

Daily Market Update

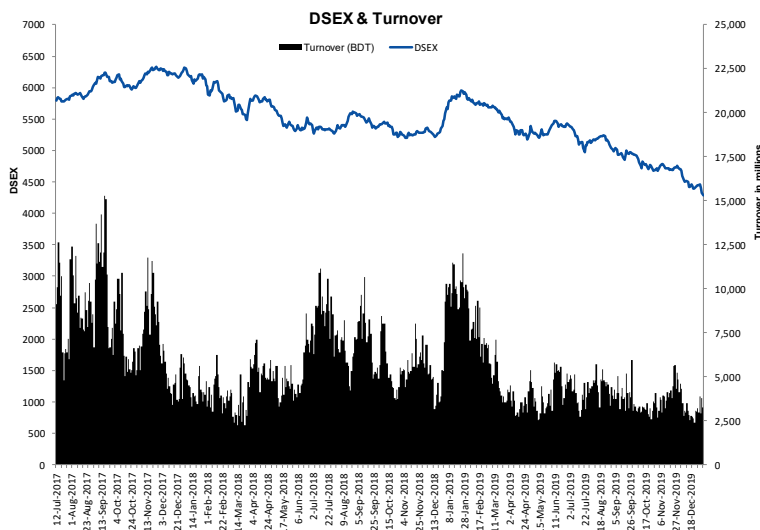
Market closed in red today. The benchmark index DSEX (-1.17%) lost 50.52 points and closed at 4,281.44 points. The blue chip index DS30 (-1.08%), the Shariah-based index DSES (-1.03%), and the large cap index CDSET (-1.05%) all closed in red. All the large cap sectors showed negative performance today. Banks experienced the highest loss of 1.58% followed by Food & Allied (-1.07%), Pharmaceuticals (-1.06%), Telecommunication (-1.05%), Engineering (-0.63%), NBFIs (-0.54%) and Power (-0.54%). Turnover stood at BDT 3.3 billion (USD 39.4 million). ADN Telecom Limited (-0.7%) was the most traded share with a turnover of BDT 276.4 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,222.76	1,242.35	-19.59	-1.58%	30	499,075.6	18.27%	463.2	14.83%
NBFIs	1,503.08	1,511.20	-8.11	-0.54%	23	138,958.2	5.09%	69.0	2.21%
Mutual Funds	583.72	588.08	-4.36	-0.74%	37	30,334.6	1.11%	36.5	1.17%
General Insurance	1,888.31	1,906.46	-18.16	-0.95%	35	51,018.6	1.87%	369.3	11.82%
Life Insurance	2,015.59	2,069.37	-53.78	-2.60%	12	56,197.6	2.06%	68.6	2.19%
Telecommunication	3,798.84	3,839.31	-40.47	-1.05%	2	381,809.8	13.98%	31.7	1.02%
Pharmaceuticals	2,398.84	2,424.53	-25.69	-1.06%	32	452,430.4	16.56%	236.6	7.57%
Fuel & Power	1,511.52	1,519.70	-8.17	-0.54%	20	374,704.7	13.72%	188.3	6.03%
Cement	1,222.29	1,218.83	3.47	0.28%	7	74,334.5	2.72%	223.0	7.14%
Services & Real Estate	883.19	897.73	-14.54	-1.62%	8	35,261.2	1.29%	19.6	0.63%
Engineering	2,256.66	2,270.99	-14.33	-0.63%	39	146,444.3	5.36%	413.9	13.25%
Food & Allied	12,089.54	12,220.23	-130.69	-1.07%	17	223,287.0	8.17%	96.9	3.10%
IT	1,956.86	2,018.77	-61.91	-3.07%	9	21,635.5	0.79%	361.5	11.57%
Textiles	1,012.77	1,031.04	-18.26	-1.77%	56	96,900.1	3.55%	235.1	7.52%
Paper & Printing	5,043.88	5,163.68	-119.79	-2.32%	3	9,643.4	0.35%	11.0	0.35%
Tannery	1,786.37	1,804.36	-18.00	-1.00%	6	19,124.3	0.70%	41.6	1.33%
Jute	11,257.60	11,654.84	-397.24	-3.41%	3	2,488.0	0.09%	25.9	0.83%
Ceramics	459.21	460.81	-1.61	-0.35%	5	22,179.3	0.81%	99.2	3.17%
Miscellaneous	1,729.05	1,756.89	-27.84	-1.58%	13	95,939.5	3.51%	133.6	4.28%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Delta Spinnings Ltd.	4.90	8.9%	4.6
S. S. Steel Limited	23.30	7.4%	69.1
Emerald Oil Industries Ltd.	17.20	6.8%	17.3
Standard Ceramic	708.20	5.6%	85.5
C & A Textiles Limited	1.90	5.6%	.2
Beximco Synthetics	4.00	5.3%	1.0
Aramit Cement Limited	15.20	4.8%	.0
ICB Islamic Bank	2.80	3.7%	.1
IFAD Autos Limited	47.50	3.0%	47.2
Fareast Finance & Investment Limited	3.50	2.9%	.6

