

Daily Market Update

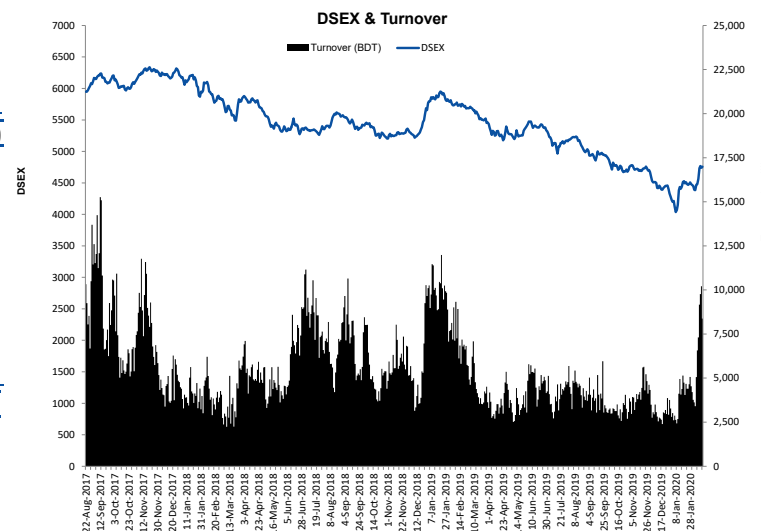
Market closed in green today. The benchmark index DSEX (+0.37%) gained 17.61 points and closed at 4,758.01 points. The blue chip index DS30 (+0.55%), the large cap index CDSET (+0.62%) and the Shariah-based index DSES (+0.52%) all closed in green. Large cap sectors showed mixed performance today. Telecommunication booked the highest gain of 7.35% followed by Fuel & Power (+3.00%) and Engineering (+2.76%). NBFIs experienced the highest loss of -1.07% followed by Food & Allied (-0.96%), Banks (-0.88%) and Pharmaceuticals (-0.30%). Turnover stood at BDT 8.4 billion (USD 100.7 million). Summit Power (+1.4%) was the most traded share with a turnover of BDT 300.6 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,306.51	1,318.17	-11.66	-0.88%	30	532,533.1	17.61%	361.0	4.45%
NBFIs	1,651.43	1,669.29	-17.86	-1.07%	23	152,674.0	5.05%	178.1	2.20%
Mutual Funds	678.45	667.89	10.56	1.58%	37	35,257.9	1.17%	277.2	3.42%
General Insurance	1,956.69	1,978.99	-22.30	-1.13%	35	52,866.2	1.75%	380.5	4.69%
Life Insurance	2,175.45	2,175.57	-0.12	-0.01%	12	60,654.8	2.01%	281.0	3.47%
Telecommunication	3,998.89	3,725.15	273.74	7.35%	2	401,916.6	13.29%	256.8	3.17%
Pharmaceuticals	2,679.94	2,688.01	-8.08	-0.30%	32	505,447.7	16.71%	1,101.1	13.58%
Fuel & Power	1,728.77	1,678.38	50.38	3.00%	19	428,558.5	14.17%	1,151.1	14.20%
Cement	1,499.38	1,503.53	-4.14	-0.28%	7	91,185.9	3.02%	283.9	3.50%
Services & Real Estate	1,060.85	1,044.13	16.72	1.60%	8	42,354.4	1.40%	115.6	1.43%
Engineering	2,483.90	2,417.12	66.77	2.76%	39	161,795.1	5.35%	1,238.8	15.28%
Food & Allied	13,741.25	13,873.75	-132.50	-0.96%	17	253,754.4	8.39%	320.7	3.96%
IT	2,089.28	2,094.35	-5.07	-0.24%	9	23,099.6	0.76%	208.3	2.57%
Textiles	1,163.70	1,165.97	-2.27	-0.19%	56	117,454.8	3.88%	1,024.1	12.63%
Paper & Printing	5,869.11	5,723.31	145.79	2.55%	3	11,221.2	0.37%	79.6	0.98%
Tannery	1,976.54	1,951.66	24.88	1.27%	6	21,160.3	0.70%	100.3	1.24%
Jute	10,401.42	10,177.75	223.68	2.20%	3	2,298.8	0.08%	89.6	1.10%
Ceramics	483.95	485.63	-1.68	-0.35%	5	24,538.1	0.81%	107.2	1.32%
Miscellaneous	1,902.76	1,896.58	6.18	0.33%	13	105,578.0	3.49%	553.7	6.83%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
ICB AMCL Third NRB Mutual Fund	6.60	10.0%	11.4
BSRM Steel	43.10	9.9%	46.8
Hakkani Pulp & Paper	68.70	9.9%	26.4
Bangladesh Steel Re-Rolling Mills Limited	62.20	9.9%	94.3
Global Heavy Chemicals Limited	33.90	9.7%	5.6
Alif Industries Limited	35.90	9.5%	93.4
IFIL Islamic Mutual Fund-1	7.00	9.4%	8.4
Prime Bank 1st ICB AMCL Mutual Fund	7.00	9.4%	20.2
Regent Textile Mills Limited	10.80	9.1%	26.3
Kohinoor Chemicals	452.60	8.7%	33.6

