

Daily Market Update

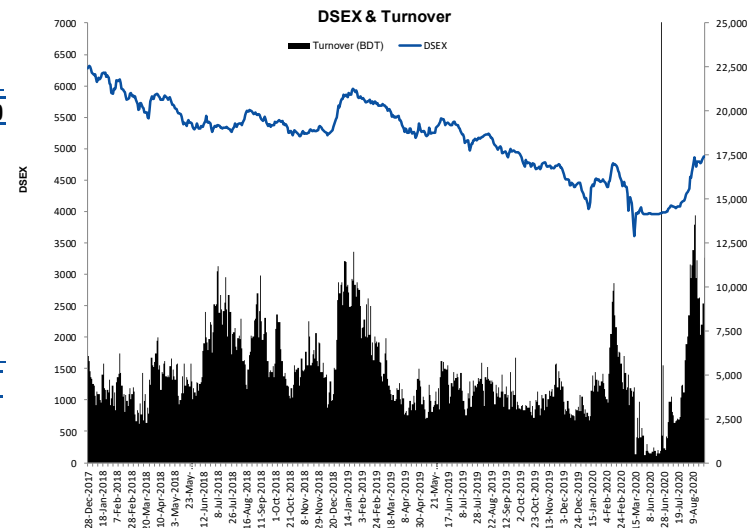
The market closed in green today. The benchmark index DSEX (+0.12%) gained 5.97 points and closed at 4,879.15. The blue-chip index DS30 (+0.56%), the Shariah-based index DSES (+0.20%), and the large-cap index CDSET (+0.58%) closed at 1,699.55, 1,132.85, and 994.61 points, respectively. Large-cap sectors posted mixed performance today. NBFIs booked the highest gain of 2.60% followed by Telecommunication (+0.91%), Pharmaceutical (+0.53%), and Bank (+0.35%). Food & Allied experienced the highest loss of 1.75% followed by Engineering (-0.80%), and Fuel & Power (-0.10%). Block trades contributed 9.9% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+6.7%) was the most traded share with a turnover of BDT 1,399 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover (mn BDT)	% of Total Turnover
Banks	1,325.42	1,320.79	4.63	0.35%	30	540,261.3	17.16%	1,110.1	10.55%
NBFIs	1,816.17	1,770.07	46.11	2.60%	23	167,906.9	5.33%	911.2	8.66%
Mutual Funds	666.51	669.92	-3.42	-0.51%	37	34,637.5	1.10%	211.6	2.01%
General Insurance	2,345.84	2,431.21	-85.37	-3.51%	36	63,380.8	2.01%	560.7	5.33%
Life Insurance	2,039.33	2,052.29	-12.95	-0.63%	12	56,859.6	1.81%	87.1	0.83%
Telecommunication	4,488.67	4,448.37	40.30	0.91%	2	451,142.4	14.33%	317.5	3.02%
Pharmaceuticals	3,052.74	3,036.68	16.06	0.53%	32	575,446.8	18.27%	2,882.3	27.40%
Fuel & Power	1,711.85	1,713.58	-1.73	-0.10%	19	424,366.3	13.48%	629.5	5.99%
Cement	1,398.57	1,429.35	-30.78	-2.15%	7	85,054.9	2.70%	301.1	2.86%
Services & Real Estate	1,001.55	1,004.48	-2.93	-0.29%	8	39,986.7	1.27%	50.2	0.48%
Engineering	2,353.25	2,372.14	-18.89	-0.80%	39	152,699.4	4.85%	787.6	7.49%
Food & Allied	13,482.19	13,721.73	-239.54	-1.75%	17	248,971.9	7.91%	397.1	3.78%
IT	2,118.70	2,085.41	33.29	1.60%	9	23,424.8	0.74%	256.5	2.44%
Textiles	1,095.32	1,096.13	-0.81	-0.07%	56	110,553.8	3.51%	610.5	5.80%
Paper & Printing	6,194.55	6,029.81	164.74	2.73%	4	15,473.8	0.49%	69.3	0.66%
Tannery	1,762.47	1,797.17	-34.70	-1.93%	6	18,868.5	0.60%	80.2	0.76%
Jute	10,183.25	10,432.36	-249.11	-2.39%	3	2,250.5	0.07%	59.6	0.57%
Ceramics	440.44	444.89	-4.45	-1.00%	5	22,331.9	0.71%	119.7	1.14%
Miscellaneous	2,083.12	2,087.63	-4.51	-0.22%	13	115,585.5	3.67%	1,075.8	10.23%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Bay Leasing	16.50	10.0%	12.6
Tung Hai Knitting & Dyeing Limited	3.30	10.0%	.7
Miracle Ind.	26.90	9.8%	38.0
BD Finance	12.70	9.5%	63.3
Golden Son Ltd.	7.00	9.4%	1.7
Savar Refractories	277.50	8.7%	.8
GQ Ball Pen	195.60	8.7%	37.8
C & A Textiles Limited	2.60	8.3%	2.1
Salvo Chemical Industry Limited	13.00	8.3%	4.6
Midas Financing Ltd.	15.60	7.6%	13.7

