

Daily Market Update

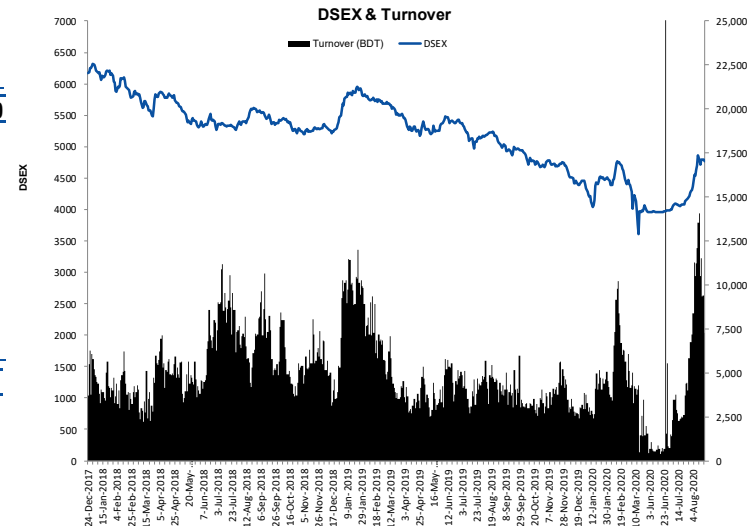
The market closed in red today. The benchmark index DSEX (-0.68%) lost 32.48 points and closed at 4,762.44. The blue-chip index DS30 (-0.32%), the Shariah-based index DSES (-0.29%), and the large-cap index CDSET (-0.35%) closed at 1,645.73, 1,104.30, and 961.04 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 1.70% followed by Food & Allied (+1.45%), and Pharmaceutical (+0.18%). NBFIs experienced the highest loss of 3.35% followed by Food & Allied (-0.91%), Engineering (-0.86%), and Fuel & Power (-0.20%). Block trades contributed 4.2% of the overall market turnover. Bangladesh Export Import Company Ltd. (-1.2%) was the most traded share with a turnover of BDT 528 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover (mn BDT)	% of Total Turnover
Banks	1,291.53	1,303.35	-11.82	-0.91%	30	526,447.5	17.20%	736.3	10.54%
NBFIs	1,726.15	1,785.95	-59.80	-3.35%	23	159,584.5	5.21%	150.7	2.16%
Mutual Funds	653.93	652.27	1.66	0.26%	37	33,983.9	1.11%	244.3	3.50%
General Insurance	2,387.51	2,395.91	-8.40	-0.35%	36	64,506.6	2.11%	592.0	8.48%
Life Insurance	1,931.67	1,988.34	-56.67	-2.85%	12	53,857.9	1.76%	73.4	1.05%
Telecommunication	4,245.25	4,174.47	70.77	1.70%	2	426,677.1	13.94%	301.5	4.32%
Pharmaceuticals	3,009.62	3,004.20	5.43	0.18%	32	567,318.4	18.53%	1,412.8	20.23%
Fuel & Power	1,669.76	1,673.16	-3.40	-0.20%	19	413,931.2	13.52%	552.1	7.91%
Cement	1,346.71	1,352.47	-5.76	-0.43%	7	81,900.8	2.68%	244.7	3.50%
Services & Real Estate	1,007.21	1,018.59	-11.37	-1.12%	8	40,213.1	1.31%	44.8	0.64%
Engineering	2,316.40	2,336.39	-19.99	-0.86%	39	150,308.3	4.91%	588.8	8.43%
Food & Allied	12,889.77	12,705.54	184.24	1.45%	17	238,031.9	7.78%	353.9	5.07%
IT	2,071.87	2,114.31	-42.44	-2.01%	9	22,907.0	0.75%	118.0	1.69%
Textiles	1,086.34	1,098.90	-12.56	-1.14%	56	109,647.8	3.58%	561.7	8.04%
Paper & Printing	5,958.77	6,001.54	-42.77	-0.71%	4	14,884.8	0.49%	30.8	0.44%
Tannery	1,721.92	1,702.50	19.42	1.14%	6	18,434.4	0.60%	40.0	0.57%
Jute	9,691.29	9,509.26	182.03	1.91%	3	2,141.8	0.07%	44.9	0.64%
Ceramics	433.33	439.43	-6.10	-1.39%	5	21,971.2	0.72%	69.8	1.00%
Miscellaneous	2,066.92	2,076.53	-9.61	-0.46%	13	114,686.8	3.75%	823.2	11.79%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Express Insurance Limited	15.00	50.0%	1.3
NCCBL Mutual Fund - 1	6.60	10.0%	4.8
Shaympur Sugar	72.70	10.0%	.5
Zeal Bangla Sugar Mills	182.00	10.0%	2.6
Jute Spinners	125.10	9.9%	.6
Queen South Textiles Mills Limited	31.40	9.8%	58.7
Miracle Ind.	20.70	9.5%	23.0
SEML Lecture Equity Management Fund	6.90	9.5%	21.2
CAPM IBBL Islamic Mutual Fund	10.40	9.5%	25.6
Imam Button	35.10	9.3%	8.2

