

Daily Market Update

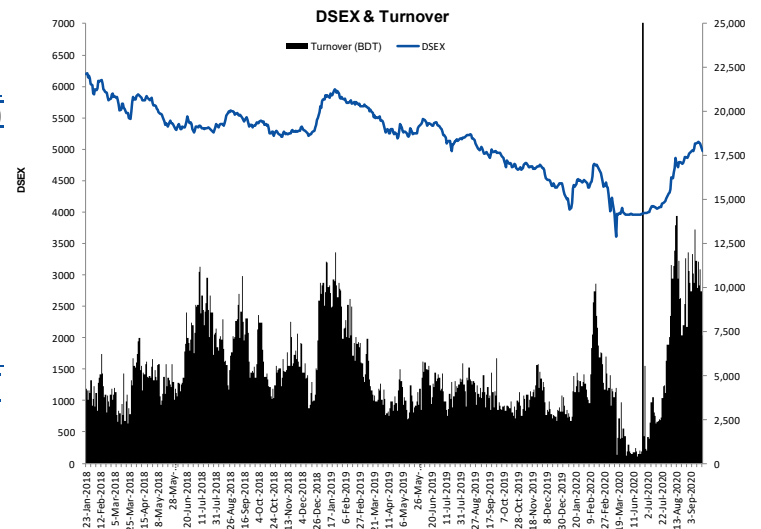
The market closed in red today. The benchmark index DSEX (-0.84%) lost 42.02 points and closed at 4,970.11. The blue-chip index DS30 (-0.73%), the Shariah-based index DSES (-1.00%), and the large-cap index CDSET (-0.65%) closed at 1,714.35, 1,126.74, and 1,007.05 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.73% followed by Food & Allied (-1.10%), Fuel & Power (-1.00%), Pharmaceutical (-0.98%), Telecommunication (-0.77%), Engineering (-0.43%), and Bank (-0.38%), respectively. Block trades contributed 5.9% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+1.4%) was the most traded share with a turnover of BDT 305 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover (mn BDT)	% of Total Turnover
Banks	1,362.50	1,367.72	-5.23	-0.38%	30	555,376.5	17.24%	543.9	7.92%
NBFIs	1,902.29	1,935.73	-33.44	-1.73%	23	176,842.2	5.49%	571.8	8.32%
Mutual Funds	691.40	703.30	-11.90	-1.69%	37	35,931.2	1.12%	370.3	5.39%
General Insurance	2,709.11	2,656.43	52.69	1.98%	36	73,195.9	2.27%	1,516.8	22.08%
Life Insurance	1,996.33	2,003.86	-7.53	-0.38%	12	55,660.6	1.73%	185.6	2.70%
Telecommunication	4,645.51	4,681.46	-35.96	-0.77%	2	466,905.8	14.49%	194.8	2.84%
Pharmaceuticals	2,977.44	3,006.95	-29.52	-0.98%	32	561,251.7	17.42%	972.7	14.16%
Fuel & Power	1,778.28	1,796.30	-18.03	-1.00%	19	440,832.9	13.68%	320.3	4.66%
Cement	1,345.97	1,346.33	-0.35	-0.03%	7	81,856.1	2.54%	121.9	1.77%
Services & Real Estate	1,050.35	1,066.35	-16.01	-1.50%	8	41,935.1	1.30%	76.2	1.11%
Engineering	2,470.84	2,481.62	-10.78	-0.43%	39	160,329.7	4.98%	607.8	8.85%
Food & Allied	14,094.61	14,252.00	-157.39	-1.10%	17	260,281.2	8.08%	221.4	3.22%
IT	2,222.88	2,266.01	-43.13	-1.90%	9	24,576.7	0.76%	129.1	1.88%
Textiles	1,135.24	1,151.49	-16.25	-1.41%	56	114,583.0	3.56%	437.3	6.37%
Paper & Printing	6,318.74	6,416.10	-97.36	-1.52%	4	15,784.0	0.49%	70.6	1.03%
Tannery	1,741.42	1,765.79	-24.37	-1.38%	6	18,643.1	0.58%	36.5	0.53%
Jute	10,794.97	10,909.47	-114.50	-1.05%	3	2,385.7	0.07%	29.1	0.42%
Ceramics	466.08	469.70	-3.62	-0.77%	5	23,631.7	0.73%	131.3	1.91%
Miscellaneous	2,005.86	2,025.41	-19.55	-0.97%	13	111,298.7	3.46%	331.4	4.83%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Shaympur Sugar	58.40	10.0%	1.5
Nitol Insurance	55.70	9.9%	128.8
Vanguard AML Rupali Bank Balanced Fund	6.50	-3.0%	4.0
Paramount Insurance	108.50	7.4%	5.0
Jute Spinners	148.50	7.2%	1.8
Salvo Chemical Industry Limited	16.40	7.2%	18.0
Federal Insurance	20.40	6.8%	93.9
First Bangladesh Fixed Income Fund	4.90	6.5%	123.7
Fine Foods Ltd	82.10	6.2%	30.9
Continental Ins Ltd.	31.10	5.8%	94.9