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
CAPM IBBL Islamic Mutual Fund	11.10	-9.8%	24.3
Peoples Insurance	31.50	-8.2%	29.9
Federal Insurance	14.80	-6.9%	20.9
Pioneer Insurance	61.60	-6.5%	60.8
Desh Garments	150.60	-6.4%	7.1
Samata Leather	116.90	-6.2%	29.7
Queen South Textiles Mills Limited	31.60	-6.0%	23.1
Eastern Insurance	90.10	-5.8%	25.6
EBL First MF	5.00	-5.7%	7.5
Republic Insurance	32.00	-5.6%	19.3

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Beximco Pharmaceuticals	115.50	6.7%	1,398.5
Beximco Limited	26.70	2.7%	747.5
BRAC Bank	39.70	4.7%	462.5
Delta Brac Housing	93.00	0.4%	428.0
Square Pharmaceuticals	218.90	1.2%	337.5
Orion Pharma Ltd.	58.60	-1.8%	295.2
LafargeHolcim Bangladesh Limited	44.10	-2.9%	230.1
Grameenphone Ltd.	318.40	1.1%	205.1
IFIC Bank	11.80	0.9%	194.6
Lankabangla Finance	18.70	6.2%	155.0



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,879.15	4,873.18	5.97	0.12%	9.57%
DS30	1,699.55	1,690.10	9.44	0.56%	12.30%
DSES	1,132.85	1,130.61	2.24	0.20%	13.30%
CDSET	994.61	988.88	5.73	0.58%	10.54%

	Advanced	Declined	Unchanged	Total
All Category	116	191	41	348
A Category (Equity)	71	150	28	249
B Category (Equity)	11	27	8	46
N Category (Equity)	1	1	0	2
Z Category (Equity)	33	13	5	51
Mutual Funds	7	12	10	29
Corporate Bonds	2	0	0	2

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,698,344.9	3,696,562.0	
	Mn USD	43,530.4	43,509.4	0.0%
Turnover	Mn BDT	11,667.8	9,071.4	28.6%
	Mn USD	137.3	106.8	
Volume	Mn Shares	318.4	272.8	16.7%
Trade		198,801	188,217	5.6%

