

Daily Market Update

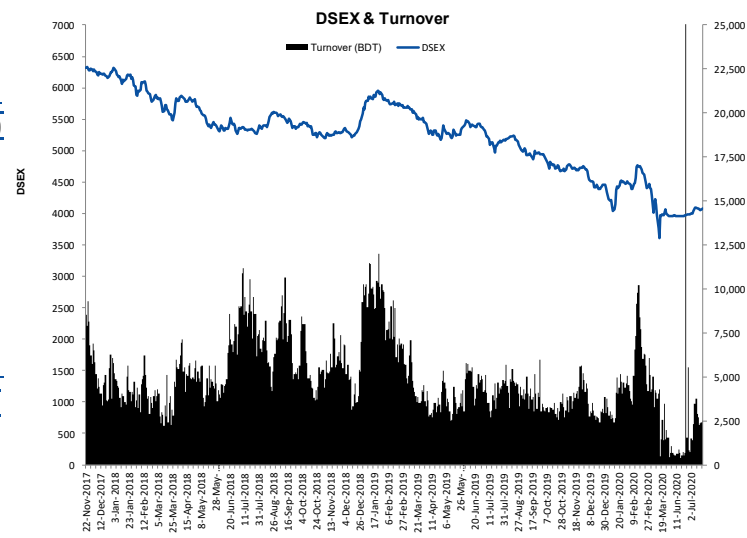
The market closed in green today. The benchmark index DSEX (+0.38%) gained 15.64 points and closed at 4,085.80. The blue-chip index DS30 (+0.54%), the Shariah-based index DSES (+0.45%), and the large cap index CDSET (+0.28%) closed at 1,372.09, 948.32, and 808.63 points respectively. All the large cap sectors posted positive performance today. NBFi booked the highest gain of 1.17% followed by Pharmaceutical (+0.40%), Fuel & Power (+0.39%), Food & Allied (+0.38%), Telecommunication (+0.28%), Engineering (+0.13%) and Bank (+0.05%). Block trade contributed 12.7% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+1.5%) was the most traded share with a turnover of BDT 116 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap (mn BDT)	% of Total Mcap	Sectoral Turnover (mn BDT)	% of Total Turnover
Banks	1,144.75	1,144.22	0.53	0.05%	30	466,602.3	17.83%	82.1	3.72%
NBFIs	1,387.05	1,371.07	15.98	1.17%	23	128,232.3	4.90%	62.2	2.82%
Mutual Funds	576.56	568.93	7.62	1.34%	37	29,962.8	1.14%	110.7	5.02%
General Insurance	1,840.07	1,826.40	13.67	0.75%	35	49,715.5	1.90%	430.5	19.51%
Life Insurance	1,909.29	1,883.76	25.53	1.36%	12	53,233.7	2.03%	81.3	3.69%
Telecommunication	3,463.80	3,454.26	9.54	0.28%	2	348,135.7	13.30%	122.2	5.54%
Pharmaceuticals	2,507.19	2,497.19	10.00	0.40%	32	472,606.6	18.06%	495.9	22.48%
Fuel & Power	1,445.28	1,439.63	5.65	0.39%	19	358,283.4	13.69%	116.3	5.27%
Cement	1,182.07	1,182.07	0.00	0.00%	7	71,888.0	2.75%	1.9	0.09%
Services & Real Estate	952.12	950.70	1.41	0.15%	8	38,013.3	1.45%	14.9	0.67%
Engineering	2,035.73	2,033.07	2.66	0.13%	39	132,096.3	5.05%	157.4	7.13%
Food & Allied	11,355.15	11,311.89	43.26	0.38%	17	209,691.2	8.01%	112.5	5.10%
IT	1,814.69	1,800.51	14.18	0.79%	9	20,063.6	0.77%	80.6	3.65%
Textiles	955.28	951.27	4.02	0.42%	56	96,419.1	3.68%	103.9	4.71%
Paper & Printing	5,082.35	5,044.59	37.76	0.75%	3	9,717.0	0.37%	23.4	1.06%
Tannery	1,667.26	1,667.26	0.00	0.00%	6	17,849.2	0.68%	1.2	0.05%
Jute	7,957.01	7,946.87	10.15	0.13%	3	1,758.5	0.07%	3.7	0.17%
Ceramics	390.02	389.73	0.28	0.07%	5	19,775.2	0.76%	53.2	2.41%
Miscellaneous	1,683.81	1,671.96	11.85	0.71%	13	93,429.5	3.57%	152.8	6.93%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Dhaka Insurance Limited	34.20	10.0%	31.4
Fine Foods Ltd	58.00	9.8%	28.1
Northern Islami Insurance Limited	21.10	-1.4%	17.5
Bangladesh Shipping Corporation	42.20	9.0%	60.7
United Insurance	42.60	8.7%	23.2
Prime Finance First MF	13.90	8.6%	22.9
Continental Ins Ltd.	19.80	7.7%	11.7
Dacca Dyeing	4.20	7.7%	.1
CAPM IBBL Islamic Mutual Fund	7.50	7.1%	1.7
Shaympur Sugar	33.50	7.0%	.9

