

## Daily Market Update

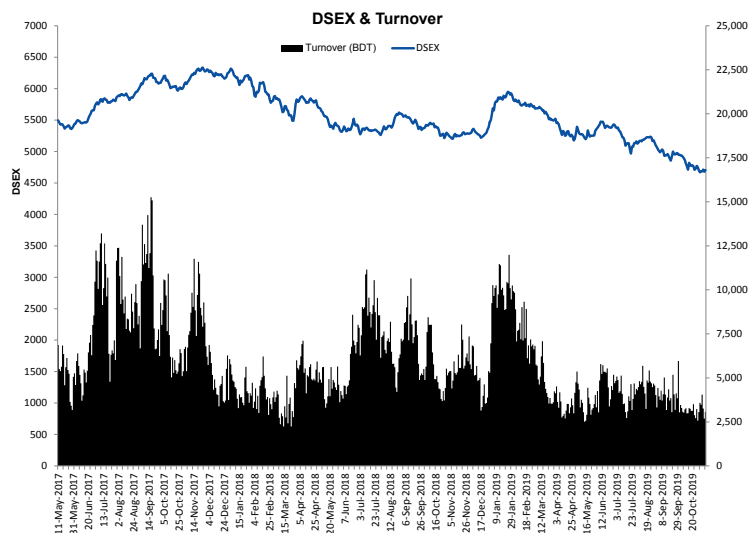
Market closed in green today. The benchmark index DSEX (+0.54%) gained 25.34 points and closed at 4,703.70 points. Both the blue chip index DS30 (+0.65%) and the Shariah based index DSES (+0.64%) closed in green. The large cap sectors showed positive performance today except Telecommunication (-0.43%) and Power (-0.13%). Engineering booked the highest gain of 1.56% followed by Banks (+0.73%), Food & Allied (+0.56%), NBFIs (+0.28%), and Pharmaceuticals (+0.11%). Turnover stood at BDT 3.1 billion (USD 37.0 million). BRAC Bank (+5.2%) was the most traded share with a turnover of BDT 156.7 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,341.37	1,331.64	9.72	0.73%	30	547,487.2	18.27%	392.7	13.17%
NBFIs	1,528.68	1,524.44	4.24	0.28%	23	141,324.2	4.72%	50.9	1.71%
Mutual Funds	594.96	592.04	2.92	0.49%	37	30,918.4	1.03%	81.0	2.72%
General Insurance	1,877.09	1,874.41	2.68	0.14%	35	50,845.1	1.70%	242.8	8.15%
Life Insurance	1,952.77	1,954.25	-1.47	-0.08%	12	54,446.1	1.82%	23.9	0.80%
Telecommunication	4,380.71	4,399.52	-18.81	-0.43%	2	440,291.9	14.69%	26.3	0.88%
Pharmaceuticals	2,707.25	2,704.32	2.94	0.11%	32	510,599.1	17.04%	467.9	15.69%
Fuel & Power	1,695.07	1,697.32	-2.25	-0.13%	20	420,205.2	14.02%	204.2	6.85%
Cement	1,135.58	1,131.83	3.75	0.33%	7	69,060.0	2.30%	22.2	0.75%
Services & Real Estate	874.93	858.00	16.93	1.97%	8	34,280.8	1.14%	47.9	1.61%
Engineering	2,479.46	2,441.38	38.08	1.56%	39	161,484.0	5.39%	552.0	18.51%
Food & Allied	13,902.73	13,825.77	76.96	0.56%	17	255,862.8	8.54%	138.9	4.66%
IT	1,632.38	1,640.40	-8.02	-0.49%	9	18,048.0	0.60%	28.7	0.96%
Textiles	1,052.64	1,037.23	15.40	1.49%	55	102,087.4	3.41%	386.3	12.96%
Paper & Printing	5,239.50	5,063.02	176.47	3.49%	3	10,017.4	0.33%	11.0	0.37%
Tannery	1,970.68	1,985.99	-15.31	-0.77%	6	21,220.9	0.71%	87.9	2.95%
Jute	12,917.25	12,891.49	25.77	0.20%	3	2,854.8	0.10%	5.3	0.18%
Ceramics	474.78	471.92	2.86	0.61%	5	22,931.7	0.77%	97.0	3.25%
Miscellaneous	1,843.19	1,838.97	4.22	0.23%	13	102,272.8	3.41%	114.4	3.84%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Sonargaon Textiles	28.60	10.0%	1.3
BD Welding	16.50	10.0%	1.9
Yeakin Polymer Limited	8.80	10.0%	5.6
National Tubes	169.20	9.9%	143.9
Mozaffar Hossain Spinning Mills Ltd.	9.10	9.6%	4.8
Samata Leather	98.00	9.4%	16.4
Al-Haj Textile Mills Limited	34.00	9.3%	9.0
Shurwid Industries Limited	28.00	8.5%	78.8
Quasem Industries Limited	32.30	8.4%	20.6
Delta Spinnings Ltd.	4.10	7.9%	.4

