

## Daily Market Update

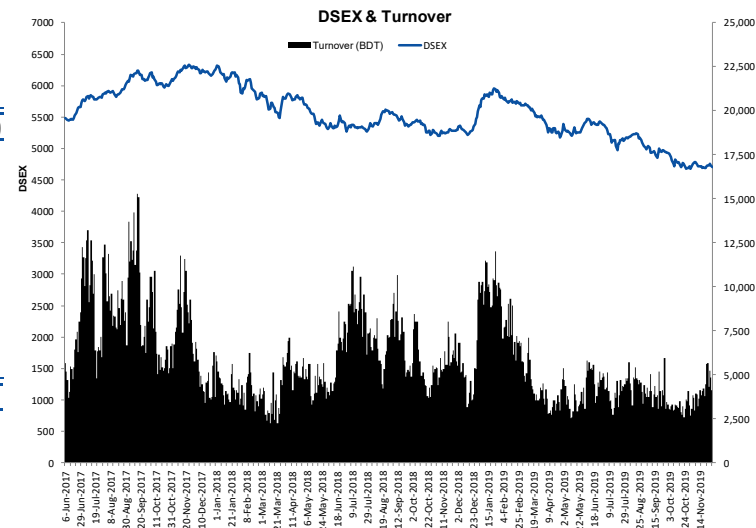
Market closed in red today. The benchmark index DSEX (-0.79%) lost 37.24 points and closed at 4,697.35 points. Both the blue chip index DS30 (-0.72%) and the Shariah-based index DSES (-0.66%) closed in red. All the large cap sectors showed negative performance today. Banks experienced the highest loss of 1.47% followed by Telecommunication (-1.18%), Engineering (-1.12%), Pharmaceuticals (-0.85%), Food & Allied (-0.85%), NBFIs (-0.19%), and Power (-0.14%). Turnover stood at BDT 4.1 billion (USD 49.6 million). LafargeHolcim Bangladesh Limited (+6.0%) was the most traded share with a turnover of BDT 161.9 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,376.15	1,396.70	-20.55	-1.47%	30	561,685.5	18.87%	514.0	12.64%
NBFIs	1,686.40	1,689.67	-3.26	-0.19%	23	155,905.8	5.24%	320.6	7.88%
Mutual Funds	601.34	607.70	-6.37	-1.05%	37	31,250.0	1.05%	87.4	2.15%
General Insurance	1,990.12	1,975.23	14.89	0.75%	35	53,906.8	1.81%	775.8	19.07%
Life Insurance	2,070.52	2,079.94	-9.42	-0.45%	12	57,729.1	1.94%	54.1	1.33%
Telecommunication	4,295.90	4,347.31	-51.41	-1.18%	2	431,767.6	14.50%	88.0	2.16%
Pharmaceuticals	2,617.53	2,640.08	-22.55	-0.85%	32	493,676.7	16.58%	321.6	7.91%
Fuel & Power	1,608.07	1,610.31	-2.23	-0.14%	20	398,638.8	13.39%	166.9	4.10%
Cement	1,252.76	1,215.02	37.74	3.11%	7	76,187.4	2.56%	169.6	4.17%
Services & Real Estate	935.87	935.08	0.79	0.08%	8	36,668.7	1.23%	54.8	1.35%
Engineering	2,384.15	2,411.18	-27.02	-1.12%	39	154,717.6	5.20%	312.7	7.69%
Food & Allied	13,248.34	13,362.55	-114.21	-0.85%	17	244,689.4	8.22%	85.0	2.09%
IT	1,735.42	1,719.99	15.43	0.90%	9	19,187.2	0.64%	136.5	3.35%
Textiles	1,093.81	1,094.78	-0.97	-0.09%	55	104,653.5	3.52%	486.8	11.97%
Paper & Printing	5,134.36	5,297.37	-163.01	-3.08%	3	9,816.4	0.33%	15.6	0.38%
Tannery	1,809.30	1,795.88	13.42	0.75%	6	19,483.1	0.65%	117.3	2.88%
Jute	12,744.36	12,411.09	333.28	2.69%	3	2,816.6	0.09%	29.9	0.73%
Ceramics	472.46	470.35	2.11	0.45%	5	22,819.5	0.77%	34.6	0.85%
Miscellaneous	1,827.92	1,823.70	4.22	0.23%	13	101,425.2	3.41%	296.4	7.29%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Zaheen Spinning Limited	10.10	9.8%	23.5
Miracle Ind.	20.60	9.6%	37.8
Matin Spinning Mills Ltd.	32.90	9.3%	.0
Imam Button	20.50	8.5%	.4
Paramount Insurance	34.30	8.2%	87.8
Sinobangla Industries	76.30	7.5%	114.1
Metro Spinning	7.20	7.5%	11.5
Meghna Pet Industries	8.80	7.3%	.0
Sonar Bangla Ins	49.30	7.2%	152.3
Fareast Finance & Investment Limited	3.00	7.1%	1.3