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Prime Insurance	17.00	-5.6%	.1
Jamuna Bank	16.00	-4.8%	2.4
Pragati Life Insurance	92.20	-4.0%	10.8
Reliance Insurance	38.60	-3.0%	4.9
Progressive Life Ins	107.80	-2.8%	26.4
Islami Insurance	22.90	-2.6%	14.0
Global Insurance Ltd.	19.20	-2.5%	10.1
Glaxo Smithkline	2,137.90	-2.2%	22.8
Paramount Insurance	70.70	-2.1%	18.1
Nahee Aluminium Composite Panel Ltd.	52.90	-2.0%	40.3

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Beximco Pharmaceuticals	75.50	1.5%	116.0
Square Pharmaceuticals	175.30	0.0%	112.3
Grameenphone Ltd.	246.50	0.2%	62.9
Pioneer Insurance	37.20	3.9%	62.7
Bangladesh Shipping Corporation	42.20	9.0%	60.7
Bangladesh Submarine Cable Company Limited	92.70	1.0%	59.3
Golden Harvest Agro Industries Ltd.	17.90	4.7%	54.0
Monno Ceramic	127.20	0.3%	52.9
Beacon Pharmaceuticals Limited	72.10	6.2%	50.2
Indo-Bangla Pharmaceuticals Limited	21.40	0.5%	47.5



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,085.80	4,070.15	15.64	0.38%	-8.24%
DS30	1,372.09	1,364.68	7.40	0.54%	-9.33%
DSES	948.32	944.03	4.28	0.45%	-5.15%
CDSET	808.63	806.39	2.24	0.28%	-10.13%

	Advanced	Declined	Unchanged	Total
All Category	131	37	179	347
A Category (Equity)	101	29	121	251
B Category (Equity)	15	5	27	47
N Category (Equity)	1	0	0	1
Z Category (Equity)	14	3	31	48
Mutual Funds	20	0	15	35
Corporate Bonds	0	1	0	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,171,665.6	3,162,534.5	
	Mn USD	37,331.3	37,223.8	0.3%
Turnover	Mn BDT	2,528.9	2,404.8	5.2%
	Mn USD	29.8	28.3	
Volume	Mn Shares	79.7	84.2	-5.4%
Trade		68,991	54,466	26.7%

Top Ten Market Cap	Mcap (bn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	332.8	12.7%	62.92	9.6x	7.9x
British American Tobacco Bangladesh Company Limited	163.4	6.2%	4.46	19.0x	6.7x
Square Pharmaceuticals	148.0	5.7%	112.28	11.2x	2.3x
United Power Generation & Distribution Company Ltd	116.0	4.4%	.29	14.3x	7.9x
Renata Ltd.	91.7	3.5%	6.99	22.7x	5.0x
Berger Paints	60.7	2.3%	1.77	24.9x	9.1x
Investment Corporation of Bangladesh	53.2	2.0%	4.33	NM	2.6x
Marico Bangladesh Limited	49.2	1.9%	.24	18.9x	33.4x
BRAC Bank	42.3	1.6%	.26	8.6x	0.9x
LafargeHolcim Bangladesh Limited	41.7	1.6%	1.08	23.9x	2.7x

Top Ten Free Float Mcap	Free Float Mcap (bn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	96.8	9.1%	112.28	11.2x	2.3x
Renata Ltd.	44.8	4.2%	6.99	22.7x	5.0x
British American Tobacco Bangladesh Company Limited	43.2	4.1%	4.46	19.0x	6.7x
Grameenphone Ltd.	33.3	3.1%	62.92	9.6x	7.9x
Beximco Pharmaceuticals	26.6	2.5%	115.99	9.4x	1.1x
BRAC Bank	23.6	2.2%	.26	8.6x	0.9x
Olympic Industries	22.2	2.1%	5.45	15.3x	4.9x
Eastern Bank	17.4	1.6%	.17	6.4x	0.9x
Islami Bank	16.7	1.6%	.00	6.0x	0.6x
Pubali Bank	15.1	1.4%	.21	10.0x	0.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Aman Feed Limited	28.80	28.80	0.91	31,500	1
British American Tobacco Bangladesh Company Limited	860.00	850.00	48.42	56,656	25
BRAC Bank	28.80	28.80	0.50	17,500	1
Confidence Cement	87.40	87.30	6.54	74,836	3
Dragon Sweater & Spinning Ltd.	8.60	8.60	1.20	140,000	2
Gemini Sea Food	129.90	129.90	0.51	3,900	1
Grameen One Scheme Two	11.10	11.10	0.83	75,000	1
Khulna Power Company Limited	45.30	41.80	200.83	4,435,226	4
Marico Bangladesh Limited	1,505.00	1,500.00	7.51	5,000	2
Mercantile Bank	10.10	10.10	0.66	65,000	1
Monno Jute Staffers	755.00	740.00	2.48	3,300	4
Orion Infusion	72.10	72.10	0.54	7,500	1
Progressive Life Ins	112.50	112.50	12.86	114,300	1
Ring Shine Textiles Limited	6.50	6.50	2.73	420,000	1
Singer Bangladesh	147.00	132.50	1.83	13,280	3
SK Trims & Industries Limited	62.20	56.00	17.90	295,001	9
Standard Ceramic	303.00	303.00	0.59	1,950	1
United Power Generation & Distribution Company Ltd	210.00	201.10	11.02	53,730	20
VFS Thread Dyeing Limited	22.50	22.30	2.09	93,500	3
Yeakin Polymer Limited	11.10	11.10	2.23	200,451	4
Total			322.17		88

