

## Daily Market Update

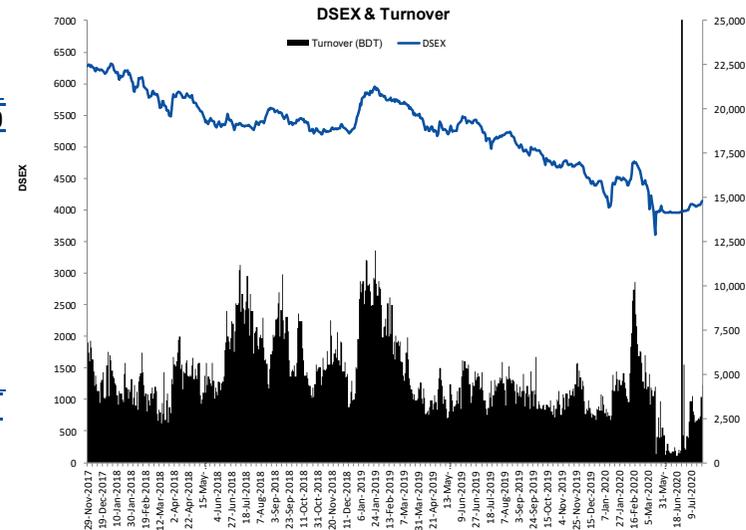
The market closed in green today. The benchmark index DSEX (+0.39%) gained 16.31 points and closed at 4,145 points. The blue-chip index DS30 (+0.23%), the Shariah-based index DSES (+0.21%), and large cap index CDSET (+0.32%) all closed in green. The large cap sectors posted positive performance today except Food & Allied (-2.12%) and Telecommunication (-1.01%). Power booked the highest gain of 0.85% followed by NBFIs (+0.45%), Pharmaceuticals (+0.41%), Banks (+0.39%), and Engineering (+0.11%). Turnover stood at BDT 4.4 billion (USD 51.5 million). Block trade contributed 12.7% of the overall market turnover. Khulna Power Company Limited (+2.9%) was the most traded share with a turnover of BDT 165.2 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                  | 1,142.41  | 1,137.93  | 4.48    | 0.39%  | 30         | 465,646.5              | 17.45%          | 131.2                      | 3.44%               |
| NBFIs                  | 1,400.22  | 1,393.98  | 6.24    | 0.45%  | 23         | 129,449.4              | 4.85%           | 29.1                       | 0.76%               |
| Mutual Funds           | 571.98    | 573.85    | -1.87   | -0.33% | 37         | 29,724.9               | 1.11%           | 58.2                       | 1.52%               |
| General Insurance      | 1,950.71  | 1,871.22  | 79.49   | 4.25%  | 35         | 52,704.6               | 1.98%           | 777.3                      | 20.38%              |
| Life Insurance         | 1,931.00  | 1,879.90  | 51.10   | 2.72%  | 12         | 53,839.0               | 2.02%           | 103.1                      | 2.70%               |
| Telecommunication      | 3,583.38  | 3,619.81  | -36.43  | -1.01% | 2          | 360,154.3              | 13.50%          | 230.8                      | 6.05%               |
| Pharmaceuticals        | 2,594.18  | 2,583.68  | 10.50   | 0.41%  | 32         | 489,003.2              | 18.33%          | 841.3                      | 22.06%              |
| Fuel & Power           | 1,473.02  | 1,460.55  | 12.46   | 0.85%  | 19         | 365,158.5              | 13.69%          | 417.7                      | 10.95%              |
| Cement                 | 1,183.35  | 1,182.07  | 1.28    | 0.11%  | 7          | 71,965.9               | 2.70%           | 39.7                       | 1.04%               |
| Services & Real Estate | 957.80    | 957.57    | 0.23    | 0.02%  | 8          | 38,240.0               | 1.43%           | 14.0                       | 0.37%               |
| Engineering            | 2,043.01  | 2,040.84  | 2.16    | 0.11%  | 39         | 132,568.1              | 4.97%           | 272.6                      | 7.15%               |
| Food & Allied          | 11,527.70 | 11,777.06 | -249.36 | -2.12% | 17         | 212,877.6              | 7.98%           | 263.2                      | 6.90%               |
| IT                     | 1,889.66  | 1,909.28  | -19.62  | -1.03% | 9          | 20,892.5               | 0.78%           | 165.3                      | 4.33%               |
| Textiles               | 967.38    | 965.43    | 1.95    | 0.20%  | 56         | 97,640.2               | 3.66%           | 207.1                      | 5.43%               |
| Paper & Printing       | 5,328.53  | 5,221.29  | 107.25  | 2.05%  | 4          | 14,589.2               | 0.55%           | 42.1                       | 1.10%               |
| Tannery                | 1,668.40  | 1,667.41  | 1.00    | 0.06%  | 6          | 17,861.4               | 0.67%           | 3.6                        | 0.09%               |
| Jute                   | 7,948.40  | 7,959.27  | -10.86  | -0.14% | 3          | 1,756.6                | 0.07%           | 3.5                        | 0.09%               |
| Ceramics               | 392.14    | 393.13    | -0.99   | -0.25% | 5          | 19,883.0               | 0.75%           | 47.2                       | 1.24%               |
| Miscellaneous          | 1,695.75  | 1,682.15  | 13.60   | 0.81%  | 13         | 94,091.9               | 3.53%           | 167.1                      | 4.38%               |

