

## Daily Market Update

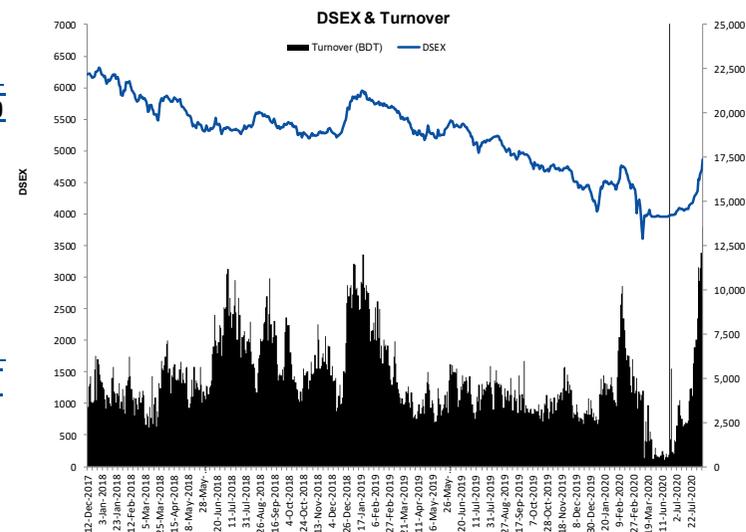
The market closed in green today. The benchmark index DSEX (+3.32%) gained 156.17 points and closed at 4,859.49. The blue-chip index DS30 (+2.86%), the Shariah-based index DSES (+1.97%), and the large cap index CDSET (+3.08%) closed at 1,639.90, 1,109.88, and 967.93 points respectively. All the large cap sectors posted positive performance today. NBFi booked the highest gain of 5.87% followed by Bank (+5.81%), Fuel & Power (+3.90%), Pharmaceutical (+1.30%), Telecommunication (+0.86%), Engineering (+0.68%), and Food & Allied (+0.42%). Block trades contributed 5.3% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+8.7%) was the most traded share with a turnover of BDT 806 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,385.38	1,309.32	76.06	5.81%	30	564,704.7	18.29%	1,824.5	14.26%
NBFIs	1,762.62	1,664.89	97.73	5.87%	23	162,955.7	5.28%	362.8	2.83%
Mutual Funds	662.18	611.45	50.73	8.30%	37	34,412.4	1.11%	392.4	3.07%
General Insurance	2,581.87	2,492.72	89.15	3.58%	35	69,758.0	2.26%	1,627.8	12.72%
Life Insurance	2,130.44	2,131.57	-1.13	-0.05%	12	59,399.8	1.92%	245.8	1.92%
Telecommunication	4,142.92	4,107.77	35.14	0.86%	2	416,392.1	13.49%	326.2	2.55%
Pharmaceuticals	2,928.35	2,890.88	37.47	1.30%	32	551,999.1	17.88%	2,165.8	16.92%
Fuel & Power	1,675.35	1,612.51	62.85	3.90%	19	415,318.5	13.45%	1,059.4	8.28%
Cement	1,355.74	1,335.87	19.88	1.49%	7	82,450.3	2.67%	305.8	2.39%
Services & Real Estate	1,035.77	1,019.23	16.54	1.62%	8	41,353.3	1.34%	121.1	0.95%
Engineering	2,381.72	2,365.67	16.05	0.68%	39	154,546.7	5.01%	1,227.4	9.59%
Food & Allied	12,499.41	12,447.43	51.97	0.42%	17	230,823.0	7.48%	582.1	4.55%
IT	2,050.50	2,015.39	35.11	1.74%	9	22,670.8	0.73%	190.7	1.49%
Textiles	1,119.45	1,064.47	54.98	5.17%	56	112,989.4	3.66%	991.8	7.75%
Paper & Printing	6,223.65	6,147.78	75.87	1.23%	4	15,546.5	0.50%	163.7	1.28%
Tannery	1,742.35	1,711.04	31.31	1.83%	6	18,653.1	0.60%	99.9	0.78%
Jute	9,299.72	9,382.96	-83.23	-0.89%	3	2,055.3	0.07%	41.2	0.32%
Ceramics	453.98	436.56	17.43	3.99%	5	23,018.6	0.75%	122.8	0.96%
Miscellaneous	1,941.83	1,890.17	51.66	2.73%	13	107,746.1	3.49%	946.6	7.40%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Sunlife Insurance Company Limited	20.40	14.6%	4.8
PHP First Mutual Fund	4.90	14.0%	11.7
AB Bank 1st Mutual Fund	4.80	11.6%	9.7
R.N. Spinning Mills Limited	4.40	10.0%	13.4
Fareast Finance & Investment Limited	3.30	10.0%	.1
Heidelberg Cement	156.30	10.0%	2.1
SEML FBLSL Growth Fund	9.90	10.0%	15.9
Shaympur Sugar	51.80	10.0%	1.1
Orion Pharma Ltd.	49.50	10.0%	142.2
BRAC Bank	38.60	10.0%	365.8