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
BD Welding	22.90	-9.5%	21.8
Golden Son Ltd.	8.70	-8.4%	4.9
C & A Textiles Limited	3.80	-7.3%	24.0
Familytex (BD) Limited	4.10	-6.8%	11.6
Zahintex Industries Ltd	7.30	-6.4%	3.2
Tallu Spinning	5.90	-6.3%	.9
GQ Ball Pen	204.30	-6.2%	36.2
BIFC	6.10	-6.2%	.9
Keya Cosmetics	6.40	-5.9%	28.3
R.N. Spinning Mills Limited	4.90	-5.8%	7.0

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Beximco Pharmaceuticals	116.60	1.4%	304.9
BRAC Bank	42.60	0.2%	192.8
Square Pharmaceuticals	205.60	-2.1%	189.8
Beximco Limited	24.90	-1.6%	184.2
Rupali Insurance	28.90	4.0%	149.7
Singer Bangladesh	184.10	4.7%	133.8
Nitol Insurance	55.70	9.9%	128.8
First Bangladesh Fixed Income Fund	4.90	6.5%	123.7
Purabi Gen. Insurance Company Ltd.	24.40	1.2%	122.1
BD Finance	21.90	-0.9%	119.7



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,970.11	5,012.13	-42.02	-0.84%	11.61%
DS30	1,714.35	1,726.96	-12.62	-0.73%	13.28%
DSES	1,126.74	1,138.11	-11.38	-1.00%	12.69%
CDSET	1,007.05	1,013.60	-6.55	-0.65%	11.92%

	Advanced	Declined	Unchanged	Total
All Category	75	252	29	356
A Category (Equity)	52	186	24	262
B Category (Equity)	12	41	1	54
N Category (Equity)	1	1	0	2
Z Category (Equity)	10	24	4	38
Mutual Funds	2	32	3	37
Corporate Bonds	0	2	0	2

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,769,177.0	3,795,501.0	-0.7%
	Mn USD	44,364.1	44,674.0	
Turnover	Mn BDT	7,299.2	9,775.9	-25.3%
	Mn USD	85.9	115.1	
Volume	Mn Shares	301.2	489.0	-38.4%
Trade		164,977	210,880	-21.8%

Top Twenty Market Cap	Mcap (Bn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	444.9	13.8%	88.47	13.1x	10.5x
British American Tobacco Bangladesh Company Limited	205.2	6.4%	109.96	23.7x	8.4x
Square Pharmaceuticals	173.6	5.4%	189.77	12.6x	2.6x
United Power Generation & Distribution Company Ltd	159.6	5.0%	52.30	22.2x	10.8x
Renata Ltd.	103.7	3.2%	15.54	24.2x	5.7x
Investment Corporation of Bangladesh	75.9	2.4%	5.82	NM	3.6x
Berger Paints	65.0	2.0%	11.72	26.8x	9.7x
Marico Bangladesh Limited	63.0	2.0%	5.60	22.6x	42.8x
BRAC Bank	56.5	1.8%	192.78	12.5x	1.3x
LafargeHolcim Bangladesh Limited	48.8	1.5%	71.33	27.1x	3.2x
Beximco Pharmaceuticals	47.3	1.5%	304.89	13.8x	1.7x
Summit Power	44.9	1.4%	15.95	7.9x	1.7x
Islami Bank	41.7	1.3%	8.58	7.6x	0.7x
Olympic Industries	36.5	1.1%	10.82	18.0x	5.8x
Dutch-Bangla Bank	36.0	1.1%	12.62	7.8x	1.2x
Titas Gas	33.6	1.0%	18.25	8.6x	0.5x
Eastern Bank	30.0	0.9%	5.04	7.6x	1.1x
MJL Bangladesh Limited	28.7	0.9%	6.28	15.6x	4.5x
Glaxo Smithkline	27.3	0.8%	2.82	48.0x	21.8x
National Life Insurance Company Ltd.	25.5	0.8%	8.88	NM	23.5x