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Familytex (BD) Limited	2.80	-9.7%	6.1
First Finance Limited	5.80	-9.4%	.2
Dacca Dyeing	7.00	-9.1%	1.5
Tung Hai Knitting & Dyeing Limited	3.00	-9.1%	1.4
Appollo Ispat Complex Limited	4.90	-7.5%	5.4
Shinepukur Ceramics	13.80	-7.4%	5.8
Generation Next Fashions Limited	3.80	-7.3%	7.7
Asia Pacific General Insurance Co. Ltd.	32.60	-6.9%	24.4
Keya Cosmetics	4.30	-6.5%	13.3
AB Bank Limited	8.70	-6.5%	9.6

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Beximco Limited	24.70	-1.2%	528.3
Beximco Pharmaceuticals	107.80	-2.6%	410.6
Grameenphone Ltd.	299.50	1.9%	225.9
Orion Pharma Ltd.	57.90	-4.1%	224.5
IFIC Bank	11.50	-0.9%	207.4
LafargeHolcim Bangladesh Limited	42.30	0.2%	191.8
British American Tobacco Bangladesh Company Limited	1,020.60	2.3%	180.7
Square Pharmaceuticals	210.30	0.5%	175.7
BRAC Bank	36.10	-2.2%	157.9
Baraka Power Limited	32.00	-0.9%	122.7



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,762.44	4,794.92	-32.48	-0.68%	6.95%
DS30	1,645.73	1,650.99	-5.25	-0.32%	8.75%
DSES	1,104.30	1,107.53	-3.23	-0.29%	10.45%
CDSET	961.04	964.45	-3.41	-0.35%	6.81%

	Advanced	Declined	Unchanged	Total
All Category	89	232	33	354
A Category (Equity)	61	170	25	256
B Category (Equity)	11	30	5	46
N Category (Equity)	1	1	0	2
Z Category (Equity)	16	31	3	50
Mutual Funds	13	15	9	37
Corporate Bonds	1	1	0	2

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,611,040.8	3,616,839.8	-0.2%
	Mn USD	42,502.8	42,571.1	
Turnover	Mn BDT	7,293.7	9,379.9	-22.2%
	Mn USD	85.8	110.4	
Volume	Mn Shares	259.5	347.8	-25.4%
Trade		164,788	187,983	-12.3%

Top Twenty Market Cap	Mcap (Bn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	404.4	13.2%	225.90	11.9x	9.5x
British American Tobacco Bangladesh Company Limited	183.7	6.0%	180.71	21.2x	7.6x
Square Pharmaceuticals	177.5	5.8%	175.69	12.9x	2.7x
United Power Generation & Distribution Company Ltd	134.1	4.4%	20.61	18.7x	9.1x
Renata Ltd.	104.8	3.4%	11.11	24.5x	5.8x
Investment Corporation of Bangladesh	74.7	2.4%	14.08	NM	3.6x
Berger Paints	69.0	2.3%	19.43	28.5x	10.3x
Marico Bangladesh Limited	63.2	2.1%	32.90	22.6x	42.9x
LafargeHolcim Bangladesh Limited	49.1	1.6%	191.83	27.3x	3.2x
BRAC Bank	47.9	1.6%	157.91	10.6x	1.1x
Summit Power	44.9	1.5%	47.82	7.9x	1.7x
Beximco Pharmaceuticals	43.7	1.4%	410.63	12.8x	1.6x
Islami Bank	37.4	1.2%	21.82	6.8x	0.6x
Titas Gas	36.2	1.2%	52.46	9.3x	0.6x
Olympic Industries	36.0	1.2%	12.17	17.8x	5.7x
Dutch-Bangla Bank	35.5	1.2%	21.82	7.7x	1.1x
Eastern Bank	30.0	1.0%	5.21	7.6x	1.1x
Glaxo Smithkline	28.0	0.9%	3.99	49.1x	22.3x
MJL Bangladesh Limited	26.8	0.9%	18.85	14.5x	4.2x
National Life Insurance Company Ltd.	24.8	0.8%	10.38	NM	22.8x