Top Twenty Market Cap	Mcap (Bn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	429.9	13.7%	205.15	12.6x	10.1x
British American Tobacco Bangladesh Company Limited	193.6	6.1%	135.86	22.3x	8.0x
Square Pharmaceuticals	184.8	5.9%	337.50	13.5x	2.8x
United Power Generation & Distribution Company Ltd	142.0	4.5%	60.08	19.8x	9.6x
Renata Ltd.	105.0	3.3%	15.33	24.5x	5.8x
Investment Corporation of Bangladesh	78.7	2.5%	22.51	NM	3.8x
Berger Paints	67.4	2.1%	14.56	27.8x	10.0x
Marico Bangladesh Limited	62.5	2.0%	17.23	22.4x	42.4x
BRAC Bank	52.6	1.7%	462.54	11.7x	1.2x
LafargeHolcim Bangladesh Limited	51.2	1.6%	230.06	28.5x	3.4x
Beximco Pharmaceuticals	46.8	1.5%	1,398.53	13.7x	1.7x
Summit Power	45.0	1.4%	120.40	7.9x	1.7x
Islami Bank	40.1	1.3%	24.02	7.3x	0.7x
Olympic Industries	36.5	1.2%	13.20	18.0x	5.8x
Dutch-Bangla Bank	35.5	1.1%	11.35	7.7x	1.1x
Titas Gas	34.9	1.1%	18.54	9.0x	0.5x
Eastern Bank	30.0	1.0%	11.74	7.5x	1.1x
National Life Insurance Company Ltd.	28.0	0.9%	.00	NM	25.8x
Glaxo Smithkline	27.8	0.9%	6.41	48.8x	22.2x
MJL Bangladesh Limited	26.8	0.9%	8.73	14.6x	4.2x

Top Twenty Free Float Mcap	Free Float Mcap (Bn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	120.9	9.5%	337.50	13.5x	2.8x
Renata Ltd.	51.3	4.0%	15.33	24.5x	5.8x
British American Tobacco Bangladesh Company Limited	51.2	4.0%	135.86	22.3x	8.0x
Grameenphone Ltd.	43.0	3.4%	205.15	12.6x	10.1x
Beximco Pharmaceuticals	40.7	3.2%	1,398.53	13.7x	1.7x
BRAC Bank	29.3	2.3%	462.54	11.7x	1.2x
Olympic Industries	26.4	2.1%	13.20	18.0x	5.8x
Eastern Bank	20.5	1.6%	11.74	7.5x	1.1x
Islami Bank	20.5	1.6%	24.02	7.3x	0.7x
Beximco Limited	18.7	1.5%	747.46	24.7x	0.4x
LafargeHolcim Bangladesh Limited	18.1	1.4%	230.06	28.5x	3.4x
Pubali Bank	16.6	1.3%	2.81	11.0x	0.8x
Summit Power	16.6	1.3%	120.40	7.9x	1.7x
National Bank	16.2	1.3%	16.02	5.1x	0.5x
City Bank	15.8	1.2%	85.96	8.3x	0.9x
United Power Generation & Distribution Company Ltd	14.2	1.1%	60.08	19.8x	9.6x
Southeast Bank	12.3	1.0%	53.11	5.2x	0.5x
Beacon Pharmaceuticals Limited	12.1	1.0%	74.39	150.8x	5.9x
IFIC Bank	12.0	0.9%	194.64	6.6x	0.6x
Prime Bank	11.7	0.9%	3.31	11.1x	0.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Bangas Ltd.	152.00	152.00	0.61	4,000	1
BRAC Bank	39.90	38.70	35.05	889,000	26
Beximco Pharmaceuticals	119.00	109.00	947.58	8,591,600	10
CAPM IBBL Islamic Mutual Fund	11.50	11.10	4.55	400,004	5
Daffodil Computers Ltd.	68.60	68.60	1.78	26,000	2
M.L. Dyeing Limited	48.20	46.10	4.88	104,399	8
Mutual Trust Bank	21.90	21.90	87.60	4,000,000	7
Orion Infusion	77.40	77.40	0.99	12,800	1

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Orion Pharma Ltd.	60.60	60.60	2.42	40,000	4
Paramount Textile Limited	56.00	56.00	8.40	150,000	1
Rupali Life Insurance Co. Ltd.	53.00	53.00	0.53	10,000	1
Saif Powertec Limited	15.50	15.50	1.09	70,000	1
Sandhani Life Ins	24.10	23.50	48.77	2,065,074	5
Sea Pearl Beach Resort & Spa Limited	79.10	71.20	5.05	67,339	8
Standard Insurance	38.00	38.00	0.50	13,200	1
Total			1,149.80		81

