

Daily Market Update

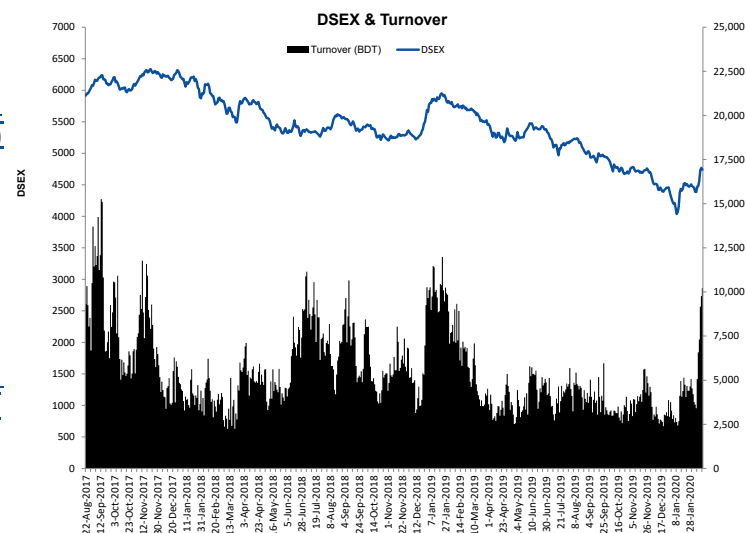
Market closed in red today. The benchmark index DSEX (-0.58%) lost 27.74 points and closed at 4,740.40 points. The blue chip index DS30 (-0.51%), the large cap index CDSET (-0.53%) and the Shariah-based index DSES (-0.22%) all closed in red. All the large cap sectors showed negative performance today except Telecommunication (+0.81%) and Pharmaceuticals (+0.04%). Banks experienced the highest loss of 1.31% followed by NBFIs (-1.24%), Food & Allied (-0.16%), Fuel & Power (-0.07%) and Engineering (-0.06%). Turnover stood at BDT 10.2 billion (USD 122.9 million). Summit Power (+3.8%) was the most traded share with a turnover of BDT 422.3 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,318.17	1,335.70	-17.53	-1.31%	30	537,287.0	17.97%	682.8	6.87%
NBFIs	1,669.29	1,690.19	-20.90	-1.24%	23	154,325.1	5.16%	227.0	2.29%
Mutual Funds	667.89	653.93	13.96	2.13%	37	34,709.1	1.16%	287.8	2.90%
General Insurance	1,978.99	2,010.52	-31.53	-1.57%	35	53,468.8	1.79%	589.7	5.93%
Life Insurance	2,175.57	2,225.14	-49.57	-2.23%	12	60,658.1	2.03%	308.4	3.10%
Telecommunication	3,725.15	3,695.17	29.98	0.81%	2	374,403.5	12.52%	267.5	2.69%
Pharmaceuticals	2,688.01	2,687.02	0.99	0.04%	32	506,970.8	16.96%	1,283.7	12.92%
Fuel & Power	1,678.38	1,679.59	-1.21	-0.07%	19	416,068.5	13.92%	1,107.6	11.15%
Cement	1,503.53	1,517.17	-13.65	-0.90%	7	91,437.9	3.06%	321.8	3.24%
Services & Real Estate	1,044.13	1,059.80	-15.67	-1.48%	8	41,686.7	1.39%	189.3	1.90%
Engineering	2,417.12	2,418.68	-1.56	-0.06%	39	157,445.5	5.27%	1,375.9	13.85%
Food & Allied	13,873.75	13,896.17	-22.43	-0.16%	17	256,201.2	8.57%	496.2	4.99%
IT	2,094.35	2,139.79	-45.43	-2.12%	9	23,155.6	0.77%	294.7	2.97%
Textiles	1,165.97	1,157.18	8.79	0.76%	56	117,684.0	3.94%	1,473.2	14.83%
Paper & Printing	5,723.31	5,844.96	-121.64	-2.08%	3	10,942.4	0.37%	74.7	0.75%
Tannery	1,951.66	1,950.16	1.50	0.08%	6	20,893.9	0.70%	165.7	1.67%
Jute	10,177.75	9,760.05	417.70	4.28%	3	2,249.3	0.08%	57.9	0.58%
Ceramics	485.63	483.28	2.36	0.49%	5	24,623.3	0.82%	171.9	1.73%
Miscellaneous	1,896.58	1,908.59	-12.00	-0.63%	13	105,235.3	3.52%	560.0	5.64%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
ICB AMCL Sonali Bank Limited 1st Mutual Fund	7.70	10.0%	6.5
Chittagong Vegetable	92.90	9.9%	13.3
Khan Brothers PP Woven Bag Industries Limited	6.70	9.8%	2.0
M.I. Cement Factory Limited	50.30	9.8%	4.2
Vanguard AML Rupali Bank Balanced Fund	5.60	9.8%	4.8
ICB AMCL Third NRB Mutual Fund	6.00	9.1%	13.3
Vanguard AML BD Finance Mutual Fund One	6.20	8.8%	4.1
Sonali Aansh	407.80	8.7%	7.1
ICB AMCL First Agrani Bank Mutual Fund	7.60	8.6%	18.5
ICB Employees Provident MF 1 Scheme 1	7.60	8.6%	16.7