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Progressive Life Ins	78.40	-7.5%	3.9
Familytex (BD) Limited	2.70	-6.9%	6.2
Premier Cement Mills Limited	46.50	-6.3%	.0
Zahintex Industries Ltd	4.50	-6.3%	.3
Jute Spinners	76.10	-5.9%	.0
Golden Son Ltd.	6.90	-5.5%	.5
ATBL 1st Islamic Mututal Fund	7.00	-5.4%	.9
C & A Textiles Limited	2.00	-4.8%	.2
R.N. Spinning Mills Limited	4.10	-4.7%	1.2
BD Welding	15.20	-4.4%	.3

Most Traded Share	Close	Δ%	Turnover (mn BDT)
LafargeHolcim Bangladesh Limited	38.70	6.0%	161.9
Sonar Bangla Ins	49.30	7.2%	152.3
Stylecraft Limited	326.80	-3.3%	130.4
Dutch-Bangla Bank	72.40	-1.1%	126.2
Sinobangla Industries	76.30	7.5%	114.1
United Finance Limited	19.30	3.8%	94.6
Fortune Shoes Limited	25.30	0.8%	88.2
Paramount Insurance	34.30	8.2%	87.8
Purabi Gen. Insurance Company Ltd.	19.50	3.2%	85.9
SK Trims & Industries Limited	48.80	4.1%	84.9



Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,697.35	4,734.59	-37.24	-0.79%	-12.78%
DS30	1,617.25	1,629.05	-11.80	-0.72%	-14.01%
DSES	1,060.71	1,067.75	-7.05	-0.66%	-13.96%

	Advanced	Declined	Unchanged	Total
All Category	118	199	32	349
A Category (Equity)	79	157	21	257
B Category (Equity)	20	10	4	34
N Category (Equity)	4	5	0	9
Z Category (Equity)	15	27	7	49
Mutual Funds	4	21	12	37
Corporate Bonds	0	0	1	1

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,537,978.1	3,558,146.4	-0.6%
	Mn USD	42,559.6	42,802.2	
Turnover	Mn BDT	4,123.8	4,824.8	-14.5%
	Mn USD	49.6	58.0	
Volume	Mn Shares	160.8	228.6	-29.6%
Trade		125,338	137,833	-9.1%

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

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

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	414.9	13.9%	61.34	11.9x	9.8x
British American Tobacco Bangladesh Company Limited	194.2	6.5%	21.36	22.6x	8.0x
Square Pharmaceuticals	169.2	5.7%	79.00	13.2x	2.6x
United Power Generation & Distribution Company Ltd	134.9	4.5%	21.23	15.9x	9.2x
Renata Ltd.	102.3	3.4%	8.10	25.9x	5.6x
BRAC Bank	71.7	2.4%	34.88	14.0x	1.9x
Berger Paints	66.3	2.2%	1.25	28.6x	9.9x
Investment Corporation of Bangladesh	64.2	2.2%	1.78	NM	2.2x
Marico Bangladesh Limited	54.1	1.8%	1.20	21.6x	36.7x
LafargeHolcim Bangladesh Limited	44.9	1.5%	161.93	25.0x	2.9x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	110.9	9.2%	79.00	13.2x	2.6x
British American Tobacco Bangladesh Company Limited	51.4	4.3%	21.36	22.6x	8.0x
Renata Ltd.	50.0	4.2%	8.10	25.9x	5.6x
Grameenphone Ltd.	41.5	3.5%	61.34	11.9x	9.8x
BRAC Bank	39.9	3.3%	34.88	14.0x	1.9x
Beximco Pharmaceuticals	28.1	2.3%	21.34	10.3x	1.2x
Olympic Industries	24.1	2.0%	9.93	17.1x	5.3x
Eastern Bank	19.2	1.6%	3.22	8.5x	1.2x
Pubali Bank	18.3	1.5%	1.43	7.0x	0.9x
National Bank	16.7	1.4%	8.87	7.2x	0.5x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Alif Manufacturing Company Ltd.	8.20	8.20	0.82	100,000	1
Daffodil Computers Ltd.	54.20	54.00	13.78	255,000	6
Khulna Power Company Limited	44.30	44.30	35.44	800,000	1
Miracle Ind.	17.50	17.50	0.53	30,000	1
National Feed Mill Limited	11.00	11.00	1.21	110,000	2
Sinobangla Industries	73.00	73.00	0.73	10,000	1
SK Trims & Industries Limited	46.90	46.90	0.75	16,000	1
Square Pharmaceuticals	204.00	204.00	3.06	15,000	1

### Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
LEGACYFOOT	Legacy Footwear Ltd.		0.0%	5.0%	30-Jun-2019	4-Dec-2019
SONALIANS	Sonali Aansh Industries Limited		0.0%	10.0%	30-Jun-2019	5-Dec-2019
RSRMSTEEL	Ratanpur Steel Re-Rolling Mills Ltd.		0.0%	12.0%	30-Jun-2019	5-Dec-2019
REGENTTEX	Regent Textile Mills Limited		5.0%	0.0%	30-Jun-2019	5-Dec-2019
ANWARGALV	Anwar Galvanizing Limited		0.0%	10.0%	30-Jun-2019	5-Dec-2019
ESQUIRENIT	Esquire Knit Composite Limited		0.0%	15.0%	30-Jun-2019	5-Dec-2019
MAKSONSPIN	Maksons Spinning Mills Ltd.		0.0%	2.0%	30-Jun-2019	5-Dec-2019

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### Important DSE News

#### PROGRESLIF

The Board of Directors has recommended No dividend for the year ended on December 31, 2016 and December 31, 2017. The Board of Directors has also recommended 12% stock dividend for the year ended on December 31, 2018. Date of AGM: 02.02.2020, Time: 11:00 AM for the year of 2016, 2017 and 2018. Venue: Dhaka Ladies Club, 36, Eskaton Garden Road, Ramna, Dhaka - 1000. Record Date: 08.01.2020 for the year of 2016, 2017 and 2018.

Dividend Declaration (Additional Information): The Company has further informed that a) Reason for declaration of Bonus share to comply Insurance Act- 2010 and repeatedly direction by the IDRA to raise paid up capital upto 30.00 crore immediately according to schedule-1, bonus share declared according to Actuary Valuation and Surplus. b) Bonus share were declared considering only Actuarial surplus and c) Bonus shares were not declared out of from Capital Reserve on Revaluation Reserve 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.

Dividend Declaration (Additional Information): The Company has further informed that EPS of Tk. 1.72, NAV per share of Tk. 56.40 and NOCFPS of Tk. (15.16) for the year ended on December 31, 2018.

#### MIRACLEIND

(Q1 Un-audited): EPS was Tk. (1.25) for July-September 2019 as against Tk. 0.28 for July-September 2018; NOCFPS was Tk. 1.49 for July-September 2019 as against Tk. 1.72 for July-September 2018. NAV per share was Tk. 37.61 as on September 30, 2019 and Tk. 38.85 as on June 30, 2019. The Company has also informed that the factory of the Company is closed from the month of October, 2019 due to shortage of working capital and the Board of Directors are trying best to resolve the present situation and very much hopeful to restart operation from the month of January, 2020.

#### NCCBANK

The Company has informed that the Board of Directors has decided, in principle for issuing of 'NCC BANK Perpetual Bond' for Tk. 500.00 crore only to have capital support under Additional Tier 1 Capital of BASEL III, subject to approval of Bangladesh Bank and Bangladesh Securities and Exchange Commission (BSEC).

#### SEMLFBSLGF

FBL Securities Ltd., one of the Corporate Sponsors of the Fund, has expressed its intention to sell 5,00,000 units out of its total holding of 2,70,00,000 units of the Fund at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

#### AIL

Mr. Md. Azimul Islam, one of the Directors of the Company, has expressed his intention to sell 8,41,700 shares out of his total holding of 1,16,24,734 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.