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Eastern Cables	146.30	-3.5%	17.5
National Tea	484.80	-3.4%	3.0
Fu Wang Food	17.30	-3.4%	134.2
IFAD Autos Limited	46.30	-2.7%	45.7
Nitol Insurance	43.50	-2.5%	96.0
Rupali Life Insurance Co. Ltd.	55.50	-2.5%	67.3
Sonali Aansh	361.60	-2.4%	7.3
National Life Insurance Company Ltd.	253.70	-2.3%	38.0
Navana CNG Limited	40.50	-1.9%	5.7
Dhaka Insurance Limited	44.20	-1.6%	41.9

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Beximco Pharmaceuticals	105.50	8.7%	806.4
Beximco Limited	21.50	0.9%	451.1
BRAC Bank	38.60	10.0%	365.8
Square Pharmaceuticals	203.60	0.5%	286.9
Sonar Bangla Ins	50.80	10.0%	195.6
Summit Power	42.60	4.2%	190.3
Nahee Aluminium Composite Panel Ltd.	63.20	1.1%	181.7
SK Trims & Industries Limited	65.10	2.5%	174.6
Bangladesh Submarine Cable Company Limited	136.50	5.8%	172.8
Republic Insurance	36.10	6.2%	167.7



Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,859.49	4,703.32	156.17	3.32%	9.13%
DS30	1,639.90	1,594.31	45.59	2.86%	8.36%
DSES	1,109.88	1,088.46	21.42	1.97%	11.01%
CDSET	967.93	939.01	28.92	3.08%	7.58%

	Advanced	Declined	Unchanged	Total
All Category	301	42	11	354
A Category (Equity)	210	37	8	255
B Category (Equity)	39	5	3	47
N Category (Equity)	1	0	0	1
Z Category (Equity)	51	0	0	51
Mutual Funds	37	0	0	37
Corporate Bonds	2	0	0	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,635,204.2	3,550,876.5	
	Mn USD	42,787.2	41,794.7	2.4%
Turnover	Mn BDT	13,513.3	12,077.8	
	Mn USD	159.1	142.2	11.9%
Volume	Mn Shares	514.4	466.9	10.2%
		230,966	218,897	5.5%

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Top Twenty Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	393.9	12.8%	153.46	11.6x	9.3x
British American Tobacco Bangladesh Company Limited	173.5	5.6%	152.08	20.0x	7.1x
Square Pharmaceuticals	171.9	5.6%	286.88	12.5x	2.6x
United Power Generation & Distribution Company Ltd	138.7	4.5%	100.72	19.3x	9.4x
Renata Ltd.	102.8	3.3%	40.29	24.0x	5.7x
Investment Corporation of Bangladesh	74.4	2.4%	31.99	NM	3.6x
Berger Paints	64.8	2.1%	34.52	26.8x	9.7x
Marico Bangladesh Limited	57.6	1.9%	.00	20.6x	39.1x
BRAC Bank	51.2	1.7%	365.79	11.3x	1.1x
LafargeHolcim Bangladesh Limited	47.6	1.5%	145.25	26.5x	3.1x
Summit Power	45.5	1.5%	190.28	8.0x	1.7x
Beximco Pharmaceuticals	42.8	1.4%	806.36	12.5x	1.5x
Islami Bank	42.0	1.4%	57.27	7.6x	0.7x
Olympic Industries	39.3	1.3%	17.28	19.5x	6.2x
Dutch-Bangla Bank	36.6	1.2%	36.23	7.9x	1.2x
Titas Gas	32.5	1.1%	40.22	8.4x	0.5x
Eastern Bank	31.0	1.0%	19.46	7.8x	1.2x
Glaxo Smithkline	28.9	0.9%	7.73	50.7x	23.0x
National Life Insurance Company Ltd.	27.5	0.9%	37.97	NM	25.4x
MJL Bangladesh Limited	26.1	0.8%	17.98	14.2x	4.1x

