

Daily Market Update

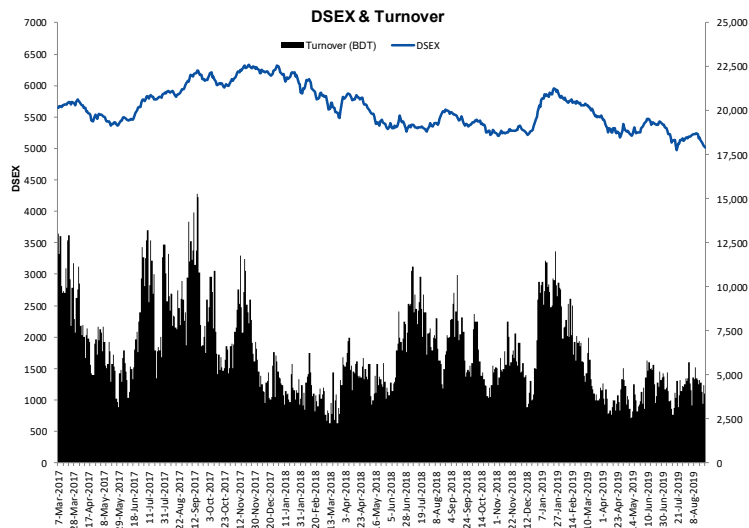
Market closed in red today. The benchmark index DSEX (-0.53%) lost 26.48 points and closed at 5,007.06 points today. The blue chip index DS30 (-0.90%) and the shariah based index DSES (-0.45%) both closed in red. The large cap sectors showed negative performance today except Pharmaceuticals (+0.25%). Telecommunication experienced the highest loss of 2.98% followed by Power (-1.03%), Food & Allied (-0.97%), Food & Allied (-0.82%), Banks (-0.68%) and NBFIs (-0.27%). Turnover stood at BDT 3.9 billion (USD 47.5 million). Monno Ceramic (-3.4%) was the most traded share with a turnover of BDT 278.7 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,348.52	1,357.81	-9.29	-0.68%	30	550,406.8	17.29%	229.3	6.11%
NBFIs	1,703.11	1,707.78	-4.68	-0.27%	23	157,449.6	4.95%	55.8	1.49%
Mutual Funds	620.79	622.28	-1.49	-0.24%	37	32,260.9	1.01%	60.6	1.61%
General Insurance	1,777.85	1,783.52	-5.67	-0.32%	35	48,156.8	1.51%	119.6	3.19%
Life Insurance	2,121.32	2,130.67	-9.35	-0.44%	12	59,145.4	1.86%	66.4	1.77%
Telecommunication	4,144.34	4,271.45	-127.11	-2.98%	2	416,534.8	13.09%	111.5	2.97%
Pharmaceuticals	2,829.65	2,822.68	6.97	0.25%	32	533,683.7	16.77%	696.7	18.56%
Fuel & Power	1,913.58	1,933.55	-19.97	-1.03%	20	474,374.6	14.90%	255.2	6.80%
Cement	1,362.16	1,368.27	-6.11	-0.45%	7	82,838.9	2.60%	15.6	0.42%
Services & Real Estate	970.91	984.77	-13.86	-1.41%	8	38,040.8	1.20%	52.6	1.40%
Engineering	2,922.16	2,922.53	-0.37	-0.01%	39	190,316.4	5.98%	660.7	17.61%
Food & Allied	14,935.71	15,081.91	-146.19	-0.97%	17	274,873.7	8.64%	129.8	3.46%
IT	1,893.62	1,909.19	-15.57	-0.82%	9	20,936.2	0.66%	133.3	3.55%
Textiles	1,246.14	1,244.09	2.05	0.17%	55	120,853.9	3.80%	397.8	10.60%
Paper & Printing	6,715.75	6,752.04	-36.30	-0.54%	3	12,839.9	0.40%	14.1	0.38%
Tannery	2,351.07	2,364.91	-13.84	-0.59%	6	25,317.1	0.80%	166.6	4.44%
Jute	18,440.86	17,940.49	500.37	2.79%	3	4,075.5	0.13%	49.3	1.31%
Ceramics	529.76	537.11	-7.35	-1.37%	5	25,587.1	0.80%	322.3	8.59%
Miscellaneous	2,073.02	2,074.82	-1.80	-0.09%	13	115,025.3	3.61%	215.8	5.75%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Meghna Condensed Milk	16.10	9.5%	.2
Desh Garments	199.30	9.1%	8.9
Zeal Bangla Sugar Mills	32.80	9.0%	.1
Gemini Sea Food	273.20	8.7%	26.9
Stylecraft Limited	867.80	7.5%	145.2
S. S. Steel Limited	32.40	7.3%	45.5
Miracle Ind.	23.20	6.9%	7.0
Sonali Aansh	536.40	5.4%	45.6
Bangladesh Shipping Corporation	52.80	4.8%	89.0
Legacy Footwear	129.80	4.6%	92.9

