

Daily Market Update

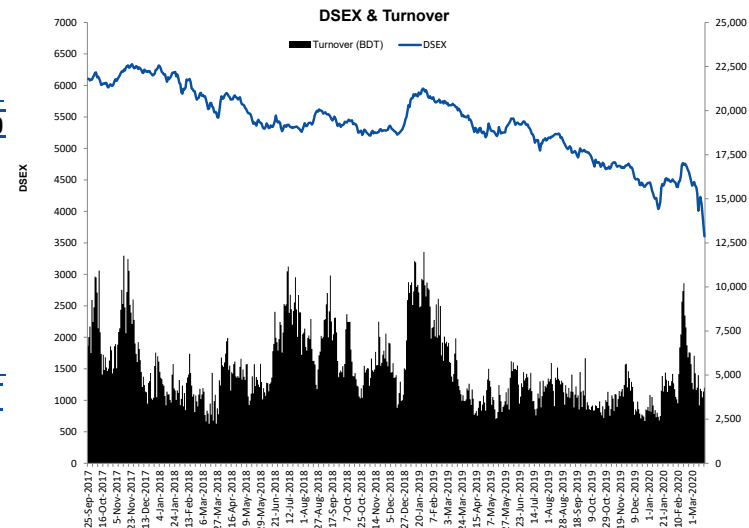
Market closed in red today. The benchmark index DSEX (-4.47%) lost 168.61 points and closed at 3,603.95 points. The blue chip index DS30 (-4.87%), the Shariah-based index DSES (-4.49%), and the large cap index CDSET (-4.26%) all closed in red. All the large cap sectors showed negative performance today. Food & Allied experienced the highest loss of 5.93% followed by Power (-5.68%), Engineering (-5.65%), NBFIs (-5.11%), Telecommunication (-4.58%), Pharmaceuticals (-3.98%) and Banks (-2.77%). Turnover stood at BDT 4.3 billion (USD 50.5 million). Square Pharmaceuticals (-2.9%) was the most traded share with a turnover of BDT 186.2 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,005.29	1,033.91	-28.63	-2.77%	30	409,755.0	17.76%	403.2	10.73%
NBFIs	1,202.74	1,267.57	-64.83	-5.11%	23	111,192.9	4.82%	128.4	3.42%
Mutual Funds	522.84	547.64	-24.80	-4.53%	37	27,171.2	1.18%	57.2	1.52%
General Insurance	1,370.61	1,447.29	-76.68	-5.30%	35	37,031.3	1.61%	116.2	3.09%
Life Insurance	1,527.70	1,639.09	-111.39	-6.80%	12	42,594.4	1.85%	50.6	1.35%
Telecommunication	3,058.40	3,205.31	-146.91	-4.58%	2	307,390.1	13.32%	209.7	5.58%
Pharmaceuticals	2,215.32	2,307.16	-91.84	-3.98%	32	417,587.7	18.10%	763.6	20.31%
Fuel & Power	1,297.34	1,375.52	-78.18	-5.68%	19	321,609.5	13.94%	274.2	7.29%
Cement	1,067.39	1,114.42	-47.03	-4.22%	7	64,914.0	2.81%	123.9	3.30%
Services & Real Estate	864.18	917.03	-52.85	-5.76%	8	34,502.4	1.50%	91.9	2.44%
Engineering	1,798.83	1,906.57	-107.74	-5.65%	39	116,723.7	5.06%	427.9	11.38%
Food & Allied	10,180.37	10,822.01	-641.64	-5.93%	17	187,997.1	8.15%	181.5	4.83%
IT	1,586.62	1,675.43	-88.81	-5.30%	9	17,542.0	0.76%	92.3	2.45%
Textiles	817.92	884.04	-66.12	-7.48%	56	82,554.9	3.58%	345.0	9.18%
Paper & Printing	4,416.71	4,636.77	-220.06	-4.75%	3	8,444.3	0.37%	44.4	1.18%
Tannery	1,510.69	1,592.32	-81.63	-5.13%	6	16,173.0	0.70%	73.5	1.96%
Jute	6,701.25	7,340.65	-639.40	-8.71%	3	1,481.0	0.06%	17.3	0.46%
Ceramics	353.73	374.78	-21.05	-5.62%	5	17,935.4	0.78%	200.4	5.33%
Miscellaneous	1,522.64	1,610.25	-87.61	-5.44%	13	84,486.4	3.66%	158.4	4.21%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
EBL First MF	3.90	5.4%	.5
Premier Leasing	4.90	4.3%	8.8
Appollo Ispat Complex Limited	2.60	4.0%	1.5
BD Thai Aluminium	9.50	3.3%	2.3
Vanguard AML Rupali Bank Balanced Fund	4.20	2.4%	.6
FAS Finance & Investments Limited	4.20	2.4%	21.8
Hwa Well Textiles (BD) Limited	30.30	2.0%	.0
Monno Ceramic	128.80	1.3%	168.8
Trust Bank	24.00	0.8%	1.0
The Ibn Sina	208.10	0.5%	2.9