| Top Ten Gainers                     | Close  | Δ%    | Turnover (mn BDT) |
|-------------------------------------|--------|-------|-------------------|
| Agrani Insurance Co. Ltd.           | 27.50  | 10.0% | 42.0              |
| Dhaka Insurance Limited             | 39.60  | 10.0% | 68.2              |
| Eastern Insurance                   | 57.30  | 10.0% | 67.9              |
| Pragati Insurance                   | 45.00  | 9.2%  | 29.3              |
| Phoenix Insurance                   | 29.00  | 9.0%  | 18.2              |
| Sonali Paper & Board Mills Ltd.     | 296.80 | 8.7%  | 9.1               |
| Shaympur Sugar                      | 33.50  | 8.4%  | .7                |
| Padma Islami Life Insurance Limited | 15.50  | 8.4%  | .7                |
| Argon Denims Limited                | 21.50  | 8.0%  | 22.9              |
| Asia Insurance Limited              | 25.30  | 7.2%  | 28.5              |

| Top Ten Losers                                      | Close    | Δ%    | Turnover (mn BDT) |
|---|----------|-------|-------------------|
| Dacca Dyeing  | 4.10     | -6.8% | .2                |
| Tung Hai Knitting & Dyeing Limited                  | 1.90     | -5.0% | .1                |
| Metro Spinning                                      | 8.80     | -4.3% | 3.3               |
| Simtex Industries Limited                           | 14.60    | -3.9% | 23.5              |
| Phoenix Finance 1st Mutual Fund                     | 8.00     | -3.6% | 9.8               |
| Saiham Textile                                      | 24.50    | -3.2% | 43.6              |
| Miracle Ind.  | 19.00    | -3.1% | 12.1              |
| British American Tobacco Bangladesh Company Limited | 915.00   | -2.8% | 118.4             |
| CAPM IBBL Islamic Mutual Fund                       | 7.20     | -2.7% | 2.2               |
| Glaxo Smithkline                                    | 2,152.30 | -2.6% | 21.2              |