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
SEMLFBSLGF	SEML FBSL Growth Fund	-	0.0%	2.5%	30-Jun-20	01-Sep-20
SANDHANINS	Sandhani Life Insurance Company Ltd.	-	0.0%	12.0%	31-Dec-19	01-Sep-20
AGRANINS	Agrani Insurance Company Limited	-	0.0%	10.0%	31-Dec-19	02-Sep-20
GSPFINANCE	GSP Finance Company (Bangladesh)	-	4.5%	6.0%	31-Dec-19	03-Sep-20
GRAMEENS2	Grameen One: Scheme Two	-	0.0%	7.0%	30-Jun-20	06-Sep-20
PRAGATILIF	Pragati Life Insurance Ltd.	1R:1	0.0%	0.0%	-	07-Sep-20
SEBL1STMF	Southeast Bank 1st Mutual Fund	-	0.0%	3.0%	30-Jun-20	09-Sep-20
NLI1STMF	NLI First Mutual Fund	-	0.0%	5.0%	30-Jun-20	09-Sep-20

Important DSE News

RUPALILIFE

The Board of Directors has recommended 12% cash and 2% stock dividend for the year ended on December 31, 2019. Date of AGM: 28.10.2020, Time: 10:00 AM, Venue: Digital Platform. Record Date: 01.10.2020.

(Q1 Un-audited): Increase in life revenue account for January-March, 2020 was Tk. 5.27 million with total life insurance fund of Tk. 4,769.65 million as against increase in life revenue account of Tk. 5.67 million and Tk. 4,509.66 million respectively for the same period of the previous year.

(Q2 Un-audited): Increase in life revenue account for April-June, 2020 was Tk. 70.65 million with total life insurance fund of Tk. 4,840.29 million as against increase of Tk. 14.24 million and Tk. 4,523.90 million respectively for the same period of the previous year. Increase in life revenue account for Jan-June, 2020 was Tk. 72.97 million with total life insurance fund of Tk. 4,837.34 million as against Tk. 19.91 million and Tk. 4,523.90 million respectively for the same period of the previous year.

SONALIANS

(Q3 Un-audited): EPS was Tk. 0.13 for January-March 2020 as against Tk. 0.41 for January-March 2019; EPS was Tk. 1.36 for July 2019-March 2020 as against Tk. 0.81 for July 2018-March 2019. NOCFPS was Tk. 4.33 for July 2019-March 2020 as against Tk. (7.21) for July 2018-March 2019. NAV per share was Tk. 227.27 as on March 31, 2020 and Tk. 226.71 as on March 31, 2019.

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WMSHIPYARD

(Q3 Un-audited): EPS was Tk. 0.14 for January-March 2020 as against Tk. 0.65 for January-March 2019; EPS was Tk. 1.08 for July 2019-March 2020 as against Tk. 1.90 for July 2018-March 2019. NOCFPS was Tk. 0.36 for July 2019-March 2020 as against Tk. 0.10 for July 2018-March 2019. NAV per share was Tk. 24.28 as on March 31, 2020 and Tk. 30.26 as on June 30, 2019.

SINGERBD

The Company has informed that the Board of Directors has approved to the amalgamation of the Company with its 100% subsidiary International Appliance Limited (IAL), whereby IAL will merge with the Company, and the Company shall be the surviving entity. The approval is subject to requisite approval of the banks and other creditors to the Company, approval of the shareholders of the Company and finally, sanction of the Hon'ble High Court Division of the Supreme Court of Bangladesh.

ALARABANK

Mr. Badsha Meah, one of the Sponsors of the Company, has expressed his intention to transfer 1,78,00,000 shares out of his total holding of 2,12,98,602 shares to his son Mr. Md. Rafiqul Islam, 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.

NCCBANK

Mr. Abdus Salam, one of the Sponsor Directors of the Company, has expressed his intention to buy 10,00,000 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.