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
United Airways (BD) Ltd.	1.50	-6.3%	1.1
Saiham Textile	41.50	-4.8%	34.8
Familytex (BD) Limited	2.00	-4.8%	2.8
Islami Insurance	27.50	-4.5%	34.7
Tung Hai Knitting & Dyeing Limited	2.30	-4.2%	.4
Jute Spinners	80.90	-4.1%	.2
Provati Insurance	28.80	-4.0%	13.0
BIFC	2.50	-3.8%	.0
FAS Finance & Investments Limited	5.10	-3.8%	13.8
Alltex Industries Ltd.	8.70	-3.3%	.4

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Summit Power	44.70	1.4%	300.6
Orion Pharma Ltd.	47.90	3.9%	231.9
LafargeHolcim Bangladesh Limited	47.70	-2.5%	211.0
Khulna Power Company Limited	57.80	0.9%	197.8
SK Trims & Industries Limited	70.30	8.3%	185.2
Grameenphone Ltd.	284.90	7.7%	185.1
National Tubes	130.80	1.9%	142.3
Doreen Power Generations and Systems Limited	70.80	6.5%	136.2
Beximco Limited	17.40	1.2%	117.9
Golden Harvest Agro Industries Ltd.	21.40	-0.5%	116.6



Associate:
Md. Rafiqul Islam
 (880)1708805229
mrafiqulislam@bracepl.com

Associate:
Md. Mahirul Quddus
 (880)1709636546
mmahirul.quddus@bracepl.com

Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,758.01	4,740.40	17.61	0.37%	6.85%
DS30	1,599.56	1,590.88	8.68	0.55%	5.70%
DSES	1,087.02	1,081.34	5.68	0.52%	8.72%
CDSET	956.97	951.05	5.92	0.62%	6.36%

	Advanced	Declined	Unchanged	Total
All Category	143	180	33	356
A Category (Equity)	103	135	21	259
B Category (Equity)	20	25	3	48
N Category (Equity)	0	2	0	2
Z Category (Equity)	20	18	9	47
Mutual Funds	21	6	10	37
Corporate Bonds	2	0	0	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,596,562.6	3,561,602.3	
	Mn USD	43,264.3	42,843.8	1.0%
Turnover	Mn BDT	8,371.5	10,213.4	-18.0%
	Mn USD	100.7	122.9	
Volume	Mn Shares	291.3	382.9	-23.9%
Trade		198,135	221,329	-10.5%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	384.7	12.7%	185.07	11.1x	9.1x
British American Tobacco Bangladesh Company Limited	195.8	6.5%	73.54	22.7x	8.1x
Square Pharmaceuticals	173.5	5.7%	76.48	13.1x	2.6x
United Power Generation & Distribution Company Ltd	140.9	4.7%	75.13	17.3x	9.6x
Renata Ltd.	98.4	3.3%	16.47	24.3x	5.4x
Investment Corporation of Bangladesh	66.5	2.2%	6.38	NM	3.2x
Berger Paints	65.7	2.2%	8.10	27.0x	9.8x
BRAC Bank	59.8	2.0%	55.48	11.6x	1.5x
LafargeHolcim Bangladesh Limited	55.4	1.8%	211.03	30.8x	3.6x
Marico Bangladesh Limited	52.7	1.7%	8.73	20.2x	35.8x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	113.8	9.3%	76.48	13.1x	2.6x
British American Tobacco Bangladesh Company Limited	51.8	4.2%	73.54	22.7x	8.1x
Renata Ltd.	48.1	3.9%	16.47	24.3x	5.4x
Grameenphone Ltd.	38.5	3.1%	185.07	11.1x	9.1x
BRAC Bank	33.3	2.7%	55.48	11.6x	1.5x
Olympic Industries	29.0	2.4%	12.73	20.1x	6.4x
Beximco Pharmaceuticals	26.7	2.2%	22.06	9.4x	1.1x
Eastern Bank	19.8	1.6%	.60	8.8x	1.2x
LafargeHolcim Bangladesh Limited	19.6	1.6%	211.03	30.8x	3.6x
Pubali Bank	17.7	1.4%	3.30	6.8x	0.9x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
BBS Cables Limited	67.90	67.90	3.40	50,000	1
Beacon Pharmaceuticals Limited	51.50	51.50	198.64	3,857,000	1
Fine Foods Ltd	49.00	49.00	2.45	50,000	1
Fortune Shoes Limited	22.70	22.70	1.92	84,745	1
M.L. Dyeing Limited	54.00	53.00	6.43	120,000	2
Mutual Trust Bank	29.90	29.90	2.99	100,000	1
National Housing Fin. and Inv. Ltd.	34.00	34.00	1.61	47,430	1
Progressive Life Ins	131.00	130.00	17.68	135,501	3
SK Trims & Industries Limited	66.00	62.50	5.80	90,000	3
Square Pharmaceuticals	205.30	205.30	5.13	25,000	1
Unique Hotel & Resorts Limited	48.50	47.50	8.24	172,352	2
United Power Generation & Distribution Company Ltd	258.00	258.00	7.80	30,225	8
Wata Chemicals Limited	379.50	379.50	0.57	1,500	1

