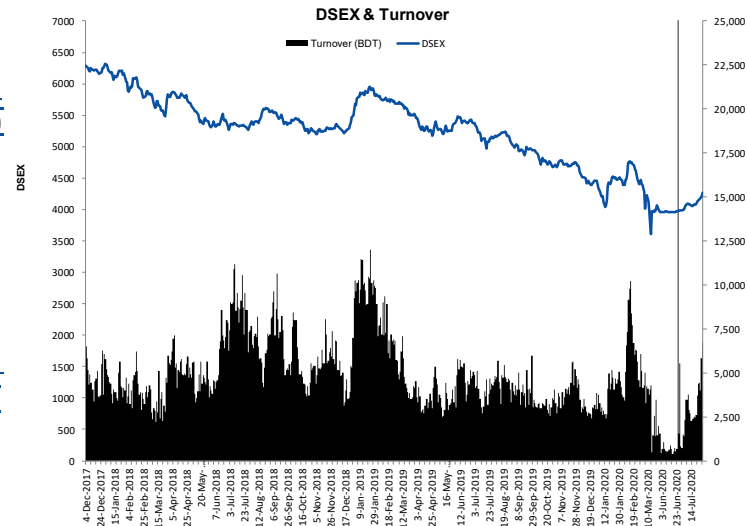
The market closed in green today. The benchmark index DSEX (+1.36%) gained 57.39 points and closed at 4,271.82. The blue-chip index DS30 (+1.56%), the Shariah-based index DSES (+1.70%), and the large cap index CDSET (+1.18%) closed at 1,442.79, 993.14, and 840.09 points respectively. All the large cap sectors posted positive performance today except NBFIs (+0.19%), and Bank (-0.08%). Pharmaceutical booked the highest gain of 2.12% followed by Engineering (+2.04%), Telecommunication (+1.91%), Fuel & Power (+0.97%) and Food & Allied (+0.46%). Block trades contributed 3.4% of the overall market turnover. Square Pharmaceuticals Ltd. (+3.3%) was the most traded share with a turnover of BDT 305 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,140.83	1,141.78	-0.95	-0.08%	30	465,002.6	17.00%	109.0	1.67%
NBFIs	1,419.52	1,416.90	2.62	0.19%	23	131,234.2	4.80%	138.7	2.13%
Mutual Funds	573.75	571.24	2.50	0.44%	37	29,816.7	1.09%	80.7	1.24%
General Insurance	2,257.16	2,178.24	78.92	3.62%	35	60,984.3	2.23%	1,349.3	20.68%
Life Insurance	2,050.21	2,059.92	-9.71	-0.47%	12	57,162.9	2.09%	194.0	2.97%
Telecommunication	3,713.19	3,643.72	69.47	1.91%	2	373,201.6	13.64%	243.4	3.73%
Pharmaceuticals	2,679.21	2,623.54	55.67	2.12%	32	505,031.6	18.46%	1,423.1	21.81%
Fuel & Power	1,507.50	1,492.99	14.50	0.97%	19	373,706.5	13.66%	463.7	7.11%
Cement	1,205.77	1,197.32	8.45	0.71%	7	73,329.7	2.68%	196.2	3.01%
Services & Real Estate	985.96	972.79	13.18	1.35%	8	39,364.7	1.44%	73.8	1.13%
Engineering	2,116.18	2,073.85	42.33	2.04%	39	137,316.6	5.02%	590.8	9.06%
Food & Allied	11,614.73	11,561.61	53.12	0.46%	17	214,484.8	7.84%	276.6	4.24%
IT	2,047.98	1,969.12	78.87	4.01%	9	22,643.0	0.83%	257.0	3.94%
Textiles	1,009.10	1,004.05	5.04	0.50%	56	101,850.7	3.72%	596.2	9.14%
Paper & Printing	6,066.23	5,784.29	281.95	4.87%	4	14,877.1	0.54%	18.1	0.28%
Tannery	1,681.49	1,667.26	14.23	0.85%	6	18,001.5	0.66%	136.4	2.09%
Jute	8,224.49	8,051.14	173.35	2.15%	3	1,817.6	0.07%	20.0	0.31%
Ceramics	392.63	391.40	1.24	0.32%	5	19,907.9	0.73%	43.1	0.66%
Miscellaneous	1,722.01	1,704.08	17.93	1.05%	13	95,548.6	3.49%	313.6	4.81%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Active Fine Chemicals Limited	15.40	10.0%	36.5
Agni Systems Ltd.	19.30	9.7%	36.3
Navana CNG Limited	36.30	10.0%	14.2
BD Welding	20.90	9.9%	3.3
United Insurance	56.40	9.9%	14.3
Agrani Insurance Co. Ltd.	31.10	9.9%	58.1
Silco Pharmaceuticals Limited	24.60	9.8%	127.0
Dragon Sweater & Spinning Ltd.	10.80	2.9%	27.3
In Tech Online Ltd.	21.50	9.7%	12.0
Al-Haj Textile Mills Limited	29.50	9.7%	1.0

