

Daily Market Update

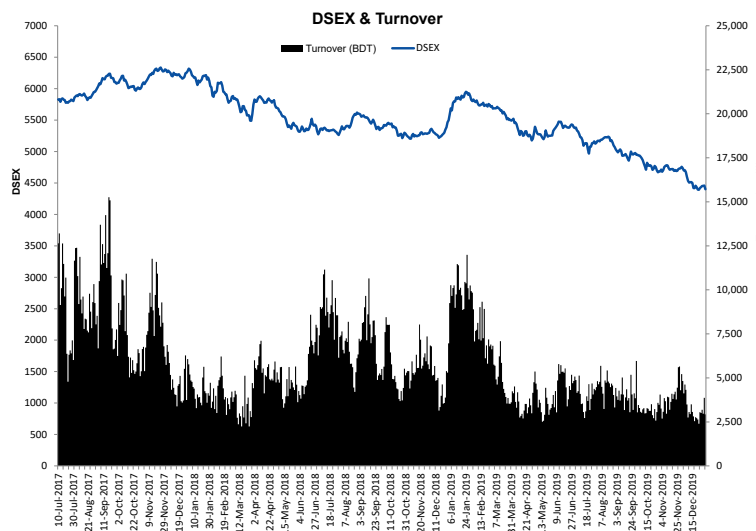
Market closed in red today. The benchmark index DSEX (-1.33%) lost 59.15 points and closed at 4,400.14 points. The blue chip index DS30 (-1.71%), the Shariah-based index DSES (-1.38%), and the large cap index CDSET (-1.45%) all closed in red. The large cap sectors showed negative performance today except Food & Allied (+0.03%). Power experienced the highest loss of 1.73% followed by Pharmaceuticals (-1.49%), NBFIs (-1.41%), Banks (-1.26%), Engineering (-1.16%), and Telecommunication (-0.24%). Turnover stood at BDT 2.9 billion (USD 35.2 million). Khulna Power Company Limited (+2.3%) was the most traded share with a turnover of BDT 190.7 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,267.61	1,283.80	-16.19	-1.26%	30	517,382.1	18.47%	429.8	14.93%
NBFIs	1,552.63	1,574.84	-22.21	-1.41%	23	143,538.4	5.13%	68.2	2.37%
Mutual Funds	590.35	593.61	-3.26	-0.55%	37	30,679.1	1.10%	41.0	1.42%
General Insurance	1,924.90	1,941.71	-16.81	-0.87%	35	52,007.4	1.86%	268.2	9.31%
Life Insurance	2,126.23	2,176.15	-49.92	-2.29%	12	59,282.5	2.12%	55.4	1.93%
Telecommunication	3,943.32	3,952.99	-9.67	-0.24%	2	396,331.1	14.15%	27.1	0.94%
Pharmaceuticals	2,457.49	2,494.63	-37.14	-1.49%	32	463,492.3	16.55%	269.3	9.35%
Fuel & Power	1,531.26	1,558.19	-26.93	-1.73%	20	379,597.9	13.55%	272.9	9.48%
Cement	1,187.42	1,191.53	-4.11	-0.35%	7	72,213.6	2.58%	107.6	3.74%
Services & Real Estate	917.80	909.25	8.55	0.94%	8	36,643.0	1.31%	29.9	1.04%
Engineering	2,299.63	2,326.53	-26.89	-1.16%	39	149,232.8	5.33%	485.1	16.85%
Food & Allied	12,320.06	12,316.10	3.95	0.03%	17	227,544.5	8.12%	103.5	3.59%
IT	1,821.94	1,851.35	-29.41	-1.59%	9	20,143.8	0.72%	99.9	3.47%
Textiles	1,040.57	1,066.41	-25.84	-2.42%	56	99,559.2	3.55%	274.1	9.52%
Paper & Printing	5,203.78	5,359.23	-155.45	-2.90%	3	9,949.2	0.36%	15.4	0.53%
Tannery	1,812.14	1,835.55	-23.41	-1.28%	6	19,400.2	0.69%	40.7	1.41%
Jute	11,907.92	11,693.85	214.07	1.83%	3	2,631.7	0.09%	55.6	1.93%
Ceramics	461.93	478.12	-16.19	-3.39%	5	22,311.0	0.80%	73.9	2.57%
Miscellaneous	1,777.64	1,785.17	-7.53	-0.42%	13	98,635.5	3.52%	161.7	5.61%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Emerald Oil Industries Ltd.	14.70	9.7%	.9
Meghna Condensed Milk	15.40	7.7%	1.4
United Airways (BD) Ltd.	1.50	7.1%	.9
S. S. Steel Limited	23.40	6.8%	55.7
Mithun Knitting	9.00	5.9%	.3
Meghna Pet Industries	11.60	5.5%	.3
Pragati Insurance	38.90	4.9%	.0
Bangladesh Building Systems Ltd.	18.40	4.5%	22.0
Shaympur Sugar	24.90	4.2%	.6
First Finance Limited	5.00	4.2%	.5