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Shaympur Sugar	26.20	-7.7%	.3
Sunlife Insurance Company Limited	18.30	-7.1%	.7
Hakkani Pulp & Paper	62.50	-6.4%	30.9
Samata Leather	145.60	-5.9%	24.1
Silva Pharmaceuticals Limited	17.60	-5.9%	47.8
Aamra Network Limited	41.10	-5.3%	17.2
Sinobangla Industries	61.20	-4.7%	60.8
Indo-Bangla Pharmaceuticals Limited	24.50	-4.7%	143.5
Dhaka Insurance Limited	33.50	-4.6%	10.7
Oimex Electrode Limited	27.70	-4.5%	38.8

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Summit Power	44.10	3.8%	422.3
LafargeHolcim Bangladesh Limited	48.90	-3.2%	244.8
Khulna Power Company Limited	57.30	-3.7%	229.5
Orion Pharma Ltd.	46.10	5.0%	185.5
National Tubes	128.40	4.3%	183.5
Shepherd Industries Limited	24.80	2.5%	177.8
Grameenphone Ltd.	264.50	1.0%	164.3
Paramount Textile Limited	63.20	3.6%	151.2
Golden Harvest Agro Industries Ltd.	21.50	0.5%	147.6
Indo-Bangla Pharmaceuticals Limited	24.50	-4.7%	143.5



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	4,740.40	4,768.14	-27.74	-0.58%	6.46%
DS30	1,590.88	1,599.01	-8.13	-0.51%	5.12%
DSES	1,081.34	1,083.70	-2.36	-0.22%	8.15%
CDSET	951.05	956.13	-5.08	-0.53%	5.70%