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Al-Arafah Islami Bank Ltd	14.80	-8.1%	7.7
Sunlife Insurance Company Limited	16.90	-5.6%	.3
Phoenix Insurance	27.90	-4.8%	11.0
Delta Life Insurance	68.10	-4.6%	12.5
Hamid Fabrics Limited	15.90	-3.6%	6.1
Argon Denims Limited	22.70	-3.4%	20.7
Sinobangla Industries	52.50	-3.3%	23.7
Padma Islami Life Insurance Limited	14.90	-3.2%	.8
Sandhani Life Ins	24.40	-3.2%	11.8
Samorita Hospital	66.90	-2.9%	.8

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Square Pharmaceuticals	187.00	3.3%	304.5
Beximco Pharmaceuticals	85.70	6.2%	299.0
Pioneer Insurance	57.20	4.0%	245.1
Beximco Limited	14.30	6.7%	149.6
Standard Insurance	43.60	9.0%	138.5
Eastern Insurance	78.50	3.6%	134.1
Bangladesh Submarine Cable Company Limited	105.50	1.3%	130.9
Silco Pharmaceuticals Limited	24.60	9.8%	127.0
LafargeHolcim Bangladesh Limited	36.10	0.6%	124.8
Grameenphone Ltd.	263.50	1.9%	112.5



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,271.82	4,214.43	57.39	1.36%	-4.07%
DS30	1,442.79	1,420.64	22.15	1.56%	-4.66%
DSES	993.14	976.50	16.64	1.70%	-0.67%
CDSET	840.09	830.28	9.81	1.18%	-6.63%

	Advanced	Declined	Unchanged	Total
All Category	192	62	101	355
A Category (Equity)	140	48	68	256
B Category (Equity)	25	7	16	48
N Category (Equity)	1	0	0	1
Z Category (Equity)	26	7	17	50
Mutual Funds	11	4	20	35
Corporate Bonds	0	0	1	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,287,907.3	3,257,327.6	
	Mn USD	38,699.5	38,339.5	0.9%
Turnover	Mn BDT	6,723.6	5,809.1	15.7%
	Mn USD	79.1	68.4	
Volume	Mn Shares	241.0	178.7	34.8%
Trade		143,216	121,017	18.3%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	355.8	13.0%	112.51	10.5x	8.4x
British American Tobacco Bangladesh Company Limited	163.4	6.0%	40.28	18.9x	6.7x
Square Pharmaceuticals	157.9	5.8%	304.53	11.5x	2.4x
United Power Generation & Distribution Company Ltd	116.4	4.3%	30.66	16.2x	7.9x
Renata Ltd.	97.3	3.6%	9.17	22.7x	5.4x
Berger Paints	60.7	2.2%	7.19	25.1x	9.1x
Investment Corporation of Bangladesh	54.9	2.0%	7.47	NM	2.6x
Marico Bangladesh Limited	54.4	2.0%	18.39	19.5x	37.0x
Summit Power	42.9	1.6%	80.63	7.6x	1.6x
BRAC Bank	42.3	1.5%	2.56	9.4x	0.9x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	103.3	9.3%	304.53	11.5x	2.4x
Renata Ltd.	47.5	4.3%	9.17	22.7x	5.4x
British American Tobacco Bangladesh Company Limited	43.2	3.9%	40.28	18.9x	6.7x
Grameenphone Ltd.	35.6	3.2%	112.51	10.5x	8.4x
Beximco Pharmaceuticals	30.2	2.7%	298.99	10.2x	1.2x
Olympic Industries	25.3	2.3%	21.00	17.3x	5.6x
BRAC Bank	23.6	2.1%	2.56	9.4x	0.9x
Eastern Bank	17.2	1.5%	3.55	6.3x	0.9x
Summit Power	15.8	1.4%	80.63	7.6x	1.6x
Pubali Bank	15.1	1.4%	.21	9.8x	0.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Baraka Power Limited	25.50	25.50	25.50	1,000,000	1
British American Tobacco Bangladesh Company Limited	905.00	898.00	4.30	4,772	5
Bangladesh General Insurance Co.	24.80	24.80	29.37	1,184,254	2
BRAC Bank	28.80	28.80	22.42	778,600	9
Beximco Pharmaceuticals	78.50	78.50	7.85	100,000	1
Chittagong Vegetable	115.00	115.00	0.92	8,000	1
Eastern Insurance	83.20	76.00	1.00	12,589	2
Genex Infosys Limited	58.00	58.00	2.90	50,000	1
ICB AMCL 2nd MF	8.00	8.00	2.22	276,917	1
IFIC Bank	9.40	9.30	3.66	391,300	3
Kay and Que	207.40	207.40	11.82	57,000	1
Lankabangla Finance	11.70	11.70	0.59	50,000	1
LafargeHolcim Bangladesh Limited	32.60	32.60	1.32	40,500	1
Mercantile Bank	11.50	11.50	4.29	372,750	1
Nahee Aluminium Composite Panel Ltd.	56.20	56.20	0.56	10,000	1
Navana CNG Limited	34.00	34.00	2.94	86,525	1
Paramount Insurance	97.50	97.00	2.55	26,171	2
The Peninsula Chittagong Limited	17.10	17.10	0.68	39,500	1
Phoenix Finance	22.70	22.70	0.51	22,280	1
The Premier Bank	9.90	9.00	4.42	454,500	3
Paramount Textile Limited	56.20	56.20	2.81	50,000	1
Republic Insurance	29.50	29.50	0.59	20,000	1
Saiham Cotton Mills Limited	15.20	15.10	14.85	980,000	5
S. Alam Cold Rolled Steels	21.00	21.00	0.63	30,000	1
Sea Pearl Beach Resort & Spa Limited	79.00	75.00	5.31	69,252	7
Singer Bangladesh	147.00	132.30	11.18	83,687	12
SK Trims & Industries Limited	62.20	56.00	16.33	281,556	26
Square Pharmaceuticals	186.80	184.00	13.91	75,000	9
Standard Ceramic	303.00	293.00	1.50	5,000	2
Standard Insurance	36.00	36.00	0.50	13,900	1