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
CENTRALINS	Central Insurance Company Ltd.		5.0%	7.0%	31-Dec-19	23-Jul-20
SIBL	Social Islami Bank Limited		5.0%	5.0%	31-Dec-19	26-Jul-20
PHOENIXFIN	Phoenix Finance and Investments Ltd.		6.0%	6.0%	31-Dec-19	26-Jul-20
EASTERNINS	Eastern Insurance Company Ltd.		0.0%	20.0%	31-Dec-19	26-Jul-20
ASIAPACINS	Asia Pacific General Insurance Co. Ltd.		0.0%	10.0%	31-Dec-19	27-Jul-20
SOUTHEASTB	Southeast Bank Ltd.		2.5%	7.5%	31-Dec-19	28-Jul-20
TAKAFULINS	Takaful Islami Insurance Limited		0.0%	10.0%	31-Dec-19	29-Jul-20
BNICL	Bangladesh National Insurance Company Limited		0.0%	12.0%	31-Dec-19	29-Jul-20
ALARABANK	Al-Arafah Islami Bank Ltd.		0.0%	13.0%	31-Dec-19	30-Jul-20

Important DSE News
PRAGATILIF

The Board of Directors has recommended 20% cash dividend for the year ended on December 31, 2019. Date of AGM: 27.09.2020, Time: 12:00 Noon, Venue: Digital Platform. Record Date: 12.08.2020.

(Q1 Un-audited): Increase in life revenue account for Jan-Mar 2020 was Tk. 42.18 million with total life insurance fund of Tk. 5,725.66 million as against increase in life revenue account of Tk. 45.50 million and Tk. 5,594.91 million respectively for the same period of the previous year.

(Q2 Un-audited): Increase in life revenue account for Apr-June 2020 was Tk. 67.21 mn. with total life insurance fund of Tk. 5,792.87 mn. as against increase in Tk. 55.85 mn. and Tk. 5,650.76 mn. respectively for the same period of the previous year. Increase in life revenue account for Jan-June 2020 was Tk. 109.39 mn. with total life insurance fund of Tk. 5,792.87 mn. as against increase in Tk. 101.35 mn. and Tk. 5,650.76 mn. respectively for the same period of the previous year.

ISLAMIINS

The Board of Directors has recommended 5% cash and 5% stock dividend for the year ended on December 31, 2019. Date of AGM: 10.10.2020, Time: 10:30 AM, Venue: To be notified later on. Record Date: 13.08.2020. The Company has also reported EPS of Tk. 1.68, NAV per share of Tk. 14.85 and NOCFPS of Tk. 2.03 for the year ended on December 31, 2019 as against Tk. 1.49, Tk. 14.17 and Tk. 2.34 respectively for the same period of the previous year.

(Q1 Un-audited): EPS was Tk. 0.45 for January-March 2020 as against Tk. 0.42 for January-March 2019. NOCFPS was Tk. 1.78 for January-March 2020 as against Tk. 0.57 for January-March 2019. NAV per share was Tk. 15.30 as on March 31, 2020 and Tk. 14.85 as on December 31, 2019.

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(Q2 Un-audited): EPS was Tk. 0.62 for April-June 2020 as against Tk. 1.38 for April-June 2019;

EPS was Tk. 1.09 for January-June 2020 as against Tk. 1.92 for January-June, 2019. NOCFPS was Tk. 0.72 for January-June 2020 as against Tk. 0.54 for January-June 2019. NAV per share was Tk. 20.71 as on June 30, 2020 and Tk. 19.93 as on June 30, 2019.

SHYAMPSUG

(Q3 Un-audited): EPS was Tk. (26.34) for January-March 2020 as against Tk. (32.84) for January-March 2019; EPS was Tk. (72.38) for July 2019-March 2020 as against Tk. (77.45) for July 2018-March 2019. NOCFPS was Tk. (1.37) for July 2019-March 2020 as against Tk. (34.94) for July 2018-March 2019. NAV per share was Tk. (940.35) as on March 31, 2020 and Tk. (867.97) as on June 30, 2019.