

## Daily Market Update

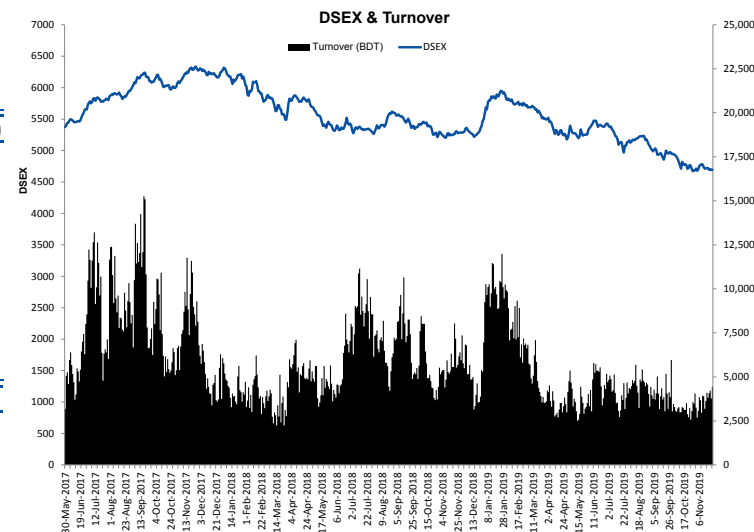
Market closed in green today. The benchmark index DSEX (+0.11%) gained 5.20 points and closed at 4,693.63 points. The blue chip index DS30 (-0.14%) closed in red while the Shariah-based index DSES (+0.08%) closed in green. The large cap sectors showed mixed performance today. NBFIs booked the highest gain of 0.93% followed by Banks (+0.06%), Power (+0.04%), and Food & Allied (+0.00%). Telecommunication experienced the highest loss of 1.25% followed by Engineering (-0.10%) and Pharmaceuticals (-0.07%). Turnover stood at BDT 4.4 billion (USD 53.4 million). Dutch Bangla Bank (+3.1%) was the most traded share with a turnover of BDT 120.3 million.

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Meghna Condensed Milk	11.00	10.0%	.1
Saiham Textile	34.20	10.0%	1.7
Progressive Life Ins	78.70	9.9%	1.0
Al-Haj Textile Mills Limited	44.80	9.8%	29.1
R.N. Spinning Mills Limited	3.40	9.7%	5.8
Miracle Ind.	20.70	9.5%	23.5
Tosrifia Industries Limited	11.60	9.4%	8.4
Sea Pearl Beach Resort & Spa Limited	35.90	8.6%	59.3
Zaheen Spinning Limited	6.10	8.6%	6.5
Meghna Pet Industries	9.00	8.4%	.2

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
BD Autocars	185.50	-8.3%	29.0
Bangas Ltd.	197.30	-7.5%	56.2
Shaympur Sugar	20.00	-6.5%	.1
United Insurance	55.70	-6.4%	4.9
Emerald Oil Industries Ltd.	13.90	-5.4%	.3
First Finance Limited	3.50	-5.4%	.0
Tallu Spinning	3.50	-5.4%	.2
Legacy Footwear	79.10	-5.0%	24.3
Sunlife Insurance Company Limited	15.20	-5.0%	.1
Mithun Knitting	8.30	-4.6%	.2

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Dutch-Bangla Bank	72.70	3.1%	120.3
Fortune Shoes Limited	27.60	3.7%	118.8
Asia Insurance Limited	30.00	3.8%	117.8
Purabi Gen. Insurance Company Ltd.	19.20	1.1%	117.0
Beacon Pharmaceuticals Limited	36.40	-1.6%	110.3
Grameenphone Ltd.	307.80	-1.3%	106.6
BRAC Bank	59.50	-1.0%	106.2
Shurwid Industries Limited	31.00	0.3%	98.7
Sonar Bangla Ins	49.70	-0.4%	94.5
BBS Cables Limited	68.00	0.9%	82.0