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Imam Button	20.10	-9.5%	1.7
C & A Textiles Limited	2.60	-7.1%	.4
United Airways (BD) Ltd.	1.90	-5.0%	2.3
Sinobangla Industries	71.80	-5.0%	31.1
Dulamia Cotton	47.30	-5.0%	.3
Dacca Dyeing	3.80	-5.0%	.2
Tallu Spinning	4.10	-4.7%	.1
NLI First Mutual Fund	11.00	-4.3%	6.6
Shurwid Industries Limited	24.60	-4.3%	27.7
EBL NRB Mutual Fund	4.50	-4.3%	.0

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Monno Ceramic	229.50	-3.4%	278.7
Monno Jute Staffers	1,719.00	0.7%	184.7
Stylecraft Limited	867.80	7.5%	145.2
United Power Generation & Distribution Company Ltd	386.30	-2.1%	94.4
Grameenphone Ltd.	294.70	-3.1%	93.1
Legacy Footwear	129.80	4.6%	92.9
Silco Pharmaceuticals Limited	35.30	4.1%	91.5
Bangladesh Shipping Corporation	52.80	4.8%	89.0
Beacon Pharmaceuticals Limited	25.60	0.0%	76.5
JMI Syringes & Medical Devices Ltd	491.90	-0.6%	72.8



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	5,007.06	5,033.54	-26.48	-0.53%	-7.03%
DS30	1,759.12	1,775.01	-15.89	-0.90%	-6.47%
DSES	1,167.14	1,172.40	-5.26	-0.45%	-5.33%