| Most Traded Share                                   | Close  | Δ%    | Turnover (mn BDT) |
|---|--------|-------|-------------------|
| Khulna Power Company Limited                        | 46.60  | 2.9%  | 165.2             |
| Beximco Pharmaceuticals                             | 78.40  | 1.8%  | 154.5             |
| Square Pharmaceuticals                              | 180.40 | -0.2% | 141.9             |
| Pioneer Insurance                                   | 45.60  | 3.6%  | 121.3             |
| British American Tobacco Bangladesh Company Limited | 915.00 | -2.8% | 118.4             |
| Grameenphone Ltd.                                   | 254.90 | -1.2% | 116.2             |
| Bangladesh Submarine Cable Company Limited          | 96.80  | 4.3%  | 114.6             |
| Beacon Pharmaceuticals Limited                      | 75.20  | 0.3%  | 106.8             |
| Sonar Bangla Ins                                    | 42.10  | 5.8%  | 89.6              |
| Nahee Aluminium Composite Panel Ltd.                | 55.00  | -2.0% | 85.2              |



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| Index | Closing  | Opening  | Δ(Pts) | Δ%    | %ΔYTD  |
|-------|----------|----------|--------|-------|--------|
| DSEX  | 4,145.38 | 4,129.08 | 16.31  | 0.39% | -6.91% |
| DS30  | 1,400.88 | 1,397.68 | 3.20   | 0.23% | -7.43% |
| DSES  | 965.95   | 963.95   | 2.00   | 0.21% | -3.39% |
| CDSET | 821.84   | 819.23   | 2.61   | 0.32% | -8.66% |

|                     | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category        | 117      | 69       | 160       | 346   |
| A Category (Equity) | 89       | 52       | 110       | 251   |
| B Category (Equity) | 11       | 12       | 22        | 45    |
| N Category (Equity) | 0        | 1        | 0         | 1     |
| Z Category (Equity) | 17       | 4        | 28        | 49    |
| Mutual Funds        | 1        | 10       | 24        | 35    |
| Corporate Bonds     | 0        | 0        | 2         | 2     |

| Market Stat |           | Today       | Last Day    | % Change |
|-------------|-----------|-------------|-------------|----------|
| Mcap        | Mn BDT    | 3,220,895.5 | 3,217,606.8 |          |
|             | Mn USD    | 37,910.7    | 37,872.0    | 0.1%     |
| Turnover    | Mn BDT    | 4,371.8     | 3,715.5     | 17.7%    |
|             | Mn USD    | 51.5        | 43.7        |          |
| Volume      | Mn Shares | 132.6       | 100.7       | 31.7%    |
| Trade       |           | 93,273      | 79,599      | 17.2%    |

| Top Ten Market Cap                                  | Mcap (bn BDT) | % of Total Mcap | Turnover (mn BDT) | PE    | PB    |
|---|---------------|-----------------|-------------------|-------|-------|
| Grameenphone Ltd.                                   | 344.2         | 12.9%           | 116.18            | 10.1x | 8.1x  |
| British American Tobacco Bangladesh Company Limited | 164.7         | 6.2%            | 118.40            | 19.0x | 6.8x  |
| Square Pharmaceuticals                              | 152.3         | 5.7%            | 141.93            | 11.1x | 2.3x  |
| United Power Generation & Distribution Company Ltd  | 116.0         | 4.4%            | 31.56             | 16.2x | 7.9x  |
| Renata Ltd.   | 96.9          | 3.6%            | 17.82             | 22.6x | 5.3x  |
| Berger Paints                                       | 61.1          | 2.3%            | 6.04              | 25.2x | 9.1x  |
| Investment Corporation of Bangladesh                | 55.0          | 2.1%            | 7.73              | NM    | 2.6x  |
| Marico Bangladesh Limited                           | 52.1          | 2.0%            | 9.97              | 18.6x | 35.4x |
| BRAC Bank   | 42.3          | 1.6%            | 3.87              | 9.4x  | 0.9x  |
| LafargeHolcim Bangladesh Limited                    | 41.7          | 1.6%            | 1.02              | 23.2x | 2.7x  |