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Meghna Pet Industries	8.30	-6.7%	.5
Emerald Oil Industries Ltd.	14.80	-5.7%	.6
C & A Textiles Limited	1.90	-5.0%	.4
Popular Life Insurance	88.00	-4.6%	1.6
Appollo Ispat Complex Limited	4.50	-4.3%	5.6
Familytex (BD) Limited	2.40	-4.0%	1.3
Generation Next Fashions Limited	2.50	-3.8%	.5
Matin Spinning Mills Ltd.	30.90	-3.7%	.2
Salvo Chemical Industry Limited	9.00	-3.2%	.2
MBL 1st Mutual Fund	6.20	-3.1%	.1

Most Traded Share	Close	Δ%	Turnover (mn BDT)
BRAC Bank	54.70	5.2%	156.7
National Tubes	169.20	9.9%	143.9
VFS Thread Dyeing Limited	26.80	4.3%	86.5
Sonar Bangla Ins	39.40	0.3%	80.7
Shurwid Industries Limited	28.00	8.5%	78.8
Square Pharmaceuticals	235.90	-0.2%	76.8
Silva Pharmaceuticals Limited	17.50	6.1%	63.0
Standard Ceramic	528.50	4.2%	57.8
Coppertech Industries Limited	26.10	6.1%	51.7
Fortune Shoes Limited	28.20	0.4%	51.2



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,703.70	4,678.36	25.34	0.54%	-12.66%
DS30	1,637.14	1,626.61	10.54	0.65%	-12.95%
DSES	1,081.40	1,074.55	6.84	0.64%	-12.28%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	192	101	57	350
<b>A Category (Equity)</b>	139	79	42	260
<b>B Category (Equity)</b>	23	5	6	34
<b>N Category (Equity)</b>	8	1	0	9
<b>Z Category (Equity)</b>	22	16	9	47
<b>Mutual Funds</b>	17	6	14	37
<b>Corporate Bonds</b>	1	0	0	1