	Advanced	Declined	Unchanged	Total
All Category	132	188	35	355
A Category (Equity)	87	151	20	258
B Category (Equity)	23	22	3	48
N Category (Equity)	0	1	1	2
Z Category (Equity)	22	14	11	47
Mutual Funds	22	5	10	37
Corporate Bonds	0	1	1	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,561,602.3	3,571,629.3	
	Mn USD	42,843.8	42,964.4	-0.3%
Turnover	Mn BDT	10,213.4	9,763.9	4.6%
	Mn USD	122.9	117.5	
Volume	Mn Shares	382.9	382.4	0.1%
		221,329	221,329	0.0%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	357.2	12.0%	164.27	10.3x	8.4x
British American Tobacco Bangladesh Company Limited	197.3	6.6%	125.38	22.9x	8.1x
Square Pharmaceuticals	174.5	5.8%	130.08	13.2x	2.7x
United Power Generation & Distribution Company Ltd	136.9	4.6%	31.95	16.9x	9.3x
Renata Ltd.	98.7	3.3%	14.55	24.4x	5.4x
Investment Corporation of Bangladesh	67.2	2.3%	9.88	NM	3.2x
Berger Paints	65.9	2.2%	14.76	27.1x	9.8x
BRAC Bank	60.8	2.0%	91.34	11.8x	1.6x
LafargeHolcim Bangladesh Limited	56.8	1.9%	244.84	31.5x	3.7x
Marico Bangladesh Limited	53.6	1.8%	.00	20.6x	36.4x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	114.4	9.4%	130.08	13.2x	2.7x
British American Tobacco Bangladesh Company Limited	52.2	4.3%	125.38	22.9x	8.1x
Renata Ltd.	48.2	3.9%	14.55	24.4x	5.4x
Grameenphone Ltd.	35.7	2.9%	164.27	10.3x	8.4x
BRAC Bank	33.9	2.8%	91.34	11.8x	1.6x
Olympic Industries	29.6	2.4%	19.80	20.5x	6.5x
Beximco Pharmaceuticals	27.2	2.2%	27.51	9.6x	1.1x
LafargeHolcim Bangladesh Limited	20.1	1.6%	244.84	31.5x	3.7x
Eastern Bank	19.7	1.6%	1.87	8.8x	1.2x
Pubali Bank	17.8	1.5%	3.08	6.8x	0.9x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
Al-Arafah Islami Bank Ltd	14.60	14.60	87.60	6,000,000	1
BRAC Bank	51.00	50.90	1.02	20,000	2
Indo-Bangla Pharmaceuticals Limited	25.10	25.10	1.26	50,000	1
ICB AMCL First Agrani Bank Mutual Fund	7.00	7.00	0.50	72,000	1
Kohinoor Chemicals	375.00	375.00	37.50	100,000	1
LafargeHolcim Bangladesh Limited	54.40	54.40	4.65	85,500	1
Northern Jute	504.50	504.50	8.67	17,178	1
Peoples Insurance	20.30	20.20	6.94	342,500	2
Progressive Life Ins	130.20	130.20	2.15	16,500	1
SK Trims & Industries Limited	63.00	62.00	9.40	150,000	2
Sonar Bangla Ins	41.10	41.10	4.13	100,500	2
Square Textile	34.50	34.50	0.65	18,731	1
Standard Ceramic	548.00	507.00	1.69	3,250	2
Summit Power	46.20	46.20	110.88	2,400,000	111

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

Important DSE News

TOSRIFA

Mrs. Lyra Rizwana Hassan, one of the Directors of the Company has expressed her intention to transfer 10,00,000 shares out of his total holding of 69,78,050 shares to her Spouse Mr. Mohim Hassan, another Sponsor Directors of the Company, by way of gift outside the trading system of the Exchange within 30 working days from the date of issuance of approval letter by DSE.

Mrs. Anjuman Ara Begum, one of the Directors of the Company has expressed her intention to transfer 18,49,865 shares out of his total holding of 53,49,865 shares to her Spouse Mr. Naim Hassan, another Sponsor Directors of the Company, by way of gift outside the trading system of the Exchange within 30 working days from the date of issuance of approval letter by DSE.

SQURPHARMA

The Company has informed that the Board of Directors has taken the following decisions i) The Company shall establish a virtually wholly owned subsidiary Company in the name and style of "Square Lifesciences Ltd." in order to manufacture pharmaceuticals Oral Solid Dosage products. ii) Initial estimated total cost will be Tk. 350.00 crore and to be financed by internally generated funds by the Square Pharmaceuticals Ltd. /Sponsors of Square Lifesciences Ltd. and iii) It is expected that the project would be completed by June, 2023