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Zeal Bangla Sugar Mills	30.90	-9.9%	.0
Al-Haj Textile Mills Limited	36.60	-7.6%	2.2
BIFC	2.50	-7.4%	.1
Zaheen Spinning Limited	8.60	-6.5%	17.0
Progressive Life Ins	121.90	-6.4%	39.0
Hwa Well Textiles (BD) Limited	31.30	-6.3%	.4
Savar Refractories	108.00	-6.0%	.5
Sunlife Insurance Company Limited	18.90	-6.0%	1.5
Sinobangla Industries	70.30	-5.8%	51.9
Silco Pharmaceuticals Limited	29.70	-5.7%	12.2

Most Traded Share	Close	Δ%	Turnover (mn BDT)
ADN Telecom Limited	40.20	-0.7%	276.4
LafargeHolcim Bangladesh Limited	40.10	1.8%	210.7
BRAC Bank	45.00	-4.9%	156.6
Khulna Power Company Limited	51.30	-2.5%	98.6
Standard Ceramic	708.20	5.6%	85.5
Paramount Insurance	40.30	-1.0%	69.5
S. S. Steel Limited	23.30	7.4%	69.1
Mutual Trust Bank	27.20	0.7%	56.9
Pubali Bank	24.40	-0.4%	56.1
City Bank	17.50	-2.8%	53.0



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,281.44	4,331.96	-50.52	-1.17%	-3.85%
DS30	1,436.27	1,451.90	-15.63	-1.08%	-5.09%
DSES	972.98	983.14	-10.16	-1.03%	-2.69%
CDSET	861.36	870.48	-9.12	-1.05%	-4.27%

	Advanced	Declined	Unchanged	Total
All Category	42	269	43	354
A Category (Equity)	22	197	30	249
B Category (Equity)	7	35	1	43
N Category (Equity)	2	7	1	10
Z Category (Equity)	11	30	11	52
Mutual Funds	1	20	15	36
Corporate Bonds	1	0	0	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,306,628.7	3,337,128.2	
	Mn USD	39,776.6	40,143.5	-0.9%
Turnover	Mn BDT	3,274.6	3,758.2	-12.9%
	Mn USD	39.4	45.2	
Volume	Mn Shares	112.1	133.9	-16.2%
Trade		122,482	114,495	7.0%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	367.3	13.5%	15.67	10.6x	8.7x
British American Tobacco Bangladesh Company Limited	175.6	6.4%	18.06	20.4x	7.2x
Square Pharmaceuticals	152.5	5.6%	43.03	11.9x	2.3x
United Power Generation & Distribution Company Ltd	126.5	4.6%	15.84	14.9x	8.6x
Renata Ltd.	94.8	3.5%	6.57	24.0x	5.2x
Berger Paints	63.4	2.3%	1.66	27.3x	9.5x
Investment Corporation of Bangladesh	57.5	2.1%	1.02	NM	2.8x
BRAC Bank	55.5	2.0%	156.59	10.8x	1.4x
Marico Bangladesh Limited	51.3	1.9%	.73	20.5x	34.8x
LafargeHolcim Bangladesh Limited	46.6	1.7%	210.69	25.9x	3.0x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	100.0	9.1%	43.03	11.9x	2.3x
British American Tobacco Bangladesh Company Limited	46.4	4.2%	18.06	20.4x	7.2x
Renata Ltd.	46.3	4.2%	6.57	24.0x	5.2x
Grameenphone Ltd.	36.7	3.3%	15.67	10.6x	8.7x
BRAC Bank	30.9	2.8%	156.59	10.8x	1.4x
Olympic Industries	22.5	2.0%	3.90	16.0x	4.9x
Beximco Pharmaceuticals	22.3	2.0%	5.44	8.2x	0.9x
Eastern Bank	17.7	1.6%	1.21	7.9x	1.1x
Pubali Bank	17.6	1.6%	56.11	6.7x	0.9x
LafargeHolcim Bangladesh Limited	16.4	1.5%	210.69	25.9x	3.0x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
British American Tobacco Bangladesh Company Limited	980.00	980.00	4.90	5,000	1
BRAC Bank	47.60	47.60	35.70	750,000	3
Golden Harvest Agro Industries Ltd.	20.20	20.20	4.91	243,000	2
Standard Ceramic	675.00	625.00	103.78	159,786	53
Standard Insurance	42.50	42.50	0.77	18,000	1

Important DSE News

GEMINISEA

Qualified Opinion: i. The Company charged Contribution to WPPF regularly as an expenses according to the Bangladesh Labour Act (Amendments), 2013 but the contribution has not been transferred regularly to Workers' Profit Participation Fund Trust. Moreover, we checked the Gemini Sea Food Ltd. Workers' Profit Participation Fund Trust bank account and found that only two years i.e. 2013-2014 & 2014-2015 contribution to WPPF has been transferred from Company account to fund account but no amount has been disbursed to the workers so far.