

Daily Market Update

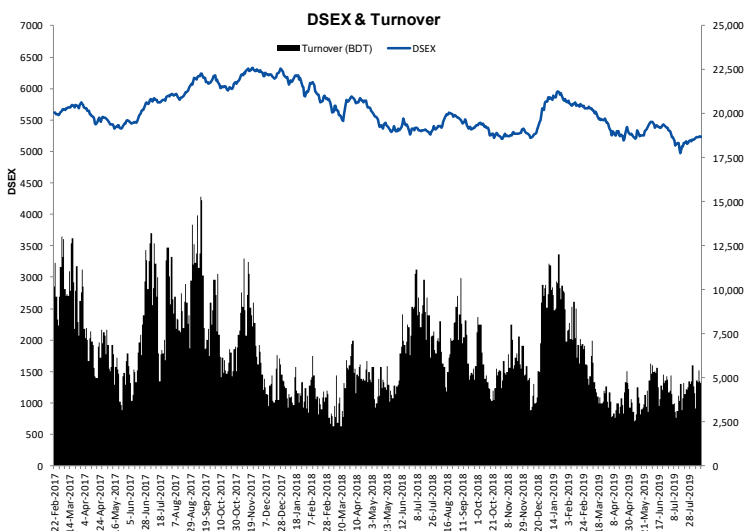
Market closed in red today. The benchmark index DSEX (-0.25%) lost 13.12 points and closed at 5,223.73 points today. The blue chip index DS30 (-0.45%) and the shariah based index DSES (-0.26%) both closed in red. Large cap sectors showed negative performance today except NBFIs (+0.05%). Food & Allied (-0.88%) experienced the highest loss of 0.88% followed by Telecommunication (-0.75%), Power (-0.59%), Banks (-0.21%), Pharmaceuticals (-0.20%) and Engineering (-0.04%). Turnover stood at BDT 4.7 billion (USD 56.4 million). United Power Generation & Distribution Company Ltd (-1.0%) was the most traded share with a turnover of BDT 178.6 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,421.29	1,424.28	-2.99	-0.21%	30	580,110.1	17.54%	193.4	4.15%
NBFIs	1,806.61	1,805.78	0.84	0.05%	23	167,018.6	5.05%	123.6	2.65%
Mutual Funds	658.09	672.81	-14.71	-2.19%	37	34,198.8	1.03%	118.0	2.53%
General Insurance	1,910.74	1,922.75	-12.02	-0.62%	35	51,756.4	1.56%	303.7	6.52%
Life Insurance	2,144.98	2,185.05	-40.07	-1.83%	12	59,805.1	1.81%	78.8	1.69%
Telecommunication	4,459.79	4,493.67	-33.87	-0.75%	2	448,239.8	13.55%	58.5	1.26%
Pharmaceuticals	2,829.04	2,834.70	-5.66	-0.20%	32	533,568.3	16.13%	910.6	19.56%
Fuel & Power	1,987.90	1,999.79	-11.89	-0.59%	20	492,798.8	14.90%	405.1	8.70%
Cement	1,423.93	1,441.02	-17.10	-1.19%	7	86,595.5	2.62%	61.8	1.33%
Services & Real Estate	1,043.78	1,033.43	10.35	1.00%	8	40,895.6	1.24%	135.3	2.91%
Engineering	3,057.29	3,058.56	-1.27	-0.04%	39	199,117.0	6.02%	741.7	15.93%
Food & Allied	15,091.58	15,226.06	-134.48	-0.88%	17	277,742.2	8.40%	117.1	2.52%
IT	1,896.36	1,865.06	31.29	1.68%	9	20,966.5	0.63%	89.7	1.93%
Textiles	1,339.23	1,350.65	-11.42	-0.85%	55	129,882.2	3.93%	598.6	12.86%
Paper & Printing	7,154.02	7,159.71	-5.69	-0.08%	3	13,677.8	0.41%	37.4	0.80%
Tannery	2,376.33	2,397.51	-21.17	-0.88%	6	25,589.1	0.77%	161.0	3.46%
Jute	17,577.03	17,416.21	160.82	0.92%	3	3,884.6	0.12%	7.3	0.16%
Ceramics	535.74	552.20	-16.46	-2.98%	5	25,875.7	0.78%	167.9	3.61%
Miscellaneous	2,093.36	2,099.18	-5.82	-0.28%	13	116,153.7	3.51%	346.2	7.44%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
United Airways (BD) Ltd.	2.20	10.0%	8.0
KDS Accessories Limited	63.90	10.0%	125.3
Meghna Pet Industries	11.90	9.2%	.3
Hakkani Pulp & Paper	64.00	9.0%	23.8
City General Insurance	22.20	8.8%	51.9
Silco Pharmaceuticals Limited	33.70	8.0%	159.6
Kay and Que	196.20	7.5%	17.3
Anwar Galvanizing Ltd.	91.50	6.1%	76.2
Standard Ceramic	393.40	6.1%	43.6
Global Heavy Chemicals Limited	40.60	5.7%	1.2

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
SEML IBBL Shariah Fund	9.10	-9.9%	9.0
SEML FBLSL Growth Fund	20.40	-9.7%	4.1
Progressive Life Ins	80.50	-9.2%	1.7
Tung Hai Knitting & Dyeing Limited	3.50	-7.9%	.5
SEML Lecture Equity Management Fund	7.10	-7.8%	10.3
C & A Textiles Limited	2.80	-6.7%	1.7
VFS Thread Dyeing Limited	33.70	-6.4%	74.4
Vanguard AML Rupali Bank Balanced Fund	6.00	-6.3%	3.9
NCCBL Mutual Fund - 1	6.10	-6.2%	1.2
Monno Jute Staffers	1,335.50	-5.9%	85.3