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,557,334.2	3,547,820.5	0.3%
	Mn USD	42,792.4	42,678.0	
Turnover	Mn BDT	3,077.6	2,690.4	14.4%
	Mn USD	37.0	32.4	
Volume	Mn Shares	108.0	94.5	14.2%
Trade		104,188	98,844	5.4%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	422.8	14.1%	26.33	12.1x	10.0x
British American Tobacco Bangladesh Company Limited	202.6	6.8%	18.83	23.5x	8.3x
Square Pharmaceuticals	186.1	6.2%	76.76	14.7x	3.0x
United Power Generation & Distribution Company Ltd	140.6	4.7%	29.78	19.0x	9.5x
Renata Ltd.	103.9	3.5%	35.36	27.7x	6.3x
Berger Paints	67.7	2.3%	2.59	29.2x	10.1x
BRAC Bank	67.5	2.3%	156.70	13.1x	1.8x
Investment Corporation of Bangladesh	56.7	1.9%	.96	94.5x	2.2x
Marico Bangladesh Limited	54.0	1.8%	3.57	21.6x	36.6x
Summit Power	39.5	1.3%	17.83	8.1x	1.5x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	122.0	10.2%	76.76	14.7x	3.0x
British American Tobacco Bangladesh Company Limited	53.6	4.5%	18.83	23.5x	8.3x
Renata Ltd.	50.7	4.2%	35.36	27.7x	6.3x
Grameenphone Ltd.	42.3	3.5%	26.33	12.1x	10.0x
BRAC Bank	37.6	3.1%	156.70	13.1x	1.8x
Beximco Pharmaceuticals	27.5	2.3%	3.51	10.4x	1.1x
Olympic Industries	26.9	2.2%	30.81	20.2x	5.9x
Eastern Bank	19.5	1.6%	2.57	8.7x	1.2x
Pubali Bank	18.3	1.5%	12.30	7.0x	0.9x
National Bank	15.9	1.3%	15.22	6.9x	0.5x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
BRAC Bank	54.40	54.30	82.43	1,516,098	4
Far East Knitting & Dyeing Industries Limited	11.40	11.40	0.83	73,120	1
Genex Infosys Limited	60.00	60.00	1.20	20,000	1
Kattali Textile Limited	14.60	14.60	0.73	50,000	1
Mercantile Insurance	31.90	31.90	2.79	87,500	1
National Tubes	155.00	155.00	1.50	9,690	3
Paramount Textile Limited	50.70	50.70	0.72	14,200	1
Shurwid Industries Limited	27.20	27.00	3.38	125,000	2
United Insurance	52.00	52.00	2.66	51,171	1

### Important DSE News

#### PADMAOIL

The Board of Directors has recommended 130% cash dividend for the year ended on June 30, 2019. Date of AGM: 18.01.2020, Time: 11:00 AM, Venue: Navy Convention Centre, Tiger Pass Circle, Ambagan Road, Chattogram. Record date: 26.11.2019. The Company has also reported EPS of Tk. 29.07, NAV per share of Tk. 142.85 and NOCFPS of Tk. (52.29) for the year ended on June 30, 2019 as against Tk. 34.18, Tk. 126.78 and Tk. (36.37) respectively for the same period of the previous year.

#### PADMAOIL

(Q1 Un-audited): EPS was Tk. 7.49 for July-September 2019 as against Tk. 7.00 for July-September 2018; NOCFPS was Tk. 3.46 for July-September 2019 as against Tk. (17.94) for July-September 2018. NAV per share was Tk. 150.34 as on September 30, 2019 and Tk. 142.85 as on June 30,

2019.

#### EASTRNLAB

The Board of Directors has recommended 100% cash dividend for the year ended on June 30, 2019. Date of AGM: 08.02.2020, Time: 11:00 AM, Venue: Motel Shaikat, Bangladesh Parjatan Corporation Station Road, Chattogram. Record date: 17.12.2019. The Company has also reported EPS of Tk. 23.45, NAV per share of Tk. 182.76 and NOCFPS of Tk. 137.47 for the year ended on June 30, 2019 as against Tk. 36.23, Tk. 169.31 and Tk. 87.26 respectively for the same period of the previous year.

(Q1 Un-audited): EPS was Tk. 1.14 for July-September 2019 as against Tk. 1.65 for July-September 2018; NOCFPS was Tk. 19.40 for July-September 2019 as against Tk. 16.91 for July-September 2018. NAV per share was Tk. 183.90 as on September 30, 2019 and Tk. 182.76 as on June 30, 2019.

The Company has informed that in order to diversify the Company's business, the Board of Directors of the Company has also approved a draft copy of Deed of Agreement made between Eastern Lubricants Blenders Ltd. and Ranks Petroleum Limited, an authorized distributor of Shell Brand Lubricants in Bangladesh, to work together and cooperate each other in selling and distributing of Shell Brand Lubricants in government power sector of Bangladesh.

#### EHL

(Q1 Un-audited): EPS was Tk. 1.27 for July-September 2019 as against Tk. 1.17 for July-September 2018; NOCFPS was Tk. 4.38 for July-September 2019 as against Tk. 0.01 for July-September 2018. NAV per share was Tk. 62.62 as on September 30, 2019 and Tk. 61.35 as on June 30, 2018. The Company also informed that Reconciliation of net income or net profit with cash flows from operating activities making adjustment for non cash items, for non operating items and for the net changes in operating accruals.