| Top Ten Free Float Mcap                             | Free Float Mcap (bn BDT) | % of Total Free Float | Turnover (mn BDT) | PE    | PB   |
|---|--------------------------|-----------------------|-------------------|-------|------|
| Square Pharmaceuticals                              | 99.7                     | 9.2%                  | 141.93            | 11.1x | 2.3x |
| Renata Ltd.   | 47.3                     | 4.4%                  | 17.82             | 22.6x | 5.3x |
| British American Tobacco Bangladesh Company Limited | 43.6                     | 4.0%                  | 118.40            | 19.0x | 6.8x |
| Grameenphone Ltd.                                   | 34.4                     | 3.2%                  | 116.18            | 10.1x | 8.1x |
| Beximco Pharmaceuticals                             | 27.6                     | 2.6%                  | 154.53            | 9.3x  | 1.1x |
| Olympic Industries                                  | 23.6                     | 2.2%                  | 9.34              | 16.2x | 5.2x |
| BRAC Bank   | 23.6                     | 2.2%                  | 3.87              | 9.4x  | 0.9x |
| Eastern Bank  | 17.2                     | 1.6%                  | 3.40              | 6.3x  | 0.9x |
| Islami Bank   | 15.4                     | 1.4%                  | 4.68              | 5.5x  | 0.5x |
| Pubali Bank   | 15.2                     | 1.4%                  | .46               | 9.8x  | 0.7x |

| Block Trade   | Maximum Price | Minimum Price | Turnover (mn BDT) | Quantity  | Trade |
|---|---------------|---------------|-------------------|-----------|-------|
| Al-Arafah Islami Bank Ltd                           | 14.70         | 14.70         | 73.50             | 5,000,000 | 1     |
| Apex Foods Limited                                  | 118.00        | 118.00        | 0.50              | 4,240     | 1     |
| Apex Spinning & Knitting Mills Limited              | 117.70        | 117.70        | 0.50              | 4,250     | 1     |
| British American Tobacco Bangladesh Company Limited | 907.60        | 907.60        | 35.45             | 39,055    | 6     |
| BRAC Bank   | 31.90         | 28.80         | 100.69            | 3,490,777 | 15    |
| Beximco Pharmaceuticals                             | 76.80         | 76.80         | 30.72             | 400,000   | 1     |
| City Bank   | 16.70         | 16.70         | 77.18             | 4,621,500 | 4     |
| Confidence Cement                                   | 95.90         | 95.90         | 0.96              | 10,000    | 1     |
| Delta Brac Housing                                  | 83.40         | 83.40         | 0.54              | 6,500     | 1     |
| Dhaka Bank  | 12.20         | 12.20         | 0.79              | 65,000    | 1     |
| Dutch-Bangla Bank                                   | 51.30         | 51.30         | 1.03              | 20,000    | 2     |
| Eastern Insurance                                   | 55.00         | 52.00         | 23.98             | 460,500   | 2     |
| EXIM Bank   | 9.40          | 9.40          | 22.25             | 2,367,194 | 1     |
| First Security Bank                                 | 8.20          | 8.20          | 0.82              | 100,000   | 1     |
| Fortune Shoes Limited                               | 14.40         | 14.40         | 0.50              | 35,000    | 1     |
| Grameenphone Ltd.                                   | 272.00        | 271.00        | 8.41              | 31,000    | 2     |
| ICB Employees Provident MF 1 Scheme 1               | 6.40          | 6.40          | 0.64              | 100,000   | 1     |
| IFIC Bank   | 9.30          | 8.00          | 7.93              | 975,000   | 2     |
| KDS Accessories Limited                             | 41.70         | 41.70         | 1.24              | 29,732    | 1     |
| Khulna Printing & Packaging Limited                 | 17.60         | 17.40         | 1.64              | 94,000    | 2     |
| Midas Financing Ltd.                                | 11.10         | 11.10         | 30.62             | 2,758,412 | 1     |
| National Polymer                                    | 62.00         | 62.00         | 0.69              | 11,150    | 1     |
| Oimex Electrode Limited                             | 24.30         | 24.10         | 1.38              | 57,000    | 2     |
| Paramount Insurance                                 | 70.10         | 70.10         | 1.40              | 20,000    | 1     |
| Phoenix Finance                                     | 23.70         | 23.70         | 1.68              | 70,875    | 1     |
| The Premier Bank                                    | 9.00          | 9.00          | 0.50              | 55,556    | 1     |
| Quasem Industries Limited                           | 31.60         | 31.60         | 2.53              | 80,000    | 1     |

