

Daily Market Update

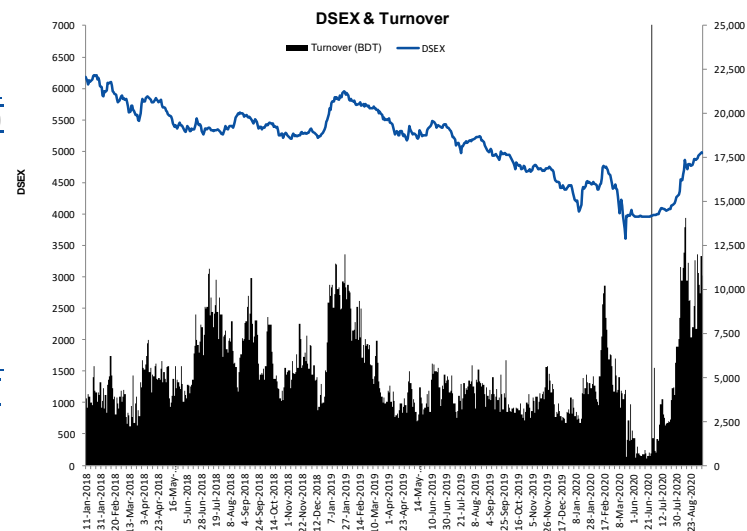
The market closed in red today. The benchmark index DSEX (-0.13%) lost 6.64 points and closed at 4,971.69 points. The blue-chip index DS30 (-0.42%), the Shariah-based index DSES (-0.33%), and the large-cap index CDSET (-0.21%) all closed in red. The large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 1.91% followed by Power (+0.49%) and Food & Allied (+0.38%). NBFIs experienced the highest loss of 0.98% followed by Engineering (-0.74%), Pharmaceuticals (-0.36%), and Banks (-0.36%). Turnover stood at BDT 10.8 billion (USD 126.9 million). Block trades contributed 5.4% of the overall market turnover. Beximco Pharmaceuticals Ltd. (-2.2%) was the most traded share with a turnover of BDT 1,047.2 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover (mn BDT)	% of Total Turnover
Banks	1,341.25	1,346.07	-4.82	-0.36%	30	546,715.1	17.01%	817.8	8.02%
NBFIs	1,858.01	1,876.36	-18.35	-0.98%	23	171,774.6	5.34%	823.1	8.08%
Mutual Funds	645.51	641.42	4.09	0.64%	37	33,546.4	1.04%	145.5	1.43%
General Insurance	2,449.60	2,337.05	112.55	4.82%	36	66,184.3	2.06%	923.3	9.06%
Life Insurance	1,930.04	1,938.84	-8.79	-0.45%	12	53,812.4	1.67%	64.9	0.64%
Telecommunication	4,817.42	4,727.18	90.24	1.91%	2	484,184.6	15.06%	248.1	2.43%
Pharmaceuticals	3,038.15	3,049.11	-10.96	-0.36%	32	572,695.1	17.82%	2,217.2	21.75%
Fuel & Power	1,738.81	1,730.25	8.56	0.49%	19	431,049.1	13.41%	596.9	5.86%
Cement	1,390.58	1,401.99	-11.41	-0.81%	7	84,569.1	2.63%	164.5	1.61%
Services & Real Estate	1,059.48	1,053.44	6.04	0.57%	8	42,299.7	1.32%	162.8	1.60%
Engineering	2,506.31	2,525.00	-18.69	-0.74%	39	162,631.2	5.06%	1,078.0	10.58%
Food & Allied	13,497.33	13,446.45	50.89	0.38%	17	249,251.5	7.75%	426.3	4.18%
IT	2,344.59	2,363.68	-19.09	-0.81%	9	25,922.3	0.81%	442.1	4.34%
Textiles	1,143.78	1,140.95	2.83	0.25%	56	115,445.1	3.59%	929.7	9.12%
Paper & Printing	6,467.73	6,568.08	-100.35	-1.53%	4	16,156.2	0.50%	139.8	1.37%
Tannery	1,764.27	1,784.76	-20.49	-1.15%	6	18,887.8	0.59%	85.0	0.83%
Jute	10,851.64	10,724.95	126.69	1.18%	3	2,398.3	0.07%	73.2	0.72%
Ceramics	445.66	446.45	-0.79	-0.18%	5	22,596.7	0.70%	126.9	1.24%
Miscellaneous	2,054.68	2,068.11	-13.43	-0.65%	13	114,007.6	3.55%	727.6	7.14%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Asia Pacific General Insurance Co. Ltd.	33.00	10.0%	76.5
Fareast Finance & Investment Limited	4.40	10.0%	1.5
Paramount Insurance	112.60	10.0%	13.9
Provati Insurance	33.50	9.8%	52.7
Agrani Insurance Co. Ltd.	30.60	9.7%	38.7
BIFC	5.70	9.6%	1.9
Shinepukur Ceramics	16.00	9.6%	22.3
Generation Next Fashions Limited	4.60	9.5%	27.7
Keya Cosmetics	5.80	9.4%	37.3
Golden Son Ltd.	8.20	9.3%	4.3