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
ICB AMCL Third NRB Mutual Fund	4.50	-10.0%	4.3
Apex Spinning & Knitting Mills Limited	113.60	-10.0%	9.2
Sea Pearl Beach Resort & Spa Limited	72.30	-10.0%	51.3
Queen South Textiles Mills Limited	19.90	-10.0%	6.9
Eastern Cables	115.10	-9.9%	9.1
Progressive Life Ins	84.30	-9.9%	13.6
BRAC Bank	27.20	-9.9%	71.4
Sonar Bangla Ins	25.40	-9.9%	11.2
Sonargaon Textiles	20.00	-9.9%	14.9
Samorita Hospital	52.80	-9.9%	3.1

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Square Pharmaceuticals	159.50	-2.9%	186.2
Grameenphone Ltd.	219.50	-4.5%	185.7
Monno Ceramic	128.80	1.3%	168.8
LafargeHolcim Bangladesh Limited	32.70	-3.5%	88.8
Orion Pharma Ltd.	38.70	-5.6%	81.8
BRAC Bank	27.20	-9.9%	71.4
British American Tobacco Bangladesh Company Limited	828.70	-5.2%	67.8
Khulna Power Company Limited	41.30	-4.0%	58.4
Beximco Limited	11.60	-4.9%	54.8
Sea Pearl Beach Resort & Spa Limited	72.30	-10.0%	51.3



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	3,603.95	3,772.56	-168.61	-4.47%	-19.07%
DS30	1,203.43	1,265.07	-61.64	-4.87%	-20.48%
DSES	834.78	874.06	-39.28	-4.49%	-16.51%
CDSET	719.65	751.67	-32.02	-4.26%	-20.02%

	Advanced	Declined	Unchanged	Total
All Category	13	333	10	356
A Category (Equity)	9	243	7	259
B Category (Equity)	2	45	1	48
N Category (Equity)	0	1	0	1
Z Category (Equity)	2	44	2	48
Mutual Funds	2	35	0	37
Corporate Bonds	0	0	1	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	2,873,825.8	2,988,931.1	
	Mn USD	33,825.6	35,180.5	-3.9%
Turnover	Mn BDT	4,290.3	4,066.4	5.5%
	Mn USD	50.5	47.9	
Volume	Mn Shares	178.5	186.8	-4.5%
Trade		147,028	147,028	0.0%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	296.4	12.9%	185.67	8.6x	7.0x
British American Tobacco Bangladesh Company Limited	149.2	6.5%	67.80	17.3x	6.1x
Square Pharmaceuticals	134.7	5.8%	186.19	10.2x	2.0x
United Power Generation & Distribution Company Ltd	102.8	4.5%	37.06	12.7x	7.0x
Renata Ltd.	87.1	3.8%	26.21	21.5x	4.8x
Berger Paints	56.9	2.5%	11.12	23.4x	8.5x
Investment Corporation of Bangladesh	47.0	2.0%	8.36	NM	2.3x
Marico Bangladesh Limited	45.7	2.0%	31.69	17.5x	31.0x
LafargeHolcim Bangladesh Limited	38.0	1.6%	88.79	21.1x	2.5x
Summit Power	34.9	1.5%	29.53	6.4x	1.3x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	88.3	9.5%	186.19	10.2x	2.0x
Renata Ltd.	42.5	4.6%	26.21	21.5x	4.8x
British American Tobacco Bangladesh Company Limited	39.5	4.2%	67.80	17.3x	6.1x
Grameenphone Ltd.	29.6	3.2%	185.67	8.6x	7.0x
BRAC Bank	18.7	2.0%	71.38	6.5x	0.9x
Beximco Pharmaceuticals	18.7	2.0%	15.94	6.6x	0.8x
Olympic Industries	18.6	2.0%	17.99	12.8x	4.1x
Eastern Bank	15.8	1.7%	2.96	7.1x	1.0x
Pubali Bank	14.0	1.5%	3.16	5.4x	0.7x
LafargeHolcim Bangladesh Limited	13.4	1.4%	88.79	21.1x	2.5x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Beacon Pharmaceuticals Limited	63.40	52.00	311.66	5,555,000	4
Delta Brac Housing	80.30	80.20	5.49	68,423	2
Grameenphone Ltd.	220.00	220.00	1.32	6,000	2
Orion Pharma Ltd.	43.40	43.40	1.52	35,000	1
Paramount Textile Limited	45.00	45.00	1.35	30,000	1
Renata Ltd.	1,012.00	1,012.00	202.40	200,000	1
Standard Insurance	40.00	40.00	6.80	170,000	1