Top Twenty Free Float Mcap	Free Float Mcap (Bn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	116.2	9.4%	175.69	12.9x	2.7x
Renata Ltd.	51.2	4.1%	11.11	24.5x	5.8x
British American Tobacco Bangladesh Company Limited	48.6	3.9%	180.71	21.2x	7.6x
Grameenphone Ltd.	40.4	3.3%	225.90	11.9x	9.5x
Beximco Pharmaceuticals	38.0	3.1%	410.63	12.8x	1.6x
BRAC Bank	26.7	2.2%	157.91	10.6x	1.1x
Olympic Industries	26.0	2.1%	12.17	17.8x	5.7x
Eastern Bank	20.6	1.7%	5.21	7.6x	1.1x
Islami Bank	19.1	1.5%	21.82	6.8x	0.6x
LafargeHolcim Bangladesh Limited	17.4	1.4%	191.83	27.3x	3.2x
Beximco Limited	17.3	1.4%	528.27	22.9x	0.4x
Summit Power	16.5	1.3%	47.82	7.9x	1.7x
National Bank	16.5	1.3%	14.64	5.2x	0.5x
Pubali Bank	16.3	1.3%	3.55	10.8x	0.8x
City Bank	15.5	1.2%	57.48	8.2x	0.9x
Beacon Pharmaceuticals Limited	14.1	1.1%	55.98	175.5x	6.9x
United Power Generation & Distribution Company Ltd	13.4	1.1%	20.61	18.7x	9.1x
Southeast Bank	12.1	1.0%	53.83	5.1x	0.5x
IFIC Bank	11.7	0.9%	207.40	6.4x	0.6x
Prime Bank	11.1	0.9%	1.72	10.5x	0.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
ACI Limited	272.50	272.50	7.36	27,000	1
Agrani Insurance Co. Ltd.	35.30	35.30	1.89	53,565	1
Baraka Power Limited	32.50	31.00	33.60	1,080,000	2
Beximco Limited	26.40	25.20	19.66	747,000	4
CAPM IBBL Islamic Mutual Fund	10.10	9.40	5.45	572,000	3
City Bank	22.50	22.50	2.25	100,000	1
Delta Brac Housing	92.50	87.00	40.44	437,544	4
Eastern Insurance	82.00	82.00	0.50	6,100	1

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Fine Foods Ltd	63.90	63.90	0.51	8,000	1
Golden Harvest Agro Industries Ltd.	19.30	19.30	0.97	50,000	1
LafargeHolcim Bangladesh Limited	45.80	45.00	66.03	1,453,400	5
M.L. Dyeing Limited	49.10	48.00	2.19	44,998	3
Navana CNG Limited	43.60	43.60	4.45	102,000	2
NCC Bank	14.50	14.50	10.15	700,000	1
Orion Infusion	79.30	78.60	1.60	20,300	2
Orion Pharma Ltd.	65.80	65.80	73.07	1,110,527	3
Pioneer Insurance	64.00	64.00	1.02	16,000	1
Paramount Textile Limited	57.00	57.00	2.00	35,000	2
Rupali Life Insurance Co. Ltd.	55.90	55.90	2.80	50,000	1
Saiham Textile	27.30	27.30	1.50	55,000	1
Sea Pearl Beach Resort & Spa Limited	78.80	71.20	3.06	41,284	5
SK Trims & Industries Limited	65.40	59.20	11.86	195,000	9
Sonar Bangla Ins	48.30	48.30	1.11	23,000	1
Southeast Bank	13.50	13.50	2.97	220,110	1
Square Pharmaceuticals	208.90	208.90	5.44	26,030	1
Standard Bank	9.00	9.00	0.90	100,000	1
Uttara Bank	24.00	24.00	6.90	287,506	1
Total			309.67		59