Top Twenty Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	112.5	8.9%	286.88	12.5x	2.6x
Renata Ltd.	50.2	4.0%	40.29	24.0x	5.7x
British American Tobacco Bangladesh Company Limited	45.9	3.6%	152.08	20.0x	7.1x
Grameenphone Ltd.	39.4	3.1%	153.46	11.6x	9.3x
Beximco Pharmaceuticals	37.1	2.9%	806.36	12.5x	1.5x
BRAC Bank	28.5	2.3%	365.79	11.3x	1.1x
Olympic Industries	28.4	2.2%	17.28	19.5x	6.2x
Islami Bank	21.5	1.7%	57.27	7.6x	0.7x
Eastern Bank	21.2	1.7%	19.46	7.8x	1.2x
National Bank	17.5	1.4%	69.20	5.5x	0.5x
Pubali Bank	17.4	1.4%	2.63	11.3x	0.8x
LafargeHolcim Bangladesh Limited	16.8	1.3%	145.25	26.5x	3.1x
Summit Power	16.7	1.3%	190.28	8.0x	1.7x
City Bank	16.3	1.3%	162.46	8.6x	0.9x
Beximco Limited	15.0	1.2%	451.07	19.9x	0.3x
Beacon Pharmaceuticals Limited	13.9	1.1%	78.29	173.3x	6.8x
United Power Generation & Distribution Company Ltd	13.9	1.1%	100.72	19.3x	9.4x
Shahjalal Islami Bank	12.7	1.0%	13.52	12.5x	1.2x
Southeast Bank	12.3	1.0%	163.08	5.2x	0.5x
Prime Bank	12.2	1.0%	16.40	11.6x	0.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Agni Systems Ltd.	18.00	18.00	0.52	29,000	1
BD Welding	29.40	29.40	0.59	20,000	1
BRAC Bank	31.90	31.90	0.80	25,000	1
Beximco Pharmaceuticals	103.50	97.10	236.17	2,411,000	11
Central Pharmaceuticals Limited	15.70	15.70	15.55	990,500	3
City Bank	18.40	18.40	38.64	2,100,000	3
Coppertech Industries Limited	25.60	25.60	1.02	40,000	1
Desh Garments	150.00	150.00	3.75	25,000	1

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Dulamia Cotton	71.00	68.00	2.70	38,729	3
Eastland Insurance	31.20	31.20	2.56	82,000	1
Fine Foods Ltd	57.10	57.00	19.85	348,184	6
First Security Bank	9.00	9.00	0.90	100,000	1
Fu Wang Food	18.00	18.00	9.00	500,000	1
Genex Infosys Limited	63.00	59.40	78.80	1,325,000	2
GQ Ball Pen	150.00	149.90	2.25	15,000	2
IFIC Bank	10.00	10.00	45.00	4,500,000	2
Jamuna Oil	169.20	169.20	33.84	200,000	1
Kay and Que	215.00	215.00	1.01	4,674	1
Legacy Footwear	69.00	68.00	4.31	63,000	4
LafargeHolcim Bangladesh Limited	37.80	37.80	26.42	699,000	2
M.L. Dyeing Limited	51.10	51.10	25.55	500,000	3
Orion Pharma Ltd.	47.00	47.00	2.35	50,000	1
Pacific Denims Limited	10.00	10.00	0.90	90,000	1
Phoenix Finance	23.00	23.00	1.21	52,626	1
Progressive Life Ins	135.00	135.00	1.00	7,400	1
RAK Ceramics Limited	30.00	30.00	0.64	21,400	1
Renata Ltd.	1,163.00	1,155.00	11.59	10,000	2
S. Alam Cold Rolled Steels	23.00	23.00	1.22	52,997	1
Sea Pearl Beach Resort & Spa Limited	79.10	71.20	31.79	416,201	27
SK Trims & Industries Limited	67.90	67.00	1.97	29,200	2
Sonar Bangla Ins	50.80	50.70	10.15	200,000	4
Southeast Bank	12.80	12.80	32.00	2,500,000	1
Square Pharmaceuticals	204.00	202.00	8.54	42,000	6
S. S. Steel Limited	14.50	14.50	1.02	70,000	1
Standard Bank	8.80	8.80	1.32	150,000	2
United Power Generation & Distribution Company Ltd	250.00	248.00	51.42	207,000	9
Yeakin Polymer Limited	12.30	10.10	8.73	786,851	2
<b>Total</b>			<b>715.06</b>		<b>113</b>

### Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
PURABIGEN	Purabi Gen. Insurance Company Ltd.		0.0%	10.0%	31-Dec-19	17-Aug-20
NHFIL	National Housing Finance and Investments Limited		0.0%	10.0%	31-Dec-19	18-Aug-20
STANDARINS	Standard Insurance Ltd.		0.0%	10.0%	31-Dec-19	20-Aug-20
ESQUIRENIT	Esquire Knit Composite Limited		0.0%	0.0%	31-Dec-19	20-Aug-20
UNIONCAP	Union Capital Ltd.		0.0%	0.0%	31-Dec-19	24-Aug-20
PRAGATIINS	Pragati Insurance Company limited		0.0%	22.0%	31-Dec-19	24-Aug-20
DHAKAINS	Dhaka Insurance Limited		0.0%	15.0%	31-Dec-19	24-Aug-20
PADMALIFE	Padma Islami Life Insurance Limited		0.0%	0.0%	31-Dec-19	24-Aug-20

### Important DSE News

#### REGL

BSEC News: As per Compliance of BSEC Notification No. BSEC/CMRRC/2009-193/217/

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Admin/90 dated 21.05.2019, the Company and its Board of directors are directed to comply jointly minimum 30 % share of the paid-up capital of the Company within 60 working days from July 29, 2020, otherwise failure of which, Commission will take necessary measures as per securities laws. For the purpose of compliance of the said Notification, all existing sponsors, directors and proposed directors are exempted from the Sub-Rule (2) of Rule 4 of Securities and Exchange Commission (Prohibition of Insider Trading) Rules, 1995 to acquire minimum 30% share of the paid-up capital of the company for the same period in the applicable cases.

#### **GRAMEENS2**

The Trustee Committee of the Fund has decided to distribute 7% cash dividend taking into consideration available fund for distribution of profit for the year ended 30th June 2020. Record date: 06.09.2020. The Fund has reported EPU of Tk. 0.74, NAV per unit at market price of Tk. 15.46, NAV per unit at cost of Tk. 11.14 and NOCFPU of Tk. 0.85 for the year ended on June 30, 2020 as against Tk. 1.12, Tk. 19.72, Tk. 11.28 and Tk. 1.13 respectively for the same period of the previous year.

#### **SUNLIFEINS**

The Board of Directors has recommended No Dividend for the year ended on December 31, 2019. The Board has also decided to held an EGM for sale of Company's Land located at 15, Mohakhali, Dhaka. Date of EGM and AGM: 29.09.2020, Time of EGM and AGM: 10:00 AM and 10:15 AM respectively, Venue: Digital Platform. Record Date for EGM and AGM: 06.09.2020.

#### **PRAGATILIF**

The Company has informed that BSEC has accorded approval for raising paid up capital through issuance of 15,351,551 Ordinary shares of Tk. 10.00 each issuing at Tk. 15.00 each including premium of Tk. 5.00 per share totaling Tk. 230,273,265.00 at a ratio of 1R:1, i.e. one Rights Share for one existing shares. The purposes of issuance of Right shares are to cope with the business growth and strengthen the capital base of the company as well as fulfill the regulatory requirement. The Record Date for entitlement of rights share, the period of subscription and the list of Banker to the issue will be notified within 3 working days as per the Securities and Exchange Commission (Right Issue) Rules, 2006.

#### **ACI**

The Company has informed that the Board of Directors has approved a foreign investment of Tk. 1,260,000,360.00 (One Billion Two Hundred Sixty Million Three Hundred and sixty only) for 2,333,334 Convertible Non-cumulative Preference Shares of Tk. 100.00 each at a premium of Tk. 440.00 in the share capital of ACI Motors Limited, one of its Subsidiaries and approved the draft Shareholders' Agreement and Share Subscription Agreement for execution. The said shares will be issued to Bangladesh Managed Account C.V, a limited partnership of FMO (NETHERLANDSE FINANCIERINGS-MAATSCHAPPIJ VOOR ONTWIKKELINGSLANDEN N.V.), a limited company incorporated under the Laws of the Netherlands and SDI Pte. Limited, a company established under the laws of Singapore. The proceeds will be used for business growth and expansion of existing manufacturing facilities of ACI Motors. This arrangement will reduce the Company's shareholding in ACI Motors Limited from 65.00% to 52.70%.

