

Daily Market Update

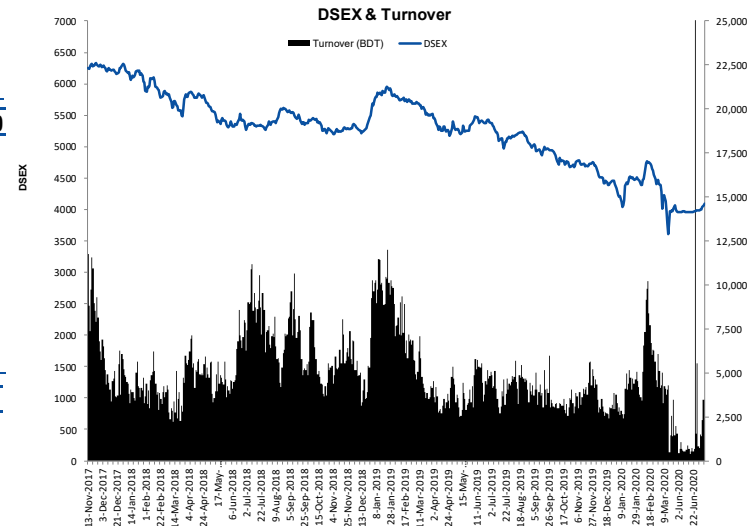
The market closed in green today. The benchmark index DSEX (+0.93%) gained 37.86 points and closed at 4,099.42. The blue-chip index DS30 (+1.05%), the Shariah-based index DSES (+1.69%), and the large cap index CDSET (+0.89%) closed at 1,383.71, 954.87, and 813.27 points respectively. Large cap sectors posted positive performance today except Bank (-0.25%). Telecommunication booked the highest gain of 1.99% followed by Pharmaceuticals (+1.94%), NBFIs (+1.67%), Power (1.51%), Engineering (+1.07%) and Food & Allied (+0.92%). Block trade contributed 11.1% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+1.4%) was the most traded share with a turnover of BDT 175 million.

| Sector Index | Closing | Opening | Δ(Pts) | Δ% | No. of Cos | Sectoral Mcap (mn BDT) | % of Total Mcap | Sectoral Turnover (mn BDT) | % of Total Turnover |
|------------------------|-----------|-----------|--------|--------|------------|------------------------|-----------------|----------------------------|---------------------|
| Banks | 1,125.32 | 1,128.20 | -2.88 | -0.25% | 30 | 458,681.2 | 17.53% | 234.0 | 7.59% |
| NBFIs | 1,401.29 | 1,378.21 | 23.08 | 1.67% | 23 | 129,548.5 | 4.95% | 40.0 | 1.30% |
| Mutual Funds | 577.09 | 575.43 | 1.66 | 0.29% | 37 | 29,990.7 | 1.15% | 87.6 | 2.84% |
| General Insurance | 1,632.11 | 1,641.55 | -9.45 | -0.58% | 35 | 44,096.6 | 1.69% | 161.5 | 5.24% |
| Life Insurance | 1,834.67 | 1,813.27 | 21.41 | 1.18% | 12 | 51,153.4 | 1.96% | 75.9 | 2.46% |
| Telecommunication | 3,432.57 | 3,365.74 | 66.83 | 1.99% | 2 | 344,997.0 | 13.19% | 203.8 | 6.61% |
| Pharmaceuticals | 2,545.93 | 2,497.42 | 48.51 | 1.94% | 32 | 479,909.1 | 18.34% | 996.9 | 32.33% |
| Fuel & Power | 1,466.00 | 1,444.20 | 21.80 | 1.51% | 19 | 363,420.0 | 13.89% | 225.9 | 7.33% |
| Cement | 1,183.28 | 1,182.34 | 0.93 | 0.08% | 7 | 71,961.7 | 2.75% | 4.6 | 0.15% |
| Services & Real Estate | 955.40 | 951.50 | 3.90 | 0.41% | 8 | 38,144.3 | 1.46% | 11.4 | 0.37% |
| Engineering | 2,051.21 | 2,029.49 | 21.72 | 1.07% | 39 | 133,100.4 | 5.09% | 407.8 | 13.22% |
| Food & Allied | 11,407.34 | 11,303.70 | 103.63 | 0.92% | 17 | 210,655.0 | 8.05% | 123.7 | 4.01% |
| IT | 1,808.50 | 1,778.51 | 29.99 | 1.69% | 9 | 19,995.1 | 0.76% | 59.2 | 1.92% |
| Textiles | 964.09 | 950.71 | 13.38 | 1.41% | 56 | 97,308.0 | 3.72% | 161.2 | 5.23% |
| Paper & Printing | 5,125.55 | 5,052.83 | 72.72 | 1.44% | 3 | 9,799.6 | 0.37% | 6.3 | 0.21% |
| Tannery | 1,667.26 | 1,667.26 | 0.00 | 0.00% | 6 | 17,849.2 | 0.68% | 10.0 | 0.32% |
| Jute | 8,085.94 | 8,080.70 | 5.25 | 0.06% | 3 | 1,787.0 | 0.07% | 22.8 | 0.74% |
| Ceramics | 391.93 | 389.73 | 2.20 | 0.56% | 5 | 19,872.2 | 0.76% | 86.5 | 2.81% |
| Miscellaneous | 1,698.51 | 1,692.60 | 5.91 | 0.35% | 13 | 94,245.0 | 3.60% | 164.3 | 5.33% |

