

Daily Market Update

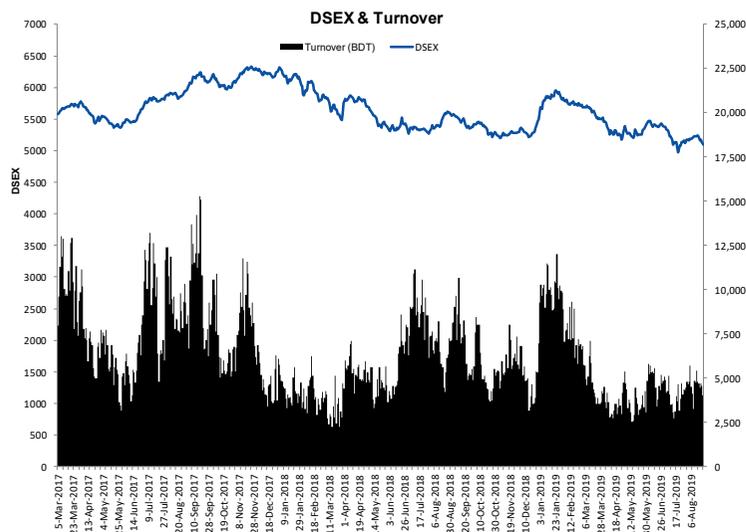
Market closed in red today. The benchmark index DSEX (-0.86%) lost 44.22 points and closed at 5,095.78 points today. The blue chip index DS30 (-0.97%) and the shariah based index DSES (-0.76%) both closed in red. The large cap sectors showed negative performance today except Pharmaceuticals (+0.03%) and Power (+0.03%). Telecommunication posted the highest loss of 1.66% followed by Engineering (-1.48%), Food & Allied (-1.36%), Banks (-1.10%), and NBFIs (-0.61%). Turnover stood at BDT 4.0 billion (USD 48.5 million). United Power Generation & Distribution Company Ltd. (+0.5%) was the most traded share with a turnover of BDT 196.9 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,375.00	1,390.25	-15.25	-1.10%	30	561,213.3	17.28%	256.6	6.40%
NBFIs	1,743.73	1,754.43	-10.70	-0.61%	23	161,205.5	4.96%	51.1	1.27%
Mutual Funds	635.60	633.63	1.98	0.31%	37	33,030.6	1.02%	161.5	4.03%
General Insurance	1,809.91	1,829.70	-19.79	-1.08%	35	49,025.4	1.51%	179.5	4.48%
Life Insurance	2,198.08	2,201.47	-3.38	-0.15%	12	61,285.7	1.89%	66.4	1.66%
Telecommunication	4,374.30	4,448.14	-73.84	-1.66%	2	439,647.6	13.54%	126.0	3.15%
Pharmaceuticals	2,855.41	2,854.69	0.72	0.03%	32	538,541.8	16.58%	838.3	20.92%
Fuel & Power	1,939.95	1,939.39	0.55	0.03%	20	480,910.1	14.81%	422.2	10.54%
Cement	1,390.54	1,402.09	-11.55	-0.82%	7	84,565.1	2.60%	20.0	0.50%
Services & Real Estate	997.64	996.57	1.06	0.11%	8	39,087.9	1.20%	57.5	1.44%
Engineering	2,966.89	3,011.44	-44.55	-1.48%	39	193,229.4	5.95%	792.0	19.77%
Food & Allied	15,114.48	15,322.32	-207.84	-1.36%	17	278,163.6	8.56%	140.0	3.49%
IT	1,871.77	1,885.75	-13.99	-0.74%	9	20,694.7	0.64%	110.7	2.76%
Textiles	1,275.89	1,293.61	-17.72	-1.37%	55	123,739.3	3.81%	329.8	8.23%
Paper & Printing	6,817.72	6,915.35	-97.64	-1.41%	3	13,034.8	0.40%	15.1	0.38%
Tannery	2,373.26	2,376.41	-3.14	-0.13%	6	25,556.1	0.79%	74.2	1.85%
Jute	17,855.80	17,712.57	143.24	0.81%	3	3,946.2	0.12%	12.9	0.32%
Ceramics	526.07	530.43	-4.36	-0.82%	5	25,409.0	0.78%	140.9	3.52%
Miscellaneous	2,088.61	2,092.21	-3.59	-0.17%	13	115,890.3	3.57%	211.7	5.29%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Prime Finance First MF	16.20	9.5%	28.5
SEML FBLSL Growth Fund	19.40	9.0%	16.1
Standard Ceramic	413.10	6.8%	59.7
United Airways (BD) Ltd.	2.00	5.3%	2.4
Silco Pharmaceuticals Limited	35.10	5.1%	133.1
Reckitt Benckiser	2,951.90	4.9%	38.2
Dulamia Cotton	47.40	4.9%	.2
Doreen Power Generations and Systems Limited	79.80	4.9%	75.3
Jute Spinners	87.90	4.8%	.1
EXIM Bank 1st Mutual Fund	4.70	4.4%	1.2