| Block Trade                          | Maximum Price | Minimum Price | Turnover (mn BDT) | Quantity  | Trade     |
|--------------------------------------|---------------|---------------|-------------------|-----------|-----------|
| Sea Pearl Beach Resort & Spa Limited | 79.00         | 77.00         | 3.99              | 51,300    | 5         |
| Shahjalal Islami Bank                | 19.80         | 19.80         | 71.23             | 3,597,679 | 2         |
| Singer Bangladesh                    | 134.90        | 132.30        | 16.98             | 127,800   | 23        |
| SK Trims & Industries Limited        | 56.00         | 56.00         | 2.74              | 49,000    | 5         |
| Uttara Bank                          | 21.50         | 21.50         | 0.54              | 25,000    | 1         |
| VFS Thread Dyeing Limited            | 22.50         | 20.30         | 33.08             | 1,485,500 | 8         |
| <b>Total</b>                         |               |               | <b>556.63</b>     |           | <b>99</b> |

### Corporate Actions: Upcoming Record Dates

| DSE Ticker | Company Name                                  | Rights | Stock | Cash  | Year End  | Record Date |
|------------|---|--------|-------|-------|-----------|-------------|
| SOUTHEASTB | Southeast Bank Ltd.                           |        | 2.5%  | 7.5%  | 31-Dec-19 | 28-Jul-20   |
| TAKAFULINS | Takaful Islami Insurance Limited              |        | 0.0%  | 10.0% | 31-Dec-19 | 29-Jul-20   |
| BNICL      | Bangladesh National Insurance Company Limited |        | 0.0%  | 12.0% | 31-Dec-19 | 29-Jul-20   |
| PEOPLESINS | Peoples Insurance Company Ltd.                |        | 0.0%  | 8.0%  | 31-Dec-19 | 29-Jul-20   |
| ALARABANK  | Al-Arafah Islami Bank Ltd                     |        | 0.0%  | 13.0% | 31-Dec-19 | 30-Jul-20   |
| PHENIXINS  | Phoenix Insurance Company Ltd.                |        | 0.0%  | 12.0% | 31-Dec-19 | 30-Jul-20   |

### Important DSE News

#### PRIMEBANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.06 for April-June 2020 as against Tk. 0.53 for April-June, 2019; Consolidated EPS was Tk. 0.48 for January-June 2020 as against Tk. 0.90 for January-June 2019. Consolidated NOCFPS was Tk. 0.78 for January-June 2020 as against Tk. 1.31 for January-June 2019. Consolidated NAV per share was Tk. 23.88 as on June 30, 2020 and Tk. 22.82 as on June 30, 2019.

#### CITYBANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.30 for April-June, 2020 as against Tk. 1.06 for April-June, 2019; Consolidated EPS was Tk. 1.05 for January-June, 2020 as against Tk. 1.82 for January-June, 2019. Consolidated NOCFPS was Tk. (3.65) for January-June, 2020 as against Tk. (5.86) for January-June, 2019. Consolidated NAV per share was Tk. 24.67 as on June 30, 2020 and Tk. 24.14 as on December 31, 2019.