| Top Ten Gainers | Close | Δ% | Turnover (mn BDT) |
|--------------------------------------|--------|-------|-------------------|
| M.L. Dyeing Limited | 55.00 | 10.0% | 91.3 |
| GQ Ball Pen | 84.90 | 10.0% | 22.3 |
| Zeal Bangla Sugar Mills | 34.60 | 9.5% | .4 |
| Shaympur Sugar | 25.80 | 8.4% | .3 |
| IT Consultants Limited | 31.80 | 8.2% | 25.1 |
| MJL Bangladesh Limited | 73.30 | 7.5% | 33.4 |
| BD Autocars | 158.30 | 7.0% | 20.9 |
| Aramit Cement Limited | 13.00 | 6.6% | .0 |
| Nahee Aluminium Composite Panel Ltd. | 52.20 | 6.5% | 77.0 |
| Anwar Galvanizing Ltd. | 72.10 | 6.3% | 7.3 |

| Top Ten Losers | Close | Δ% | Turnover (mn BDT) |
|----------------------------------|-------|-------|-------------------|
| Pubali Bank | 20.80 | -9.6% | 6.7 |
| Tallu Spinning | 3.00 | -9.1% | .3 |
| Dacca Dyeing | 4.50 | -6.3% | .1 |
| Appollo Ispat Complex Limited | 3.10 | -6.1% | .9 |
| C & A Textiles Limited | 1.70 | -5.6% | .9 |
| Paramount Insurance | 62.50 | -5.4% | 51.1 |
| Metro Spinning | 8.60 | -4.4% | 4.6 |
| Generation Next Fashions Limited | 2.20 | -4.3% | .8 |
| Global Insurance Ltd. | 16.80 | -4.0% | 6.1 |
| Lankabangla Finance | 13.20 | -3.6% | 13.1 |

| Most Traded Share | Close | Δ% | Turnover (mn BDT) |
|--|--------|-------|-------------------|
| Beximco Pharmaceuticals | 73.40 | 1.4% | 175.3 |
| Bangladesh Submarine Cable Company Limited | 92.50 | 5.4% | 125.3 |
| Square Pharmaceuticals | 180.70 | 3.3% | 113.7 |
| Beacon Pharmaceuticals Limited | 73.30 | 1.9% | 105.8 |
| M.L. Dyeing Limited | 55.00 | 10.0% | 91.3 |
| Indo-Bangla Pharmaceuticals Limited | 21.20 | 1.9% | 88.3 |
| Orion Infusion | 74.90 | 3.5% | 87.5 |
| Orion Pharma Ltd. | 45.00 | 4.7% | 86.5 |
| Monno Ceramic | 129.90 | 2.4% | 81.9 |
| Grameenphone Ltd. | 244.20 | 1.8% | 78.5 |