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Takaful Insurance	36.00	36.00	0.72	20,000	1
VFS Thread Dyeing Limited	20.60	20.60	0.52	25,000	1
Total			198.64		106

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
GP	Grameenphone Ltd.		0.0%	130.0%	31-Dec-19	05-Aug-20
MIDASFIN	MIDAS Financing Ltd.		2.5%	2.5%	31-Dec-19	05-Aug-20
PROVATIINS	Provati Insurance Co. Ltd.		0.0%	12.0%	31-Dec-19	05-Aug-20
EASTLAND	Eastland Insurance Company Ltd.		5.0%	5.0%	31-Dec-19	06-Aug-20
CITYGENINS	City General Insurance Co. Ltd.		0.0%	5.0%	31-Dec-19	06-Aug-20
RUPALIINS	Rupali Insurance Company Ltd.		0.0%	10.0%	31-Dec-19	06-Aug-20
ASIAINS	Asia Insurance Limited		0.0%	10.0%	31-Dec-19	09-Aug-20
NBL	National Bank Ltd.		5.0%	5.0%	31-Dec-19	09-Aug-20
NCCBANK	National Credit and Commerce Bank Ltd.		2.0%	15.0%	31-Dec-19	10-Aug-20
ABBANK	AB Bank Limited		5.0%	0.0%	31-Dec-19	10-Aug-20

Important DSE News

BRACBANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.24 for April-June 2020 as against Tk. 0.98 for April-June 2019; Consolidated EPS was Tk. 0.95 for January-June 2020 as against Tk. 2.02 for January-June 2019. Consolidated NOCFPS was Tk. 27.57 for January-June 2020 as against Tk. 9.30 for January-June 2019. Consolidated NAV per share was Tk. 33.22 as on June 30, 2020 and Tk. 30.61 as on June 30, 2019.

UNIONCAP

The Board of Directors has recommended No dividend for the year ended on December 31, 2019. Date of AGM: 17.09.2020, Time: 11:00 AM, Venue: Virtually by using Digital Platform. Record date: 24.08.2020. The Company has also reported Consolidated EPS of Tk. (6.13), Consolidated NAV per Share of Tk. 7.21 and Consolidated NOCFPS of Tk. (4.93) for the year ended on December 31, 2019 as against Tk. 0.54 (restated), Tk. 13.34 (restated) and Tk. 1.25 (restated) respectively for the same period of the previous year.

