

Daily Market Update

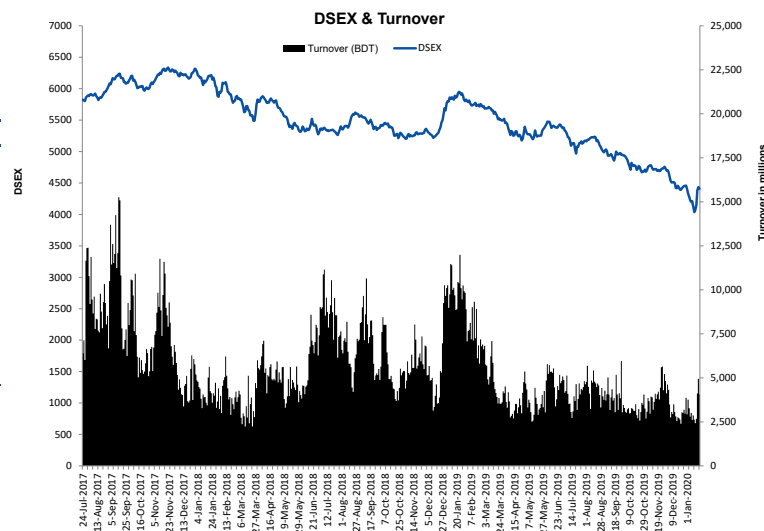
Market closed in red today. The benchmark index DSEX (-0.59%) lost 26.13 points and closed at 4,408.11 points. The blue chip index DS30 (-0.51%), the Shariah-based index DSES (-0.72%), and the large cap index CDSET (-0.45%) all closed in red. All the large cap sectors showed negative performance today except NBFIs (+3.53%). Telecommunication experienced the highest loss of (-2.09%) followed by Engineering (-1.27%), Food & Allied (-0.69%), Pharmaceuticals (-0.40%), Power (-0.31%), and Banks (-0.26%). Turnover stood at BDT 4.1 billion (USD 48.9 million). LafargeHolcim Bangladesh Limited (+1.2%) 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	1,283.02	1,286.43	-3.40	-0.26%	30	522,961.8	18.63%	416.8	10.49%
NBFIs	1,600.55	1,546.03	54.52	3.53%	23	147,969.8	5.27%	92.9	2.34%
Mutual Funds	578.26	584.07	-5.81	-0.99%	37	30,050.9	1.07%	45.8	1.15%
General Insurance	1,879.52	1,880.27	-0.74	-0.04%	35	50,781.3	1.81%	340.7	8.57%
Life Insurance	2,065.22	2,064.74	0.49	0.02%	12	57,581.4	2.05%	60.7	1.53%
Telecommunication	3,817.63	3,899.16	-81.53	-2.09%	2	383,698.1	13.67%	217.7	5.48%
Pharmaceuticals	2,487.90	2,497.82	-9.92	-0.40%	32	469,228.5	16.71%	605.1	15.22%
Fuel & Power	1,568.72	1,573.60	-4.88	-0.31%	19	388,882.4	13.85%	244.6	6.15%
Cement	1,274.87	1,261.10	13.77	1.09%	7	77,532.0	2.76%	289.3	7.28%
Services & Real Estate	946.66	947.10	-0.44	-0.05%	8	37,795.4	1.35%	64.9	1.63%
Engineering	2,178.68	2,206.68	-27.99	-1.27%	39	141,914.5	5.05%	515.1	12.96%
Food & Allied	12,407.62	12,494.17	-86.54	-0.69%	17	229,126.9	8.16%	138.5	3.48%
IT	1,921.32	1,937.73	-16.41	-0.85%	9	21,242.6	0.76%	192.0	4.83%
Textiles	975.66	996.59	-20.94	-2.10%	56	98,475.4	3.51%	363.9	9.16%
Paper & Printing	4,919.73	5,050.43	-130.71	-2.59%	3	9,406.1	0.34%	10.3	0.26%
Tannery	1,776.14	1,784.49	-8.35	-0.47%	6	19,014.9	0.68%	63.9	1.61%
Jute	8,665.56	9,236.01	-570.45	-6.18%	3	1,915.1	0.07%	48.4	1.22%
Ceramics	451.50	447.81	3.70	0.83%	5	22,892.8	0.82%	51.8	1.30%
Miscellaneous	1,753.11	1,764.22	-11.11	-0.63%	13	97,274.3	3.46%	212.2	5.34%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Investment Corporation of Bangladesh	85.10	9.9%	11.4
Sea Pearl Beach Resort & Spa Limited	54.70	8.1%	50.4
Premier Cement Mills Limited	49.00	7.0%	.3
Karnaphuli Insurance	24.20	6.6%	41.6
Green Delta Insurance	50.30	5.9%	.1
Social Islami Bank	14.60	5.8%	4.8
Rupali Life Insurance Co. Ltd.	46.50	5.0%	35.0
Salvo Chemical Industry Limited	10.60	5.0%	1.0
Quasem Industries Limited	39.20	4.0%	43.4
Heidelberg Cement	157.30	3.9%	3.6

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Silco Pharmaceuticals Limited	26.70	-9.8%	62.6
Zeal Bangla Sugar Mills	28.10	-9.4%	.0
Fareast Finance & Investment Limited	3.00	-9.1%	.1
Northern Jute	419.10	-8.0%	45.4
AIBL 1st Islamic Mutual Fund	6.80	-6.8%	.0
Ring Shine Textiles Limited	7.00	-6.7%	65.1
Evince Textile Limited	9.00	-6.3%	9.4
Coppertech Industries Limited	21.40	-6.1%	17.9
Miracle Ind.	20.20	-6.0%	13.8
Stylecraft Limited	193.20	-6.0%	24.7