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 | 4,099.42 | 4,061.57 | 37.86 | 0.93% | -7.94% |
| DS30 | 1,383.71 | 1,369.37 | 14.34 | 1.05% | -8.57% |
| DSES | 954.87 | 938.96 | 15.91 | 1.69% | -4.50% |
| CDSET | 813.27 | 806.10 | 7.17 | 0.89% | -9.61% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 122 | 59 | 169 | 350 |
| A Category (Equity) | 101 | 39 | 115 | 255 |
| B Category (Equity) | 10 | 10 | 28 | 48 |
| N Category (Equity) | 0 | 0 | 1 | 1 |
| Z Category (Equity) | 11 | 10 | 25 | 46 |
| Mutual Funds | 7 | 4 | 26 | 37 |
| Corporate Bonds | 2 | 0 | 0 | 2 |

| Market Stat | Today | Last Day | % Change | |
|-------------|-----------|-------------|-------------|-------|
| Mcap | Mn BDT | 3,178,797.0 | 3,150,006.5 | 0.9% |
| | Mn USD | 37,415.2 | 37,076.3 | |
| Turnover | Mn BDT | 3,469.7 | 3,474.7 | -0.1% |
| | Mn USD | 40.8 | 40.9 | |
| Volume | Mn Shares | 106.7 | 100.5 | 6.2% |
| Trade | | 78,235 | 66,988 | 16.8% |

| Top Ten Market Cap | Mcap (bn BDT) | % of Total Mcap | Turnover (mn BDT) | PE | PB |
|---|---------------|-----------------|-------------------|-------|-------|
| Grameenphone Ltd. | 329.7 | 12.6% | 78.54 | 9.6x | 7.8x |
| British American Tobacco Bangladesh Company Limited | 163.4 | 6.2% | 25.82 | 19.0x | 6.7x |
| Square Pharmaceuticals | 152.6 | 5.8% | 113.73 | 11.5x | 2.3x |
| United Power Generation & Distribution Company Ltd | 117.3 | 4.5% | 24.08 | 14.4x | 8.0x |
| Renata Ltd. | 92.9 | 3.6% | 39.55 | 22.9x | 5.1x |
| Berger Paints | 61.6 | 2.4% | .00 | 25.3x | 9.2x |
| Investment Corporation of Bangladesh | 56.0 | 2.1% | 14.02 | NM | 2.7x |
| Marico Bangladesh Limited | 49.2 | 1.9% | 10.21 | 18.9x | 33.4x |
| BRAC Bank | 42.3 | 1.6% | .75 | 8.6x | 0.9x |
| LafargeHolcim Bangladesh Limited | 41.7 | 1.6% | 2.02 | 23.9x | 2.7x |

| Top Ten Free Float Mcap | Free Float Mcap (bn BDT) | % of Total Free Float | Turnover (mn BDT) | PE | PB |
|---|--------------------------|-----------------------|-------------------|-------|------|
| Square Pharmaceuticals | 99.8 | 9.4% | 113.73 | 11.5x | 2.3x |
| Renata Ltd. | 45.3 | 4.3% | 39.55 | 22.9x | 5.1x |
| British American Tobacco Bangladesh Company Limited | 43.2 | 4.1% | 25.82 | 19.0x | 6.7x |
| Grameenphone Ltd. | 33.0 | 3.1% | 78.54 | 9.6x | 7.8x |
| Beximco Pharmaceuticals | 25.8 | 2.4% | 175.35 | 9.1x | 1.1x |
| BRAC Bank | 23.6 | 2.2% | .75 | 8.6x | 0.9x |
| Olympic Industries | 23.2 | 2.2% | 14.79 | 16.0x | 5.1x |
| Eastern Bank | 17.2 | 1.6% | 6.56 | 6.3x | 0.9x |
| National Bank | 15.3 | 1.4% | 8.77 | 5.4x | 0.4x |
| Pubali Bank | 15.0 | 1.4% | 6.68 | 9.9x | 0.7x |