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
1STPRIMFMF	Prime Finance First Mutual Fund		0.0%	7.0%	31-Dec-2019	20-Feb-2020
SUMITPOWER	Summit Power Limited		0.0%	15.0%	30-Jun-2020	24-Feb-2020
RAKCERAMIC	RAK Ceramics (Bangladesh) Limited		0.0%	15.0%	31-Dec-2019	25-Feb-2020
BEACHHATCH	Beach Hatchery Ltd.		0.0%	0.0%	30-Jun-2019	9-Jan-2020

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.

Important DSE News

PTL

Paramount Insurance Company Ltd. (where Mrs. Anita Haque, Mrs. Anita Das, Mr. A. H. M. Habibur Rahman, Mr. A. H. M. Abdur Rahman and Mr. Md. Jahangir Yahya are Directors of both Paramount Insurance Company Limited and Paramount Textile Ltd.) has expressed its intention to buy 3,00,000 shares of Paramount Textile Ltd. at prevailing market price (in the Public market) through Stock Exchange (DSE).

AFCAGRO

Referring to their earlier news disseminated on 02.12.2019, the Company has further informed that BSEC has accorded consent under the provision of the Securities and Exchange Commission (Private Placement of Debt Securities) Rules, 2012 for issuance of Non-Convertible Zero Coupon Bond amounting to Tk. 100.00 crore only. The consent has been accorded subject to the condition that the Company shall comply with the relevant laws and Regulatory Requirements, and also shall adhere to the conditions imposed by BSEC under Section 2CC of the Securities and Exchange Ordinance, 1969.

ALIF

(Q2 Un-audited): EPS was Tk. 0.13 for October-December 2019 as against Tk. 0.22 for October-December 2018; EPS was Tk. 0.25 for July-December 2019 as against Tk. 0.41 for July-December 2018. NOCFPS was Tk. 0.74 for July-December 2019 as against Tk. 0.09 for July-December 2018. NAV per share was Tk. 14.75 as on December 31, 2019 and Tk. 14.50 as on June 30, 2019.

AIL

(Q2 Un-audited): EPS was Tk. 0.60 for October-December 2019 as against Tk. 1.05 for October-December 2018; EPS was Tk. 1.06 for July-December 2019 as against Tk. 1.73 for July-December 2018. NOCFPS was Tk. 0.52 for July-December 2019 as against Tk. 0.16 for July-December 2018. NAV per share was Tk. 21.80 as on December 31, 2019 and Tk. 20.83 as on June 30, 2019.

MLDYEING

The Company has informed that they have signed an agreement on February 17, 2020 with AMJ Narrow Fabrics Pvt. Ltd. of 5, Dr. Rajendra Prasad Sarani (Clive Row), Sarvamangala Building, Kolkata - 700 001, India for sales / export of 50,00,000.00 Pound Dyed Yarns.

RELIANCINS

The Board of Directors has recommended 25% cash dividend for the year ended on December 31, 2019. Date of AGM: 31.03.2020, Time: 11:00 AM, Venue: La - Vita Hall, Lake Shore Hotel, House No. # 46, Road No. # 41, Gulshan - 2, Dhaka - 1212. Record date: 11.03.2020. The Company has also reported EPS of Tk. 5.57, NAV per share of Tk. 52.60 and NOCFPS of Tk. 4.66 for the year ended on December 31, 2019 as against Tk. 4.74 (Restated), Tk. 55.29 (Restated) and Tk. 3.20 (Restated) respectively for the same period of the previous year.