Top Twenty Free Float Mcap	Free Float Mcap (Bn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	113.6	8.8%	189.77	12.6x	2.6x
British American Tobacco Bangladesh Company Limited	54.3	4.2%	109.96	23.7x	8.4x
Renata Ltd.	50.6	3.9%	15.54	24.2x	5.7x
Grameenphone Ltd.	44.5	3.4%	88.47	13.1x	10.5x
Beximco Pharmaceuticals	41.1	3.2%	304.89	13.8x	1.7x
BRAC Bank	31.5	2.4%	192.78	12.5x	1.3x
Olympic Industries	26.3	2.0%	10.82	18.0x	5.8x
Islami Bank	21.3	1.6%	8.58	7.6x	0.7x
Eastern Bank	20.6	1.6%	5.04	7.6x	1.1x
City Bank	18.2	1.4%	72.48	9.6x	1.0x
Beximco Limited	17.4	1.3%	184.18	23.1x	0.4x
Pubali Bank	17.3	1.3%	2.86	11.4x	0.9x
LafargeHolcim Bangladesh Limited	17.2	1.3%	71.33	27.1x	3.2x
Summit Power	16.5	1.3%	15.95	7.9x	1.7x
United Power Generation & Distribution Company Ltd	16.0	1.2%	52.30	22.2x	10.8x
National Bank	15.8	1.2%	17.06	5.0x	0.4x
Prime Bank	12.1	0.9%	9.17	11.5x	0.7x
IFIC Bank	11.7	0.9%	43.54	6.4x	0.6x
Southeast Bank	11.7	0.9%	11.64	5.0x	0.5x
Beacon Pharmaceuticals Limited	11.3	0.9%	27.13	140.7x	5.5x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Baraka Power Limited	30.10	30.10	15.05	500,000	1
BD Finance	22.00	22.00	1.13	51,500	1
BRAC Bank	42.60	41.90	17.80	423,000	24
Bangladesh Shipping Corporation	49.00	49.00	0.53	10,900	1
Beximco Pharmaceuticals	117.30	117.30	99.71	850,000	1
City Bank	24.80	24.80	24.80	1,000,000	1
Fine Foods Ltd	76.10	76.00	46.39	610,000	5
Grameenphone Ltd.	328.80	328.00	11.53	35,081	2

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Lankabangla Finance	22.40	22.40	2.59	115,488	1
Meghna Life Insurance	62.40	62.40	12.48	200,000	2
National Life Insurance Company Ltd.	236.00	236.00	15.40	65,263	1
Nitol Insurance	53.00	53.00	2.65	50,000	1
Northern Islami Insurance Limited	29.90	29.90	0.60	20,000	1
Orion Pharma Ltd.	62.00	60.30	8.79	142,600	2
Pioneer Insurance	63.50	63.00	2.54	40,000	2
Popular Life Insurance	76.70	76.70	38.35	500,000	1
Paramount Textile Limited	53.50	53.50	5.35	100,000	1
Republic Insurance	41.20	41.20	4.29	104,000	1
Sea Pearl Beach Resort & Spa Limited	79.10	74.80	12.13	155,499	7
SK Trims & Industries Limited	60.00	59.10	3.56	60,000	5
Square Pharmaceuticals	206.30	206.20	103.10	500,000	2
Summit Power	42.30	42.30	1.21	28,500	1
Total			429.96		64

Important DSE News

APEXFOOT

The Board of Directors has recommended 25% cash dividend for the year ended on June 30, 2020. The Board of Directors has also recommended to amend/ inclusion/deletion the Articles of Association of the Company subject to approval by the shareholders at the Extra Ordinary General Meeting. Date of EGM and AGM: 12.11.2020, Time of EGM and AGM: 11:00 AM and 11:15 AM, Venue: Digital Platform. Record Date for EGM & AGM: 12.10.2020. The Company has also reported EPS of Tk. 5.62, NAV per share of Tk. 249.95 and NOCFPS of Tk. 144.14 for the year ended on June 30, 2020 as against Tk. 10.91, Tk. 249.83 and Tk. 86.29 respectively for the same period of the previous year.