| Block Trade | Maximum Price | Minimum Price | Turnover (mn BDT) | Quantity | Trade |
|---|---------------|---------------|-------------------|-----------|-------|
| Active Fine Chemicals Limited | 13.30 | 13.30 | 34.18 | 2,570,000 | 1 |
| Aman Feed Limited | 26.80 | 26.80 | 1.30 | 48,500 | 1 |
| British American Tobacco Bangladesh Company Limited | 940.00 | 900.00 | 4.33 | 4,778 | 4 |
| Central Pharmaceuticals Limited | 13.80 | 13.80 | 0.62 | 45,000 | 1 |
| City Bank | 18.10 | 18.10 | 1.63 | 90,000 | 1 |
| Confidence Cement | 87.30 | 87.30 | 0.51 | 5,800 | 1 |
| Delta Brac Housing | 94.60 | 94.60 | 0.50 | 5,290 | 1 |
| DESCO | 34.80 | 34.80 | 77.27 | 2,220,352 | 1 |
| Dutch-Bangla Bank | 61.50 | 56.00 | 2.78 | 47,000 | 2 |
| Fine Foods Ltd | 49.00 | 49.00 | 2.45 | 50,000 | 1 |
| Fu Wang Food | 12.40 | 12.40 | 3.59 | 289,400 | 1 |
| Genex Infosys Limited | 54.00 | 49.30 | 23.27 | 469,761 | 16 |
| Golden Harvest Agro Industries Ltd. | 16.00 | 15.10 | 1.03 | 66,400 | 2 |
| GQ Ball Pen | 84.90 | 84.90 | 0.76 | 9,000 | 1 |
| Hakkani Pulp & Paper | 74.00 | 74.00 | 1.38 | 18,677 | 1 |
| Indo-Bangla Pharmaceuticals Limited | 20.60 | 20.60 | 3.44 | 167,000 | 4 |
| ICB Employees Provident MF 1 Scheme 1 | 6.80 | 6.80 | 1.50 | 220,000 | 1 |
| IFIC Bank | 9.40 | 9.40 | 1.10 | 117,000 | 1 |
| Kohinoor Chemicals | 448.00 | 432.00 | 4.14 | 9,404 | 5 |
| Khulna Power Company Limited | 41.80 | 40.80 | 24.95 | 607,805 | 34 |
| Lankabangla Finance | 14.00 | 14.00 | 0.85 | 61,000 | 1 |
| Legacy Footwear | 63.00 | 63.00 | 0.57 | 9,000 | 1 |
| LafargeHolcim Bangladesh Limited | 33.00 | 33.00 | 0.51 | 15,500 | 1 |
| Mercantile Bank | 10.60 | 10.60 | 0.53 | 50,000 | 1 |
| NCC Bank | 13.40 | 13.40 | 13.74 | 1,025,000 | 8 |
| Paramount Insurance | 70.00 | 65.00 | 80.34 | 1,179,937 | 13 |
| The Peninsula Chittagong Limited | 16.90 | 16.90 | 0.74 | 44,000 | 1 |
| Phoenix Finance | 24.00 | 24.00 | 2.40 | 100,000 | 1 |
| The Premier Bank | 10.00 | 10.00 | 3.09 | 309,000 | 2 |
| Saiham Textile | 26.90 | 26.90 | 0.58 | 21,500 | 1 |

| Block Trade | Maximum Price | Minimum Price | Turnover (mn BDT) | Quantity | Trade |
|-------------------------------|---------------|---------------|-------------------|----------|------------|
| SEML FBLSL Growth Fund | 9.10 | 9.10 | 0.56 | 62,000 | 1 |
| Shurwid Industries Limited | 21.60 | 21.60 | 2.48 | 115,000 | 2 |
| Singer Bangladesh | 135.00 | 132.30 | 21.96 | 165,580 | 30 |
| SK Trims & Industries Limited | 62.00 | 56.20 | 30.64 | 529,080 | 22 |
| Sonargaon Textiles | 24.30 | 24.30 | 2.43 | 100,000 | 1 |
| Southeast Bank | 10.90 | 10.90 | 0.55 | 50,000 | 1 |
| Square Pharmaceuticals | 178.50 | 178.50 | 3.59 | 20,134 | 2 |
| S. S. Steel Limited | 9.30 | 9.30 | 0.65 | 70,000 | 1 |
| Standard Ceramic | 307.90 | 294.80 | 11.08 | 36,850 | 13 |
| VFS Thread Dyeing Limited | 22.50 | 20.30 | 16.81 | 794,800 | 9 |
| Total | | | 384.82 | | 192 |