#### SIBL

(Q2 Un-audited): Consolidated EPS was Tk. 0.11 for April-June 2020 as against Tk. 0.10 for April-June 2019; Consolidated EPS was Tk. 0.50 for January-June 2020 as against Tk. 0.39 for January-June 2019. Consolidated NOCFPS was Tk. (2.52) for January-June 2020 as against Tk. 3.28 for January-June 2019. Consolidated NAV per share was Tk. 19.88 as on June 30, 2020 and Tk. 18.06 as on June 30, 2019. The Company also informed NOCPS decreased due to increase of investment outflow and distribution of profit on deposit amount.

#### RECKITTBN

(Q2 Un-audited): EPS was Tk. 33.47 for April-June, 2020 as against Tk. 21.82 for April-June, 2019; EPS was Tk. 57.51 for January-June, 2020 as against Tk. 37.28 for January-June, 2019.

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NOCFPS was Tk. 211.98 for January-June, 2020 as against 72.22 for January-June, 2019. NAV per share was Tk. 200.15 as on June 30, 2020 and Tk. 142.64 as on December 31, 2019. It is to be noted that EPS increased due to strong revenue growth driven by increased demand of personal hygiene products during pandemic.

**PEOPLESINS**

(Q2 Un-audited): EPS was Tk. 0.38 for April-June 2020 as against Tk. 0.40 for April-June, 2019; EPS was Tk. 0.81 for January-June 2020 as against Tk. 0.85 for January-June, 2019. NOCFPS was Tk. 0.88 for January-June 2020 as against Tk. (0.24) for January-June 2019. NAV per share was Tk. 27.95 as on June 30, 2020 and Tk. 26.72 as on June 30, 2019.

**RELIANCINS**

(Q2 Un-audited): EPS was Tk. 1.27 for April-June 2020 as against Tk. 1.68 for April-June 2019; EPS was Tk. 2.49 for January-June 2020 as against Tk. 2.69 for January-June 2019. NOCFPS was Tk. 4.56 for January-June 2020 as against Tk. 4.06 for January-June 2019. NAV per share was Tk. 51.12 as on June 30, 2020 and Tk. 52.60 as on December 31, 2019.

**POPULARLIF**

(Q1 Un-audited): Increase in life revenue account for Jan- March, 2020 was Tk. 151.09 million with total life insurance fund of Tk. 16,948.63 million as against decrease in life revenue account of Tk. 457.17 million with total life insurance fund of Tk. 17,871.49 million respectively for the same period of the previous year.

(Q2 Un-audited): Decrease in life revenue account for Apr-June 2020 was Tk. 489.09 million with total life insurance fund of Tk. 16,459.54 million as against increase in Tk. 28.72 million and Tk. 17,900.22 million respectively for the same period of the previous year. Decrease in life revenue account for Jan-June 2020 was Tk. 337.99 million with total life insurance fund of Tk. 16,610.63 million as against decrease Tk. 428.45 million and Tk. 17,443.04 ml respectively for same period of previous year.

Mr. Mohammed Zahirul Islam, one of the Directors of the Company, has expressed his intention to buy 5 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

**ANWARGALV**

(Q3 Un-audited): EPS was Tk. 0.64 for January-March 2020 as against Tk. 0.56 for January-March 2019; EPS was Tk. 1.50 for July 2019-March 2020 as against Tk. 0.97 for July 2018-March 2019. NOCFPS was Tk. 1.84 for July 2019-March 2020 as against Tk. 1.01 for July 2018-March 2019. NAV per share was Tk. 10.32 as on March 31, 2020 and Tk. 9.84 as on June 30, 2019.

**NORTHRNINS**

The Company has informed that the Board of Directors has elected Mr. S.M. Ayub Ali Chowdhury as the Chairman of the Company.

**SAIHAMCOT**

Mr. Syed Md. Faisal, one of the Sponsor Directors of the Company, has expressed his intention to transfer 60,00,000 shares out of his total holding of 1,83,87,500 shares to his son Mr. Syed Shafqat Ahmed, another Sponsor Directors of the Company, 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.