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Southeast Bank 1st Mutual Fund	10.80	-9.2%	2.8
Meghna Condensed Milk	14.30	-8.3%	.2
NLI First Mutual Fund	11.70	-7.9%	9.0
National Polymer	112.00	-7.6%	129.7
Prime Finance	7.50	-7.4%	2.9
Aftab Automobiles Limited	32.10	-6.7%	7.9
Tallu Spinning	4.80	-5.9%	.3
DBH First Mutual Fund	8.10	-5.8%	1.3
Fareast Finance & Investment Limited	3.40	-5.6%	.3
Delta Spinnings Ltd.	5.20	-5.5%	.2

Most Traded Share	Close	Δ%	Turnover (mn BDT)
United Power Generation & Distribution Company Ltd	395.10	0.5%	196.9
Silco Pharmaceuticals Limited	35.10	5.1%	133.1
National Polymer	112.00	-7.6%	129.7
Shurwid Industries Limited	26.80	0.4%	119.7
Wata Chemicals Limited	593.70	1.1%	105.3
Monno Jute Staffers	1,512.90	2.6%	104.6
National Tubes	126.20	-0.4%	94.8
Beacon Pharmaceuticals Limited	25.40	0.0%	90.0
Grameenphone Ltd.	312.00	-1.5%	77.0
Doreen Power Generations and Systems Limited	79.80	4.9%	75.3



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	5,095.78	5,140.00	-44.22	-0.86%	-5.38%
DS30	1,800.06	1,817.71	-17.66	-0.97%	-4.29%
DSES	1,183.44	1,192.55	-9.11	-0.76%	-4.01%

	Advanced	Declined	Unchanged	Total
All Category	78	236	39	353
A Category (Equity)	63	175	27	265
B Category (Equity)	3	32	4	39
N Category (Equity)	3	5	1	9
Z Category (Equity)	9	24	7	40
Mutual Funds	19	5	13	37
Corporate Bonds	0	1	0	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,808,457.2	3,833,288.1	
	Mn USD	45,813.3	46,112.0	-0.6%
Turnover	Mn BDT	4,029.2	4,567.1	
	Mn USD	48.5	54.9	-11.8%
Volume	Mn Shares	112.7	112.9	-0.2%
Trade		118,714	133,766	-11.3%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	421.3	13.0%	76.96	11.2x	9.9x
British American Tobacco Bangladesh Company Limited	217.8	6.7%	39.53	23.4x	9.0x
Square Pharmaceuticals	198.8	6.1%	42.43	16.3x	3.2x
United Power Generation & Distribution Company Ltd	189.3	5.8%	196.86	25.5x	13.3x
Renata Ltd.	95.7	2.9%	10.36	27.7x	5.8x
Berger Paints	73.0	2.2%	16.11	38.5x	10.9x
BRAC Bank	71.4	2.2%	28.36	12.8x	1.7x
Investment Corporation of Bangladesh	71.2	2.2%	.64	30.3x	2.7x
Marico Bangladesh Limited	58.0	1.8%	30.22	30.6x	39.4x
LafargeHolcim Bangladesh Limited	44.8	1.4%	11.17	36.0x	2.9x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	130.3	9.9%	42.43	16.3x	3.2x
British American Tobacco Bangladesh Company Limited	57.6	4.4%	39.53	23.4x	9.0x
Renata Ltd.	46.7	3.6%	10.36	27.7x	5.8x
Grameenphone Ltd.	42.1	3.2%	76.96	11.2x	9.9x
BRAC Bank	39.8	3.0%	28.36	12.8x	1.7x
Olympic Industries	29.9	2.3%	34.40	22.5x	6.6x
Beximco Pharmaceuticals	29.6	2.2%	27.29	11.9x	1.2x
Eastern Bank	27.4	2.1%	9.32	8.1x	1.0x
United Power Generation & Distribution Company Ltd	18.9	1.4%	196.86	25.5x	13.3x
Islami Bank	18.9	1.4%	2.44	5.6x	0.6x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Al-Haj Textile Mills Limited	76.70	76.70	0.77	10,000	1
BRAC Bank	59.00	59.00	1.77	30,000	1
Glaxo Smithkline	1,750.00	1,750.00	1.75	1,000	1
Pragati Insurance	34.00	34.00	6.93	203,900	1
Pragati Life Insurance	153.80	153.80	1.23	8,000	1
Reckitt Benckiser	2,900.00	2,900.00	2.03	700	1
Runner Automobiles Limited	97.50	97.50	1.04	10,700	1
Shahjalal Islami Bank	24.30	24.30	0.54	22,000	1
Silco Pharmaceuticals Limited	34.00	34.00	3.40	100,000	1
Square Pharmaceuticals	252.20	252.20	1.46	5,800	1
S. S. Steel Limited	31.20	31.20	1.56	50,000	1