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Pragati Life Insurance	102.40	-9.9%	.7
Shaympur Sugar	69.70	-9.2%	1.9
Jute Spinners	110.00	-9.0%	2.4
Zeal Bangla Sugar Mills	163.90	-8.8%	6.9
Savar Refractories	237.70	-8.7%	2.8
Imam Buton	27.70	-7.0%	2.8
Aftab Automobiles Limited	31.20	-5.2%	10.8
Zahintex Industries Ltd	7.50	-5.1%	3.2
Matin Spinning Mills Ltd.	34.60	-4.9%	.1
Samata Leather	125.40	-4.8%	24.5

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Beximco Pharmaceuticals	122.10	-2.2%	1,047.2
Beximco Limited	26.60	-4.0%	500.6
BRAC Bank	43.30	-2.5%	377.0
Delta Brac Housing	94.20	-3.8%	300.2
Square Pharmaceuticals	211.30	-1.0%	288.0
Orion Pharma Ltd.	60.00	-2.3%	258.1
Grameenphone Ltd.	343.20	2.1%	142.4
BD Finance	18.50	2.8%	140.0
Fu Wang Food	18.50	1.6%	122.0
Summit Power	42.60	1.2%	117.4



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,971.69	4,978.33	-6.64	-0.13%	11.65%
DS30	1,726.90	1,734.23	-7.33	-0.42%	14.11%
DSES	1,146.45	1,150.20	-3.76	-0.33%	14.66%
CDSET	1,009.98	1,012.08	-2.10	-0.21%	12.25%

	Advanced	Declined	Unchanged	Total
All Category	165	147	43	355
A Category (Equity)	118	110	32	260
B Category (Equity)	27	20	7	54
N Category (Equity)	1	1	0	2
Z Category (Equity)	19	16	4	39
Mutual Funds	19	7	9	35
Corporate Bonds	0	2	0	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,763,241.9	3,756,469.5	
	Mn USD	44,294.3	44,214.6	0.2%
Turnover	Mn BDT	10,779.8	11,901.5	-9.4%
	Mn USD	126.9	140.1	
Volume	Mn Shares	367.3	400.7	-8.3%
Trade		211,967	235,793	-10.1%

Top Twenty Market Cap	Mcap (Bn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	463.4	14.4%	142.40	13.6x	10.9x
British American Tobacco Bangladesh Company Limited	194.0	6.0%	80.05	22.4x	8.0x
Square Pharmaceuticals	178.4	5.6%	288.00	13.0x	2.7x
United Power Generation & Distribution Company Ltd	147.2	4.6%	65.85	20.5x	10.0x
Renata Ltd.	105.4	3.3%	18.65	24.6x	5.8x
Investment Corporation of Bangladesh	75.3	2.3%	6.89	NM	3.6x
Berger Paints	65.6	2.0%	7.35	27.1x	9.8x
Marico Bangladesh Limited	63.0	2.0%	16.23	22.6x	42.8x
BRAC Bank	57.4	1.8%	376.97	12.7x	1.3x
LafargeHolcim Bangladesh Limited	51.0	1.6%	99.53	28.3x	3.3x
Beximco Pharmaceuticals	49.5	1.5%	1,047.22	14.5x	1.8x
Summit Power	45.5	1.4%	117.36	8.0x	1.7x
Islami Bank	39.9	1.2%	14.44	7.2x	0.7x
Dutch-Bangla Bank	36.4	1.1%	23.52	7.9x	1.2x
Olympic Industries	36.0	1.1%	9.50	17.8x	5.7x
Titas Gas	34.5	1.1%	19.34	8.9x	0.5x
Eastern Bank	29.6	0.9%	4.38	7.5x	1.1x
MJL Bangladesh Limited	27.3	0.9%	6.97	14.8x	4.3x
Glaxo Smithkline	26.8	0.8%	9.57	47.1x	21.4x
National Life Insurance Company Ltd.	25.4	0.8%	3.89	NM	23.4x