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
SONARBAINS	Sonar Bangla Insurance Company Limited	-	0.0%	10.0%	31-Dec-19	25-Aug-20
EDERALINS	Federal Insurance Co. Ltd.	-	0.0%	5.0%	31-Dec-19	27-Aug-20
NATLIFEINS	National Life Insurance Company Ltd.	-	0.0%	28.0%	31-Dec-19	31-Aug-20
BDWELDING	Bangladesh Welding Electrodes Ltd.	-	1.0%	0.0%	31-Dec-19	31-Aug-20
SEMLFBSLGF	SEML FBSL Growth Fund	-	0.0%	2.5%	30-Jun-20	01-Sep-20
SANDHANINS	Sandhani Life Insurance Company Ltd.	-	0.0%	12.0%	31-Dec-19	01-Sep-20

Important DSE News

UTTARAFIN

The Board of Directors has recommended 15% cash and 5% stock dividend for the year ended on December 31, 2019. Date of AGM: 30.09.2020, Time: 11:00 AM, Venue: Digital Platform. Record Date: 15.09.2020. The Company has also reported Consolidated EPS of Tk. 9.45, Consolidated NAV per share of Tk. 62.45 and Consolidated NOCFPS of Tk. 2.73 for the year ended on December 31, 2019 as against Tk. 8.27, Tk. 55.00 and Tk. (20.90) respectively for the same period of the previous year.

(Q1 Un-audited): Consolidated EPS was Tk. 1.77 for January-March 2020 as against Tk. 3.04 for January-March 2019. Consolidated NOCFPS was Tk. 4.25 for January-March 2020 as against Tk. 9.97 for January-March 2019. Consolidated NAV per share was Tk. 64.22 as on March 31, 2020 and Tk. 62.45 as on December 31, 2019.

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(Q2 Un-audited): Consolidated EPS was Tk. 1.10 for April-June 2020 as against Tk. 3.43 for April-June 2019; Consolidated EPS was Tk. 2.87 for January-June 2020 as against Tk. 6.05 for January-June 2019. Consolidated NOCFPS was Tk. 7.47 for January-June 2020 as against Tk. 8.14 for January-June 2019. Consolidated NAV per share was Tk. 65.32 as on June 30, 2020 and Tk. 62.45 as on December 31, 2019.

EIL

Trading of the shares of Express Insurance Limited will commence at DSE from today i.e. August 24, 2020 under 'N' category. DSE Trading Code for Express Insurance Limited is "EIL" and DSE Company Code is 25748.

(Q2 Un-audited): As per un-audited Q2 financial statements, profit after tax was Tk. 17.41 million and basic EPS of Tk. 0.45 for the 3 (three) months (April □ June 2020) period ended on 30 June 2020 against profit after tax of Tk. 8.00 million and basic EPS of Tk. 0.20 for the same period of the previous year. However, Post-IPO basic EPS for the 3 (three) months (April □ June 2020) period ended on 30 June 2020 would be Tk. 0.27. Moreover, profit after tax was Tk. 32.44 million and basic EPS of Tk. 0.83 for the 6 (six) months (January □ June 2020) period ended on 30 June 2020 against profit after tax of Tk. 28.89 million and basic EPS of Tk. 0.74 for the same period of the previous year. However, Post-IPO EPS would be Tk. 0.50 for 6 (six) months (January- June 2020) period ended on 30 June 2020. Pre-IPO Net Asset Value (NAV) per share (considering Pre-IPO paid up shares) would be Tk. 18.46 as on 30 June 2020 and the same would be Tk. 15.08 (considering Post-IPO paid up shares). Pre-IPO paid-up number of shares for 3 (three) months (April-June 2020) and 6 (six) months (January- June 2020) period ended on 30 June 2020 was 39,118,464 which was same for the same period of the previous year and Post-IPO paid-up number of shares would be 65,197,464.

MERCANBANK

Dhaka Stock Exchange Limited (DSE) has accorded its consent as per Court Order to transfer 40,55,283 shares of Mercantile Bank Ltd. from Md. Shahabuddin Alam, one of the Sponsors of Mercantile Bank Ltd. (the transferor/pledgor) to Southeast Bank Ltd. (the transferee/pledgee) outside the trading system of the exchange within 30 working days from the date of issuance of approval letter by DSE, under Regulation-47 of the Dhaka Stock Exchange (Listing) Regulations, 2015.