The Company will be placed in 'Z' category from existing 'B' category with effect from August 04, 2020 as the Company has recommended No dividend for the year ended on December 31, 2019.

(Q1 Un-audited): Consolidated EPS was Tk. (0.12) for January-March 2020 as against Tk. 0.05 for January-March 2019. Consolidated NOCFPS was Tk. 1.32 for January-March 2020 as against Tk. (3.30) for January-March 2019. Consolidated NAV per share was Tk. 7.08 as on March 31, 2020 and Tk. 7.21 as on December 31, 2019.

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(Q2 Un-audited): Consolidated EPS was Tk. (1.28) for April-June 2020 as against Tk. 0.00 for April-June 2019; Consolidated EPS was Tk. (1.40) for January-June 2020 as against Tk. 0.06 for January-June 2019. Consolidated NOCFPS was Tk. (2.04) for January-June 2020 as against Tk. 0.58 for January-June 2019. Consolidated NAV per share was Tk. 5.81 as on June 30, 2020 and Tk. 7.21 as on December 31, 2019.

GREENDEL

(Q2 Un-audited): Consolidated EPS was Tk. 0.65 for April-June 2020 as against Tk. 0.41 for April-June 2019; Consolidated EPS was Tk. 1.63 for January-June 2020 as against Tk. 1.24 for January-June 2019. Consolidated NOCFPS was Tk. 1.44 for January-June 2020 as against Tk. 1.52 for January-June 2019. Consolidated NAV per share was Tk. 70.43 as on June 30, 2020 and Tk. 68.33 as on December 31, 2019.

PADMALIFE

The Board of Directors has recommended no dividend for the year ended on December 31, 2019. Date of AGM: 26.09.2020, Time: 11:00 AM, Venue: Digital Platform. Record Date: 24.08.2020.

(Q1 Un-audited): Decrease in life revenue account for Jan-Mar, 2020 was Tk. 86.96 million with total life insurance fund of Tk. 122.83 million as against decrease in life revenue account of Tk. 197.86 million and Tk. 256.11 million respectively for the same period of the previous year.

(Q2 Un-audited): Decrease in life revenue account for Apr-June, 2020 was Tk. 18.58 million with total life insurance fund of Tk. 104.25 million as against decrease in Tk. 163.43 million and Tk. 92.68 million respectively for the same period of the previous year. Decrease in life revenue account for Jan-June, 2020 was Tk. 105.54 million with total life insurance fund of Tk. 104.25 million as against decrease in Tk. 361.29 million and Tk. 92.68 million respectively for the same period of the previous year.

NBL

(Q2 Un-audited): Consolidated EPS was Tk. 0.05 for April-June 2020 as against Tk. 0.23 for April-June 2019; Consolidated EPS was Tk. 0.36 for January-June 2020 as against Tk. 0.38 for January-June 2019. Consolidated NOCFPS was Tk. (6.66) for January-June 2020 as against (1.30) for January-June 2019. Consolidated NAV per share was Tk. 17.07 as on June 30, 2020 and Tk. 16.68 as on December 31, 2019.

ASIAPACINS

(Q2 Un-audited): EPS was Tk. 0.69 for April-June 2020 as against Tk. 0.47 for April-June 2019; EPS was Tk. 1.51 for January-June 2020 as against Tk. 1.28 for January-June 2019. NOCFPS was Tk. 1.71 for January-June 2020 as against Tk. 0.64 for January-June 2019. NAV per share was Tk. 21.17 as on June 30, 2020 and 19.24 as on June 30, 2019.

CONFIDCEM

(Q3 Un-audited): Consolidated EPS was Tk. 2.78 for January-March 2020 as against Tk. 2.20 (Solo) for January-March 2019; Consolidated EPS was Tk. 7.90 for July 2019-March 2020 as against Tk. 4.15 (Solo) for July 2018-March 2019. Consolidated NOCFPS was Tk. 5.19 for July 2019-March 2020 as against Tk. (4.61) (Solo) for July 2018-March 2019. Consolidated NAV per share was Tk. 76.91 as on March 31, 2020 and Tk. 67.24 (Solo) as on June 30, 2019.

JAMUNABANK

Mr. Golam Dastagir Gazi, Bir Protik, one of the Sponsors of the Company, has expressed his intention to transfer 98,79,000 shares out of his total holding of 1,49,85,979 shares to his son Mr. Gazi Golam Ashria, by way of gift outside the trading system of the Exchange within 30 working days from the date of issuance of approval letter by DSE.