Corporate Actions: Upcoming Record Dates

| DSE Ticker | Company Name | Rights | Stock | Cash | Year End | Record Date |
|------------|---------------------|--------|-------|-------|-----------|-------------|
| CITYBANK | The City Bank Ltd. | | 0.0% | 15.0% | 31-Dec-19 | 13-Jul-20 |
| DHAKABANK | Dhaka Bank Limited | | 5.0% | 5.0% | 31-Dec-19 | 14-Jul-20 |
| LANKABAFIN | LankaBangla Finance | | 5.0% | 7.0% | 31-Dec-19 | 16-Jul-20 |
| ONEBANKLTD | One Bank | | 5.0% | 5.0% | 31-Dec-19 | 16-Jul-20 |

Important DSE News

NCCBANK

The Board of Directors has recommended 15% cash and 2% stock dividend for the year ended on December 31, 2019. Date of AGM: 28.09.2020, Time: 11:00 AM, Venue: Kurmitola Golf Club, Dhaka Cantonment, Dhaka. Record Date: 10.08.2020. The Company has also reported Consolidated EPS of Tk. 2.30, Consolidated NAV per share of Tk. 21.02 and Consolidated NOCFPS of Tk. 4.60 for the year ended on December 31, 2019 as against Tk. 1.97, Tk. 19.19 and Tk. 5.44 respectively for the same period of the previous year.

DSSL

(Q3 Un-audited): EPS was Tk. 0.37 for January-March 2020 as against Tk. 0.35 for January-March 2019; EPS was Tk. 0.89 for July 2019-March 2020 as against Tk. 1.64 for July 2018-March 2019. NOCFPS was Tk. 0.24 for July 2019-March 2020 as against Tk. 0.61 for July 2018-March 2019. NAV per share was Tk. 18.56 as on March 31, 2020 and Tk. 19.53 as on June 30, 2019.

AAMRANET

The Company has informed that the Board of Directors has decided to Issuance of Non-Convertible Zero Coupon Bond amounting to Tk. 1.00 Billion (at Face value) through private placement, subject to the approval of the regulatory authorities, under the following key features: Issuance Type: Non-Convertible Zero Coupon Bond, Issue Size: Up to Tk. 1.00 Billion (at Face Value), Denomination: Tk. 1000.00 each, Tenure: 5 Years. The aforesaid decision has been taken in conformity of the Bangladesh Securities and Exchange Commission (Private Placement of Debt Securities) Rules 2012 and subsequent amendment has made thereof.

BERGERPBL

The Company has informed that the Company is planning to introduce Berger Expert Sanitization Service where eco-friendly sanitizing agents, smart tools and trained applicators will be used to

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ensure a clean and germ-free environment for offices, commercial spaces, residences and government buildings. The service is expected to be launched from the fourth week of July 2020. Objectives of Berger Expert Sanitization Service are: i) To provide sanitization service to all interested parties as a part of business diversification. ii) To provide sanitization service to the dealers to ensure safe environment in their shops. iii) To facilitate trained painters to earn extra money through this sanitization service. iv) To offer sanitization service to the end customers to ensure safe environment while taking express painting service. Expected annual revenue generation is BDT 1-1.5 crore with a margin of 30%.

REGENTEX

With reference to their earlier news disseminated by DSE on 02.07.2019, the Company has further informed that the Board of Directors has decided to hold an EGM to pass Special Resolution to revise and extension of IPO proceeds utilization and implementation time schedule by the shareholders' of the Company in EGM. Date of EGM: 27.08.2020, Time: 11:00 AM, Venue: Digital Platform as per BSEC order. Record Date for EGM: 04.08.2020.