Top Twenty Free Float Mcap	Free Float Mcap (Bn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	116.7	9.0%	288.00	13.0x	2.7x
Renata Ltd.	51.5	4.0%	18.65	24.6x	5.8x
British American Tobacco Bangladesh Company Limited	51.3	4.0%	80.05	22.4x	8.0x
Grameenphone Ltd.	46.3	3.6%	142.40	13.6x	10.9x
Beximco Pharmaceuticals	43.0	3.3%	1,047.22	14.5x	1.8x
BRAC Bank	32.0	2.5%	376.97	12.7x	1.3x
Olympic Industries	26.0	2.0%	9.50	17.8x	5.7x
Islami Bank	20.4	1.6%	14.44	7.2x	0.7x
Eastern Bank	20.3	1.6%	4.38	7.5x	1.1x
Beximco Limited	18.6	1.4%	500.57	24.6x	0.4x
LafargeHolcim Bangladesh Limited	18.0	1.4%	99.53	28.3x	3.3x
Pubali Bank	16.9	1.3%	8.14	11.2x	0.8x
Summit Power	16.7	1.3%	117.36	8.0x	1.7x
City Bank	16.0	1.2%	36.93	8.5x	0.9x
National Bank	15.8	1.2%	11.09	5.0x	0.4x
United Power Generation & Distribution Company Ltd	14.7	1.1%	65.85	20.5x	10.0x
Prime Bank	12.0	0.9%	18.42	11.5x	0.7x
Beacon Pharmaceuticals Limited	12.0	0.9%	23.54	148.8x	5.8x
Southeast Bank	11.8	0.9%	14.64	5.0x	0.5x
IFIC Bank	11.4	0.9%	68.79	6.3x	0.6x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Aman Feed Limited	25.40	25.40	2.15	84,755	1
Asia Pacific General Insurance Co. Ltd.	31.50	31.50	3.15	100,000	1
Bank Asia Ltd.	17.80	17.80	178.00	10,000.00	1
Baraka Power Limited	33.00	33.00	0.83	25,000	1
British American Tobacco Bangladesh Company Limited	1,069.50	1,069.50	11.23	10,500	1
BRAC Bank	43.80	43.50	10.89	250,000	4
Beximco Pharmaceuticals	121.50	121.50	1.18	9,700	1
City Bank	22.60	22.60	11.30	500,000	1

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Daffodil Computers Ltd.	75.00	71.20	6.67	91,159	5
Eastern Insurance	98.00	98.00	6.86	70,000	1
Fine Foods Ltd	76.50	76.50	38.17	499,000	1
Fu Wang Food	17.60	17.50	1.11	63,300	2
Genex Infosys Limited	60.50	60.00	12.05	200,000	2
GQ Ball Pen	209.60	209.60	1.47	7,000	1
In Tech Online Ltd.	29.80	29.80	4.32	145,000	2
M.L. Dyeing Limited	45.80	45.00	4.16	92,200	8
Orion Pharma Ltd.	61.90	61.90	1.24	20,000	1
Renata Ltd.	1,110.00	1,110.00	32.80	29,550	1
Runner Automobiles Limited	56.00	56.00	0.84	15,000	1
Sea Pearl Beach Resort & Spa Limited	81.20	74.10	3.84	49,400	7
SK Trims & Industries Limited	62.20	56.00	38.54	674,298	43
Standard Insurance	39.00	39.00	0.50	12,830	1
Summit Power	42.60	42.60	178.92	4,200,000	1
Trust Bank	29.50	29.50	35.40	1,200,000	2
Yeakin Polymer Limited	12.60	12.60	1.26	100,000	2
Total			586.88		92

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
IFIC	IFIC Bank Ltd.	1R:5	0.0%	0.0%	31-Dec-19	10-Sep-20

Important DSE News

NATLIFEINS

Mr. Mahmudul Huq Taher, one of the Sponsors of the Company, has expressed his intention to transfer 1,50,000 shares out of his total holding of 7,88,421 shares to his wife Mrs. Rowshan Ara Begum, by way of gift outside the trading system of the Exchange within 30 working days from the date of issuance of approval letter by DSE.

EXCH

DSENEWS: Commencement of Bidding of Mir Akhter Hossain Limited through Book Building Method: The bidding period for Eligible Investors to determine the cut-off price of shares of Mir Akhter Hossain Limited through Electronic Subscription System (ESS) of the Exchanges will commence from 5:00 p.m. on September 27, 2020 and will continue till 5:00 p.m. on September 30, 2020 (round the clock) and valuation report submission period for Eligible Investors through Electronic Subscription System (ESS) of the Exchanges will start at 10:30 a.m. on October 1, 2020 and continue till 10:30 a.m. on October 5, 2020. Each EI who intends to participate in the electronic bidding shall maintain a minimum investment of Tk. 1.00 crore only in listed securities as on the end of 17th September, 2020 as per clause (c) of sub-rule (1) of rule 2 of the Bangladesh Securities and Exchange Commission (Public Issue) Rules, 2015. The minimum tick size (minimum bidding value) for bidding shall be Tk. 50 (fifty) lac which is in accordance with the BSEC consent letter to Mir Akhter Hossain Limited Ref: BSEC/CI/BB-18/2018/174 dated August 23, 2020. Participating EIs will be required to pay full bid amount (100%) and bidding fee Tk. 5,000.00 (five thousand only) through The City Bank Limited (A/C Name: Dhaka Stock Exchange Limited, A/C No.: 1121063938001) in between 10:00 a.m. of September 27, 2020 to 2:00 p.m. of September 30, 2020 (during banking hour). Please visit the following website for bidding related updates: <https://www.essbangladesh.com>.

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EBL

The Company has informed that Mr. A.M Shaukat Ali, one of the Directors of the Company passed away on 30.07.2020. His present holding is 1,66,27,684 shares. These shares will be transmitted in the account of his spouse namely Mrs. K.J.S Banu by way of nomination.