Most Traded Share	Close	Δ%	Turnover (mn BDT)
United Power Generation & Distribution Company Ltd	406.70	-1.0%	178.6
Orion Infusion	71.00	0.0%	165.9
Silco Pharmaceuticals Limited	33.70	8.0%	159.6
Beacon Pharmaceuticals Limited	25.10	2.0%	130.9
KDS Accessories Limited	63.90	10.0%	125.3
Fortune Shoes Limited	40.00	-3.4%	122.5
Bangladesh Shipping Corporation	56.40	1.8%	122.4
Monno Ceramic	206.60	-4.2%	106.1
JMI Syringes & Medical Devices Ltd	482.00	-2.8%	97.1
Beximco Limited	21.30	0.5%	85.4



Associate:
Md. Rafiqul Islam
 (880)1708805229
 mrafiqulislam@bracepl.com

Associate:
Md. Mahirul Quddus
 (880)1709636546
 mmahirul.quddus@bracepl.com

Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	5,223.73	5,236.85	-13.12	-0.25%	-3.01%
DS30	1,841.77	1,850.01	-8.25	-0.45%	-2.07%
DSES	1,203.73	1,206.85	-3.11	-0.26%	-2.36%

	Advanced	Declined	Unchanged	Total
All Category	105	214	35	354
A Category (Equity)	70	170	25	265
B Category (Equity)	14	24	2	40
N Category (Equity)	4	5	0	9
Z Category (Equity)	17	15	8	40
Mutual Funds	2	28	7	37
Corporate Bonds	1	0	0	1

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,868,191.8	3,884,402.6	-0.4%
	Mn USD	46,531.8	46,726.8	
Turnover	Mn BDT	4,689.9	4,789.1	-2.1%
	Mn USD	56.4	57.6	
Volume	Mn Shares	149.1	165.4	-9.9%
Trade		133,150	129,554	2.8%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	427.8	12.9%	32.74	11.3x	10.1x
British American Tobacco Bangladesh Company Limited	214.2	6.5%	44.92	23.0x	8.8x
Square Pharmaceuticals	198.4	6.0%	21.60	16.3x	3.2x
United Power Generation & Distribution Company Ltd	194.8	5.9%	178.65	26.3x	13.7x
Renata Ltd.	96.0	2.9%	32.62	27.8x	5.8x
BRAC Bank	75.1	2.3%	23.21	13.4x	1.8x
Investment Corporation of Bangladesh	73.7	2.2%	.68	31.3x	2.8x
Berger Paints	70.8	2.1%	6.46	37.3x	10.6x
Marico Bangladesh Limited	56.4	1.7%	14.23	29.8x	38.3x
LafargeHolcim Bangladesh Limited	45.5	1.4%	21.96	36.6x	3.0x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	130.1	9.7%	21.60	16.3x	3.2x
British American Tobacco Bangladesh Company Limited	56.6	4.2%	44.92	23.0x	8.8x
Renata Ltd.	46.9	3.5%	32.62	27.8x	5.8x
Grameenphone Ltd.	42.8	3.2%	32.74	11.3x	10.1x
BRAC Bank	41.8	3.1%	23.21	13.4x	1.8x
Olympic Industries	31.7	2.4%	8.21	23.8x	7.0x
Beximco Pharmaceuticals	29.6	2.2%	11.81	12.0x	1.2x
Eastern Bank	29.3	2.2%	2.27	8.6x	1.1x
City Bank	19.6	1.5%	12.92	10.7x	1.1x
United Power Generation & Distribution Company Ltd	19.5	1.4%	178.65	26.3x	13.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Advent Pharma Limited	32.30	32.30	0.81	25,000	1
Beximco Pharmaceuticals	83.70	83.70	1.51	18,000	3
Fu Wang Food	13.90	13.90	6.95	500,000	1
Genex Infosys Limited	59.00	59.00	0.50	8,500	1
Pharma Aids	530.00	530.00	0.53	1,000	1
Paramount Textile Limited	64.00	61.00	14.17	222,500	2
Renwick Jaineswar	1,460.00	1,460.00	0.80	550	1
Rupali Life Insurance Co. Ltd.	47.50	47.50	7.13	150,000	1
SK Trims & Industries Limited	49.90	49.90	1.85	37,000	2

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
ATCSLGF	Asian Tiger Sandhani Life Growth Fund		0.0%	7.5%	30-Jun-2019	26-Aug-2019

Important DSE News

PHENIXINS

Mrs. Meherun Haque, one of the Sponsors of the Company has expressed her intention to transfer her entire holding of 3,41,279 shares of the Company to her daughter Ms. Sadaf Shamshad Haque, 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.

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.

IFIC

Referring to their earlier news disseminated on 16.05.2019, the Company has further informed that the Board of Directors has decided to revise the ratio of Right Shares to 1R:4 (1 Right Share for every 4 shares held) instead of earlier recommended 1R:1 (1 Right Share for every 1 share held) subject to the approval of the shareholders in the EGM and by the BSEC. Date of EGM: 10.10.2019, Time and Venue for EGM: 10:30 AM and Officers' Club, 26, Bailey Road, Ramna, Dhaka- 1000 (subject to availability of the venue) respectively. Record Date for EGM: 16.09.2019. Another record date will be declared after obtaining approval from the BSEC.