#### **BGIC**

(Q1 Un-audited): EPS was Tk. 0.40 for January-March 2020 as against Tk. 0.73 for January-March 2019. NOCFPS was Tk. 1.55 for January-March 2020 as against Tk. 1.43 for January-March 2019. NAV per share was Tk. 18.83 as on March 31, 2020 and Tk. 20.40 as on March 31, 2019.

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(Q2 Un-audited): EPS was Tk. 0.52 for April-June 2020 as against Tk. 0.24 for April-June 2019; EPS was Tk. 0.92 for January-June 2020 as against Tk. 0.99 for January-June 2019. NOCFPS was Tk. 2.36 for January-June 2020 as against Tk. 1.39 for January-June 2019. NAV per share was Tk. 19.23 as on June 30, 2020 and Tk. 25.99 as on June 30, 2019.

#### **POPULAR1MF**

The Trustee Committee of the Fund has declared No dividend for the year ended on June 30, 2020. The Fund has reported EPU of Tk. (1.23), NAV per unit at market price of Tk. 9.38, NAV per unit at cost of Tk. 11.17 and NOCFPU of Tk. 0.34 for the year ended on June 30, 2020 as against Tk. 0.31, Tk. 10.90, Tk. 11.16 and Tk. 0.15 respectively for the same period of the previous year.

#### **EBLNRBMF**

The Trustee Committee of the Fund has declared No dividend for the year ended on June 30, 2020. The Fund has reported EPU of Tk. (1.35), NAV per unit at market price of Tk. 9.19, NAV per unit at cost of Tk. 10.77 and NOCFPU of Tk. 0.13 for the year ended on June 30, 2020 as against Tk. 0.31, Tk. 10.83, Tk. 10.96 and Tk. 0.40 respectively for the same period of the previous year.

#### **PHPMF1**

The Trustee Committee of the Fund has declared No dividend for the year ended on June 30, 2020. The Fund has reported EPU of Tk. (1.23), NAV per unit at market price of Tk. 9.23, NAV per unit at cost of Tk. 10.86 and NOCFPU of Tk. 0.18 for the year ended on June 30, 2020 as against Tk. 0.29, Tk. 10.75, Tk. 10.99 and Tk. 0.25 respectively for the same period of the previous year.

#### **ABB1STMF**

The Trustee Committee of the Fund has declared No dividend for the year ended on June 30, 2020. The Fund has reported EPU of Tk. (1.80), NAV per unit at market price of Tk. 9.10, NAV per unit at cost of Tk. 11.50 and NOCFPU of Tk. 0.41 for the year ended on June 30, 2020 as against Tk. 0.23, Tk. 11.19, Tk. 11.41 and Tk. 0.41 respectively for the same period of the previous year.

#### **ATCSLGF**

The Trustee Committee of the Fund has declared No dividend for the year ended on June 30, 2020. The Fund has also reported EPU of Tk. (1.69), NAV per unit at market price of Tk. 10.06, NAV per unit at cost of Tk. 10.97 and NOCFPU of Tk. (0.66) for the year ended on June 30, 2020 as against Tk. 1.01, Tk. 12.95, Tk. 12.49 and Tk. 1.00 respectively for the same period of the previous year.

#### **ASIAINS**

Bay Leasing & Investment Limited., one of the Corporate Directors of the Company, has expressed its intention to buy 8,00,000 shares of the company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

#### **SUNLIFEINS**

(Q1 Un-audited): Decrease in life revenue account for Jan-Mar 2020 was Tk. 53.20 million with total life insurance fund of Tk. 1,868.25 million as against decrease in life revenue account of Tk.

50.55 million and Tk. 2,358.05 million respectively for the same period of the previous year.

(Q2 Un-audited): Decrease in life revenue account for Jan-June 2020 was Tk. 108.22 m. with total life insurance fund of Tk. 1,813.24 m. as against decrease in Tk. 81.45 m. and Tk. 2,327.16 m. respectively for the same period of the previous year.