	Advanced	Declined	Unchanged	Total
All Category	109	169	61	339
A Category (Equity)	79	131	41	251
B Category (Equity)	11	18	10	39
N Category (Equity)	8	1	0	9
Z Category (Equity)	11	19	10	40
Mutual Funds	4	6	14	24
Corporate Bonds	1	0	0	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,743,111.3	3,768,385.3	-0.7%
	Mn USD	45,027.2	45,331.2	
Turnover	Mn BDT	3,948.3	4,429.0	-10.9%
	Mn USD	47.5	53.3	
Volume	Mn Shares	90.8	106.5	-14.7%
Trade		124,021	134,712	-7.9%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	397.9	12.5%	93.09	10.6x	9.4x
British American Tobacco Bangladesh Company Limited	214.5	6.7%	40.65	23.0x	8.8x
Square Pharmaceuticals	197.3	6.2%	44.74	16.2x	3.2x
United Power Generation & Distribution Company Ltd	185.1	5.8%	94.38	25.0x	13.0x
Renata Ltd.	96.5	3.0%	26.42	28.0x	5.8x
Berger Paints	73.2	2.3%	15.30	38.5x	10.9x
Investment Corporation of Bangladesh	70.5	2.2%	.88	30.0x	2.7x
BRAC Bank	69.2	2.2%	48.23	12.4x	1.6x
Marico Bangladesh Limited	55.7	1.7%	13.01	29.4x	37.8x
LafargeHolcim Bangladesh Limited	43.8	1.4%	6.04	35.2x	2.9x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	129.4	10.0%	44.74	16.2x	3.2x
British American Tobacco Bangladesh Company Limited	56.7	4.4%	40.65	23.0x	8.8x
Renata Ltd.	47.1	3.6%	26.42	28.0x	5.8x
Grameenphone Ltd.	39.8	3.1%	93.09	10.6x	9.4x
BRAC Bank	38.5	3.0%	48.23	12.4x	1.6x
Olympic Industries	29.8	2.3%	9.97	22.4x	6.5x
Beximco Pharmaceuticals	29.1	2.2%	8.10	11.7x	1.2x
Eastern Bank	26.5	2.0%	1.22	7.8x	1.0x
Islami Bank	19.0	1.5%	1.73	5.7x	0.6x
United Power Generation & Distribution Company Ltd	18.5	1.4%	94.38	25.0x	13.0x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Beacon Pharmaceuticals Limited	26.00	25.60	85.31	3,301,000	11
BRAC Bank	56.70	56.40	61.89	1,093,000	7
Meghna Life Insurance	59.10	59.10	4.43	74,910	2
Pragati Life Insurance	155.00	155.00	5.27	34,000	1
Saiham Cotton Mills Limited	24.10	24.10	0.96	40,000	1
Shurwid Industries Limited	25.00	25.00	6.25	250,000	1
Singer Bangladesh	205.50	205.50	10.89	53,000	2
Square Pharmaceuticals	250.00	250.00	12.50	50,000	1
S. S. Steel Limited	32.00	32.00	7.75	242,087	2

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
UPGDCL	United Power Generation & Distribution Company Ltd.		10.0%	130.0%	31-Dec-2018	8-Sep-2019

Important DSE News

PRIMEBANK

Mr. Khandker Mohammad Khaled, one of the Sponsors of the Company, has expressed his intention to sell 10,60,000 shares out of his total holding of 1,05,85,865 shares of the Company at prevailing market price (in the Block Market) through Stock Exchange (DSE) within next 30 working days.

DOREENPWR

With reference to their earlier news disseminated by DSE on 01.09.2019, the Company has further

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informed that reasons for declaration of stock dividend: a) Bonus shares are issued to retain profit for further investment and retained profit will be used as equity investment in Chandpur Power Generations Limited which is 99.90% owned subsidiary of the company. b) Bonus shares is declared out of accumulated profit and c) Bonus shares is not declared from capital reserve or re-valuation reserve or any unrealized gain or out of profit earned prior to incorporation of the Company or through reducing paid up capital or through doing anything so that the post dividend retained earnings become negative or a debit balance.

FIRSTSBANK

Mr. Abu Hena Mostafa Kamal, one of the Sponsors of the Company, has expressed his intention to sell 6,58,100 shares out of his total holding of 31,58,100 shares of the Company at prevailing market price (in the Block Market) through Stock Exchange (CSE) within next 30 working days.

GENEXIL

The Company has informed that the Board of Directors has approved an agreement of 5 years duration, with Robi Axiata Limited, Dhaka, Bangladesh for contact of offer and sell Multi-Play Service to Robi customers via the Company 's ISP license which will increase the total revenue of the company.

CONFIDCEM

The Company has informed that the Board of Directors has approved the purchase of 51,00,000 ordinary shares of Tk.10.00 each of Zodiac Power Chittagong Limited with effect from August 06, 2019 which is 51% stake in the equity of the Zodiac Power Chittagong Limited and made it a subsidiary of the company. Zodiac Power Chittagong Limited is an Independent Power Producer company having 54.363 MW HPO based Power Plant located at Kolagao, Patiya, Chattogram. The Company also informed that upon successful testing and commissioning the Zodiac Power Chittagong Limited, a 51% subsidiary of the Confidence Cement Limited, has started commercial operation of its HFO based, Net 54.363 MW Power Plant consisting of the Unit of MAN Engines supplied along with related auxiliaries by Germany with effect from August 30, 2019 to sell the whole production of electricity to the Bangladesh Power Development Board (BPDB).