Most Traded Share	Close	Δ%	Turnover (mn BDT)
LafargeHolcim Bangladesh Limited	41.70	1.2%	276.4
Square Pharmaceuticals	195.10	-0.1%	273.5
Grameenphone Ltd.	272.80	-2.1%	160.7
Khulna Power Company Limited	53.00	2.3%	124.1
S. S. Steel Limited	13.70	2.2%	114.3
ADN Telecom Limited	41.10	0.2%	98.1
Beacon Pharmaceuticals Limited	48.90	0.8%	87.0
Paramount Textile Limited	61.40	1.0%	79.4
SK Trims & Industries Limited	49.20	0.0%	79.4
Singer Bangladesh	170.60	-2.0%	78.9



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,408.11	4,434.24	-26.13	-0.59%	-1.01%
DS30	1,507.14	1,514.89	-7.75	-0.51%	-0.41%
DSES	1,007.65	1,014.95	-7.30	-0.72%	0.78%
CDSET	904.96	909.08	-4.12	-0.45%	0.58%

	Advanced	Declined	Unchanged	Total
All Category	79	237	40	356
A Category (Equity)	57	168	28	253
B Category (Equity)	7	35	3	45
N Category (Equity)	3	4	1	8
Z Category (Equity)	12	30	8	50
Mutual Funds	4	21	12	37
Corporate Bonds	1	1	0	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,377,354.6	3,391,162.3	
	Mn USD	40,627.4	40,793.5	-0.4%
Turnover	Mn BDT	4,068.1	4,948.0	-17.8%
	Mn USD	48.9	59.5	
Volume	Mn Shares	144.4	178.9	-19.3%
Trade		125,922	141,422	-11.0%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	368.4	13.1%	160.66	10.6x	8.7x
British American Tobacco Bangladesh Company Limited	175.1	6.2%	34.46	20.3x	7.2x
Square Pharmaceuticals	164.7	5.9%	273.47	12.8x	2.5x
United Power Generation & Distribution Company Ltd	139.3	5.0%	37.01	16.4x	9.5x
Renata Ltd.	97.3	3.5%	32.60	24.7x	5.4x
Investment Corporation of Bangladesh	65.3	2.3%	11.42	NM	3.1x
Berger Paints	64.2	2.3%	25.89	27.7x	9.6x
BRAC Bank	63.1	2.3%	52.99	12.3x	1.6x
Marico Bangladesh Limited	51.2	1.8%	2.75	20.5x	34.8x
LafargeHolcim Bangladesh Limited	48.4	1.7%	276.38	26.9x	3.2x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	108.0	9.6%	273.47	12.8x	2.5x
Renata Ltd.	47.5	4.2%	32.60	24.7x	5.4x
British American Tobacco Bangladesh Company Limited	46.3	4.1%	34.46	20.3x	7.2x
Grameenphone Ltd.	36.8	3.3%	160.66	10.6x	8.7x
BRAC Bank	35.2	3.1%	52.99	12.3x	1.6x
Olympic Industries	27.7	2.4%	18.74	19.6x	6.1x
Beximco Pharmaceuticals	25.2	2.2%	22.24	9.2x	1.0x
Eastern Bank	18.8	1.7%	13.52	8.4x	1.1x
Pubali Bank	17.3	1.5%	1.53	6.6x	0.9x
LafargeHolcim Bangladesh Limited	17.1	1.5%	276.38	26.9x	3.2x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
Beacon Pharmaceuticals Limited	48.50	48.50	4.85	100,000	1
BRAC Bank	51.80	51.80	20.72	400,000	1
Beximco Pharmaceuticals	69.40	69.40	11.81	170,125	1
First Finance Limited	5.50	5.50	0.61	110,000	1
Pioneer Insurance	41.00	41.00	1.23	30,000	1
Pragati Life Insurance	119.60	119.60	0.67	5,600	1
Silco Pharmaceuticals Limited	31.00	31.00	0.93	30,000	1
Sinobangla Industries	62.00	62.00	1.01	16,300	2
SK Trims & Industries Limited	49.00	49.00	4.80	98,000	1
Square Pharmaceuticals	196.70	196.70	42.29	215,000	1
Standard Ceramic	570.00	570.00	2.85	5,000	2

Important DSE News

SONARGAON

The Company will be placed in 'B' category from existing 'Z' category with effect from January 22, 2020 as the Company has reported disbursement of 3% cash dividend for the year ended on June 30, 2019.

SQURPHARMA

Mrs. Ratna Patra, one of the Directors of the Company, has expressed her intention to buy 3,00,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchanges (DSE & CSE) within next 30 working days.

Mr. Anjan Chowdhury, one of the Directors of the Company, has expressed his intention to buy 3,00,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchanges (DSE & CSE) within next 30 working days.

ETL

Consolidated EPS was Tk. 0.13 for October-December 2019 as against Tk. 0.30 for October-December 2018; Consolidated EPS was Tk. 0.32 for July-December 2019 as against Tk. 0.64 for July-December 2018. Consolidated NOCFPS was Tk. 1.42 for July-December 2019 as against Tk. 1.58 for July-December 2018. Consolidated NAV per share was Tk. 14.07 as on December 31, 2019 and Tk. 15.32 as on June 30, 2019.

ARGONDENIM

EPS was Tk. 0.73 for October-December 2019 as against Tk. 0.98 for October-December 2018; EPS was Tk. 1.45 for July-December 2019 as against Tk. 1.73 for July-December 2018. NOCFPS was Tk. 2.38 for July-December 2019 as against Tk. 1.11 for July-December 2018. NAV per share was Tk. 27.01 as on December 31, 2019 and Tk. 27.93 as on June 30, 2019.