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,330.06	1,329.28	0.78	0.06%	30	542,872.6	18.20%	505.8	11.48%
NBFIs	1,612.21	1,597.34	14.87	0.93%	23	149,046.4	5.00%	133.3	3.03%
Mutual Funds	600.82	600.93	-0.11	-0.02%	37	31,223.1	1.05%	72.1	1.64%
General Insurance	1,987.82	1,992.85	-5.03	-0.25%	35	53,844.6	1.80%	702.6	15.95%
Life Insurance	2,110.07	2,086.00	24.07	1.15%	12	58,831.8	1.97%	86.2	1.96%
Telecommunication	4,314.92	4,369.54	-54.62	-1.25%	2	433,679.5	14.54%	173.9	3.95%
Pharmaceuticals	2,701.68	2,703.52	-1.85	-0.07%	32	509,547.7	17.08%	494.2	11.22%
Fuel & Power	1,654.72	1,654.00	0.72	0.04%	20	410,202.4	13.75%	264.2	6.00%
Cement	1,125.67	1,120.46	5.21	0.46%	7	68,457.1	2.29%	25.2	0.57%
Services & Real Estate	935.16	925.72	9.43	1.02%	8	36,640.7	1.23%	97.7	2.22%
Engineering	2,444.33	2,446.88	-2.55	-0.10%	39	158,622.4	5.32%	691.4	15.69%
Food & Allied	13,592.91	13,592.70	0.21	0.00%	17	251,053.4	8.42%	163.7	3.72%
IT	1,687.37	1,686.21	1.16	0.07%	9	18,655.9	0.63%	66.8	1.52%
Textiles	1,065.27	1,046.12	19.15	1.83%	55	103,312.9	3.46%	520.9	11.83%
Paper & Printing	5,270.10	5,210.45	59.65	1.14%	3	10,075.9	0.34%	16.0	0.36%
Tannery	1,846.19	1,849.81	-3.62	-0.20%	6	19,880.4	0.67%	154.8	3.51%
Jute	12,631.28	12,741.43	-110.15	-0.86%	3	2,791.6	0.09%	12.0	0.27%
Ceramics	479.81	483.80	-3.99	-0.82%	5	23,174.5	0.78%	71.6	1.63%
Miscellaneous	1,828.21	1,827.65	0.57	0.03%	13	101,441.8	3.40%	152.8	3.47%



Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,693.63	4,688.43	5.20	0.11%	-12.85%
DS30	1,635.85	1,638.16	-2.31	-0.14%	-13.02%
DSES	1,076.64	1,075.83	0.82	0.08%	-12.67%

	Advanced	Declined	Unchanged	Total
All Category	153	125	58	336
A Category (Equity)	119	95	40	254
B Category (Equity)	13	12	8	33
N Category (Equity)	2	6	1	9
Z Category (Equity)	19	12	9	40
Mutual Funds	7	10	20	37
Corporate Bonds	0	0	0	0

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,542,932.8	3,544,046.5	0.0%
	Mn USD	42,619.2	42,632.6	
Turnover	Mn BDT	4,440.8	3,772.0	17.7%
	Mn USD	53.4	45.4	
Volume	Mn Shares	159.5	134.4	18.7%
Trade		132,206	124,443	6.2%

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Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	415.6	13.9%	106.62	11.9x	9.8x
British American Tobacco Bangladesh Company Limited	196.3	6.6%	27.61	22.8x	8.1x
Square Pharmaceuticals	180.4	6.0%	58.24	14.1x	2.7x
United Power Generation & Distribution Company Ltd	138.3	4.6%	19.66	16.3x	9.4x
Renata Ltd.	104.1	3.5%	10.33	26.4x	5.7x
BRAC Bank	73.4	2.5%	106.23	14.3x	1.9x
Berger Paints	66.4	2.2%	2.45	28.6x	9.9x
Investment Corporation of Bangladesh	61.0	2.0%	2.07	NM	2.1x
Marico Bangladesh Limited	54.3	1.8%	1.46	21.7x	36.9x
Summit Power	40.0	1.3%	7.34	7.7x	1.5x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	118.3	9.8%	58.24	14.1x	2.7x
British American Tobacco Bangladesh Company Limited	51.9	4.3%	27.61	22.8x	8.1x
Renata Ltd.	50.8	4.2%	10.33	26.4x	5.7x
Grameenphone Ltd.	41.6	3.5%	106.62	11.9x	9.8x
BRAC Bank	40.9	3.4%	106.23	14.3x	1.9x
Beximco Pharmaceuticals	28.2	2.3%	.00	10.3x	1.2x
Olympic Industries	26.7	2.2%	14.58	19.0x	5.9x
Eastern Bank	18.9	1.6%	1.24	8.4x	1.2x
Pubali Bank	17.9	1.5%	.72	6.8x	0.9x
National Bank	16.3	1.4%	12.86	7.0x	0.5x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Bank Asia Ltd.	21.40	21.40	20.00	934,500	1
BRAC Bank	61.00	61.00	1.22	20,000	1
Federal Insurance	15.70	15.70	0.53	34,000	1
ICB Employees Provident MF 1 Scheme 1	4.70	4.70	0.71	150,000	1
Mercantile Insurance	36.50	36.50	7.30	200,000	1
Shurwid Industries Limited	30.30	30.30	1.85	61,200	3
S. S. Steel Limited	31.50	31.50	3.15	100,000	1
VFS Thread Dyeing Limited	24.40	24.40	0.63	26,000	1

### Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
GHCL	Global Heavy Chemicals Ltd.		0.0%	5.0%	30-Jun-2019	26-Nov-2019
NAHEEACP	Nahee Aluminum Composite Panel Ltd.		10.0%	5.0%	30-Jun-2019	26-Nov-2019
YPL	Yeakin Polymer Limited		5.0%	0.0%	30-Jun-2019	26-Nov-2019
PADMAOIL	Padma Oil Company Ltd.		0.0%	130.0%	30-Jun-2019	26-Nov-2019

### Important DSE News

#### BDSERVICE

The Board of Directors has recommended No dividend for the year ended on June 30, 2019. Date of AGM: 26.12.2019, Time: 6:30 PM, Venue: InterContinental Dhaka. Record date: 12.12.2019. The Company has also reported EPS of Tk. (3.73), NAV per share of Tk. (2.03) and NOCFPS of Tk. (2.56) for the year ended on June 30, 2019 as against Tk. (5.67), Tk. 0.42 and Tk. 0.53 respectively for the same period of the previous year.

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(Q1 Un-audited): EPS was Tk. 0.44 for July-September 2019 as against Tk. (2.19) for July-September 2018; NOCFPS was Tk. 1.16 for July-September 2019 as against Tk. 0.78 for July-September 2018. NAV per share was Tk. (1.59) as on September 30, 2019 and Tk. (2.03) as on June 30, 2019.

#### AL-HAJTEX

BSEC News: As per BSEC Order No. BSEC/Surveillance/2018-912/91 dated November 24, 2019, the trading of the shares of Al-Haj Textile Mills Limited shall be placed in the Public Market from Compulsory Spot Market with effect from today i.e. November 25, 2019. Moreover, financial adjustment facilities in transactions of the shares of the Company will be applicable as per the existing rules.

#### SSSTEEL

(Q1 Un-audited): EPS was Tk. 0.79 for July-September 2019 as against Tk. 0.32 for July-September 2018; NOCFPS was Tk. 0.14 for July-September 2019 as against Tk. 0.32 for July-September 2018. NAV per share (with revaluation) was Tk. 19.11 as on September 30, 2019 and Tk. 18.33 as on June 30, 2019; NAV per share (without revaluation) was Tk. 16.20 as on September 30, 2019 and Tk. 15.40 as on June 30, 2019.

#### CONFIDCEM

The Company has informed that the Board of Directors has agreed with the decision taken in the Board of Directors of Confidence Power Holdings Limited, an associate of Confidence Cement Limited having 41% stake in its equity capital, that upon successful testing and commissioning the Confidence Power Bogra Limited, a 99% subsidiary of Confidence Power Holdings Ltd, has started commercial operation of its HFO based, Net 113 MW Power Plant situated at Nator-Bogura Highway at Birgram, Bogura, consisting of Unit of MAN Diesel & Turbo SE (Engine) supplied By Germany, XD (Sub-station) by China, MAN (Turbine) and ME (Boiler) by India to sell the whole production of electricity to the Bangladesh Power Development Board (BPDB).

#### GP

Refer to the earlier news disseminated on April 4, 2019 and September 8, 2019 regarding demand from BTRC, the Company has further informed that on November 24, 2019, the Honble Appellate Division has pronounced the order that the stay granted by the Honble High Court division will sustain, subject to the payment of a deposit of Tk. 2000 crore by Grameenphone within the next 3 months. The Company also informed that that they reaffirm their commitment to resolve the audit issue by continuing with the jointly committed transparent process towards an amicable resolution with the Honble ICT Advisor and relevant members of the Government. The company also informed that the existing stay order remains effective and continues to restrain BTRC from taking action based on the incorrect audit report. Therefore, the company look forward to BTRC to immediately comply with the valid injunction order and not to obstruct Grameenphone from proceeding with its planned network expansion and offer products & services to its customers.