REGL

BSEC News: As per BSEC Directive No. BSEC/Surveillance/2020 -975/128 dated 21 September 2020, the TREC holders of the stock exchanges may now extend maximum limit of credit facilities to their approved clients in the following manner under the Margin Rules, 1999 until further order: DSEX Index Below - 4000 maximum margin loan limit 1:1 Basis i.e., equal of clients margin/deposit; DSE X Index 4001 to 5000 - maximum margin loan limit 1:0.75 Basis i.e., 75% of clients margin/deposit; DSEX Index 5001 to 6000 - maximum margin loan limit 1:0.50 Basis i.e., 50% of clients margin/deposit; DSEX Index 6001 and above - maximum margin loan limit 1:0.25 Basis i.e., 25% of clients margin/deposit. The Directive shall have effect from October 01, 2020.

CNW

Walton Hi-Tech Industries Limited: (Q3): As per un-audited Q3 financial statements, profit after tax was Tk. 1,552.12 million and basic EPS of Tk. 5.17 for the 3 (three) months (January-March 2020) period ended on 31 March 2020 against profit after tax of Tk. 3,343.01 million and basic EPS of Tk. 11.14 for the same period of the previous year. However, Post-IPO basic EPS for the 3 (three) months (January-March 2020) period ended on 31 March 2020 would be Tk. 5.12. Moreover, profit after tax was Tk. 7,660.13 million and basic EPS of Tk. 25.53 for the 9 (nine) months (July 2019-March 2020) period ended on 31 March 2020 against profit after tax of Tk. 7,266.11 million and basic EPS of Tk. 24.22 for the same period of the previous year. However, Post-IPO EPS would be Tk. 25.29 for 9 (nine) months (July 2019-March 2020) period ended on 31 March 2020. Pre-IPO Net Asset Value (NAV) per share (considering Pre-IPO paid up shares)

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would be Tk. 266.38 as on 31 march 2020 and the same would be Tk. 267.01 (considering Post-IPO paid up shares). Pre-IPO paid-up number of shares for 3 (three) months (January-March 2020) and 9 (nine) months (July 2019-March 2020) period ended on 31 march 2020 was 300,000,000 which was same for the same period of the previous year and Post-IPO paid-up number of shares would be 302,928,343.

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(Q3 Un-audited): EPU was Tk. (0.4443) for October-December 2019 as against Tk. 0.1662 for October-December 2018; EPU was Tk. (0.8566) for April-December 2019 as against Tk. 0.5914 for April-December 2018. NOCFPU was Tk. 0.79 for April-December 2019 as against Tk. (0.45) for April-December 2018. NAV per unit at market price was Tk. 9.33 as on December 31, 2019 and Tk. 11.71 as on March 31, 2019. NAV per unit at cost price was Tk. 9.45 as on December 31, 2019 and Tk. 10.98 as on March 31, 2019.

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(Q1 Un-audited): EPU was Tk. (0.7669) for October-December 2019 as against Tk. 0.0845 for October-December 2018. NOCFPU was Tk. 0.22 for October-December 2019 as against Tk. 0.11 for October-December 2018. NAV per unit at market price was Tk. 9.30 as on December 31, 2019 and Tk. 10.59 as on September 30, 2019. NAV per unit at cost price was Tk. 9.73 as on December 31, 2019 and Tk. 10.47 as on September 30, 2019.

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BSEC News: Referring to the earlier news disseminated on 08.09.2020 regarding Suspension of trading of the shares of BXSYNTH as per BSEC Directive, the trading of the shares has been further suspended for 15 days effective from September 23, 2020 as per BSEC Directive No. BSEC/SRMIC/174-2020/52 dated September 07, 2020 under Section 9(7) of the Securities and Exchange Ordinance, 1969 (Ordinance No. XVII of 1969) subject to the compliance of Section 9(8) of this Ordinance.

ONEBANKLTD

The Company has informed that it has credited the Bonus shares for the year ended on December 31, 2019 to the respective shareholders' BO Accounts on September 16, 2020. Cash dividend and proceeds of fractional dividend have also been disbursed to the General Shareholders through BEFTN System. The Company also informed that payment cash dividend against Directors, Sponsors and Institution will be done after September 30, 2020 as per Bangladesh Bank DOS Circular Letter No. 19, on June 07, 2020.