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Generation Next Fashions Limited	2.60	-7.1%	.8
Zaheen Spinning Limited	9.20	-7.1%	14.5
Samata Leather	145.80	-6.5%	8.7
Standard Ceramic	674.40	-6.3%	55.1
City Bank	18.60	-6.1%	72.3
Olympic Accessories Limited	6.40	-5.9%	3.7
SEML FBLSL Growth Fund	9.90	-5.7%	10.6
Rahim Textile	243.80	-5.7%	3.9
Information Services Network Ltd.	38.50	-5.6%	2.4
Runner Automobiles Limited	58.00	-5.4%	7.8

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Khulna Power Company Limited	53.10	2.3%	190.7
LafargeHolcim Bangladesh Limited	36.80	0.3%	103.6
Bank Asia Ltd.	17.80	-0.6%	94.4
National Tubes	128.50	3.5%	91.8
City Bank	18.60	-6.1%	72.3
Pioneer Insurance	39.00	2.9%	71.9
Beacon Pharmaceuticals Limited	44.60	-2.6%	61.4
S. S. Steel Limited	23.40	6.8%	55.7
Standard Ceramic	674.40	-6.3%	55.1
Trust Bank	26.90	1.1%	53.3



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,400.14	4,459.29	-59.15	-1.33%	-1.19%
DS30	1,480.32	1,506.13	-25.81	-1.71%	-2.18%
DSES	995.43	1,009.41	-13.98	-1.38%	-0.44%
CDSET	882.87	895.86	-12.99	-1.45%	-1.88%

	Advanced	Declined	Unchanged	Total
All Category	52	269	33	354
A Category (Equity)	30	196	24	250
B Category (Equity)	4	37	2	43
N Category (Equity)	2	6	1	9
Z Category (Equity)	16	30	6	52
Mutual Funds	3	17	17	37
Corporate Bonds	0	1	0	1

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,376,288.0	3,408,110.4	-0.9%
	Mn USD	40,614.6	40,997.4	
Turnover	Mn BDT	2,924.7	3,868.3	-24.4%
	Mn USD	35.2	46.5	
Volume	Mn Shares	107.8	147.4	-26.9%
Trade		103,119	122,470	-15.8%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	381.3	13.6%	8.36	11.0x	9.0x
British American Tobacco Bangladesh Company Limited	178.6	6.4%	18.34	20.7x	7.3x
Square Pharmaceuticals	156.9	5.6%	21.38	12.2x	2.4x
United Power Generation & Distribution Company Ltd	128.9	4.6%	19.40	15.2x	8.8x
Renata Ltd.	95.5	3.4%	7.45	24.2x	5.3x
Berger Paints	64.7	2.3%	1.43	27.9x	9.7x
BRAC Bank	62.5	2.2%	29.19	12.2x	1.6x
Investment Corporation of Bangladesh	59.6	2.1%	.17	NM	2.9x
Marico Bangladesh Limited	52.5	1.9%	7.94	21.0x	35.6x
LafargeHolcim Bangladesh Limited	42.7	1.5%	103.64	23.7x	2.8x

2019 would be Tk. 0.44 and NAV per share would be Tk. 23.85 (Considering Post-IPO 64,651,666 number of shares).

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	102.9	9.1%	21.38	12.2x	2.4x
British American Tobacco Bangladesh Company Limited	47.2	4.2%	18.34	20.7x	7.3x
Renata Ltd.	46.7	4.1%	7.45	24.2x	5.3x
Grameenphone Ltd.	38.1	3.4%	8.36	11.0x	9.0x
BRAC Bank	34.8	3.1%	29.19	12.2x	1.6x
Beximco Pharmaceuticals	23.1	2.0%	5.90	8.5x	0.9x
Olympic Industries	23.0	2.0%	3.74	16.3x	5.1x
Eastern Bank	17.9	1.6%	1.59	8.0x	1.1x
Pubali Bank	17.2	1.5%	4.25	6.6x	0.8x
National Bank	15.5	1.4%	5.45	6.7x	0.5x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Kattali Textile Limited	11.50	11.50	0.52	45,000	1
Navana CNG Limited	39.00	39.00	2.46	63,000	3
The Premier Bank	12.50	12.50	0.75	60,000	1
Regent Textile Mills Limited	10.40	10.40	3.16	304,000	1
Sonar Bangla Ins	40.00	40.00	2.62	65,500	1
Square Pharmaceuticals	171.90	171.90	6.88	40,000	1
Standard Insurance	38.00	38.00	2.09	55,000	2
Uttara Bank	24.50	24.50	26.95	1,100,000	1

Important DSE News

CNW

Trading of the shares of ADN Telecom Limited will commence at DSE from January 06, 2020 under 'N' category. DSE Trading Code for ADN Telecom Limited is "ADNTEL" and DSE Company Code is 22651.

ADN Telecom Limited: (Q1): As per un-audited first quarter (Q1) financial statements, profit after tax was Tk. 28.45 million and basic EPS of Tk. 0.63 for the 3 (three) months period ended on 30 September 2019 (July-September 2019) as against profit after tax of Tk. 21.62 million and basic EPS of Tk. 0.48 for the same period of the previous year. However, Pre-IPO Net Asset Value per Share (NAV) was Tk. 21.67 (Considering Pre-IPO paid-up number of shares) as on 30 September 2019. Q1 Financials of ADN Telecom Limited): It is to be noted that basic EPS has been calculated based on weighted average Pre-IPO paid-up number of shares i.e. 44,860,000 shares for both the periods. Moreover, Company's post-IPO basic EPS for the 3 (three) months period ended on 30 September