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
MEGHNALIFE	Meghna Life Insurance Co. Ltd.		0.0%	20.0%	31-Dec-2018	1-Sep-2019
CAPMBDBLMF	CAPM BDBL Mutual Fund 01		0.0%	5.0%	30-Jun-2019	1-Sep-2019
CAPMIBBLMF	CAPM IBBL Islamic Mutual Fund		0.0%	8.0%	30-Jun-2019	1-Sep-2019
RUPALILIFE	Rupali Life Insurance Co. Limited		0.0%	12.0%	31-Dec-2018	1-Sep-2019
SANDHANINS	Sandhani Life Insurance Company Ltd.		0.0%	15.0%	31-Dec-2018	3-Sep-2019
SEMLLECMF	SEML Lecture Equity Management Fund		0.0%	5.0%	30-Jun-2019	3-Sep-2019
RELIANCE1	"Reliance One" the first scheme of Reliance Insurance Mutual Fund		0.0%	10.0%	30-Jun-2019	3-Sep-2019
SEMLFBSLGF	SEML FBLSL Growth Fund		0.0%	5.0%	30-Jun-2019	3-Sep-2019
SEMLIBBLSF	SEML IBBL Shariah Fund		0.0%	5.0%	30-Jun-2019	3-Sep-2019
GRAMEENS2	Grameen One: Scheme Two		0.0%	9.0%	30-Jun-2019	3-Sep-2019
ICBAMCL2ND	ICB AMCL Second Mutual Fund		0.0%	6.0%	30-Jun-2019	3-Sep-2019
ICBEPMF1S1	ICB Employees Provident MF 1: Scheme 1		0.0%	4.5%	30-Jun-2019	3-Sep-2019
PRIME1ICBA	Prime Bank 1st ICB AMCL Mutual Fund		0.0%	6.0%	30-Jun-2019	3-Sep-2019
PF1STMF	Phoenix Finance 1st Mutual Fund		0.0%	5.0%	30-Jun-2019	3-Sep-2019
ICB3RDNRB	ICB AMCL Third NRB Mutual Fund		0.0%	4.0%	30-Jun-2019	3-Sep-2019
IFILISLMF1	IFIL Islamic Mutual Fund-1		0.0%	6.0%	30-Jun-2019	3-Sep-2019
ICBSONAL11	ICB AMCL Sonali Bank Limited 1st Mutual Fund		0.0%	6.0%	30-Jun-2019	3-Sep-2019
ICBAGRAN11	ICB AMCL First Agrani Bank Mutual Fund		0.0%	5.0%	30-Jun-2019	3-Sep-2019

Important DSE News
PEOPLESINS

Mr. Jafar Ahmed Patwari, one of the Directors of the Company, has expressed his intention to buy 50,000 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

PRAGATIINS

Mr. ASM Mohiuddin Monem, one of the Public Directors of the Company, has expressed his intention to buy 6,67,274 shares of the Company at prevailing market price (In the Public Market 4,63,374 shares and Block Market 2,03,900 shares) through Stock Exchange (DSE) within next 30 working days.

SHURWID

Dhaka Stock Exchange Limited (DSE) has accorded its consent to transfer of 14,30,000 shares of Shurwid Industries Limited outside the trading system of the exchange from Mr. Zahedul Hoque, one of the Sponsors of Shurwid Industries Limited (the transferor/pledgor) to NRB Bank Ltd. (the transferee/pledgee) within 30 working days from the date of issuance of approval letter by DSE, under Regulation-47 of the Dhaka Stock Exchange (Listing) Regulations, 2015.

APEXTANRY

The Board of Directors has recommended 35% cash dividend for the year ended on June 30,

2019. Date of AGM: 21.10.2019, Time: 10:00 AM, Venue: Bangladesh Shooting Sports Federation, Gulshan-1, Dhaka-1212. Record date: 25.09.2019. The Company has also reported EPS without fair valuation surplus of Tk. 1.41, NAV per share of Tk. 69.21 and NOCFPS of Tk. (16.12) for the year ended on June 30, 2019 as against Tk. 2.53, Tk. 72.24 and Tk. 10.28 respectively for the same period of the previous year. The Company has also informed that NOCFPS decreased significantly from December, 2017 to 2018, mainly due to increase in inventories and trade receivables as well as increase in financial expenses.