

## Daily Market Update

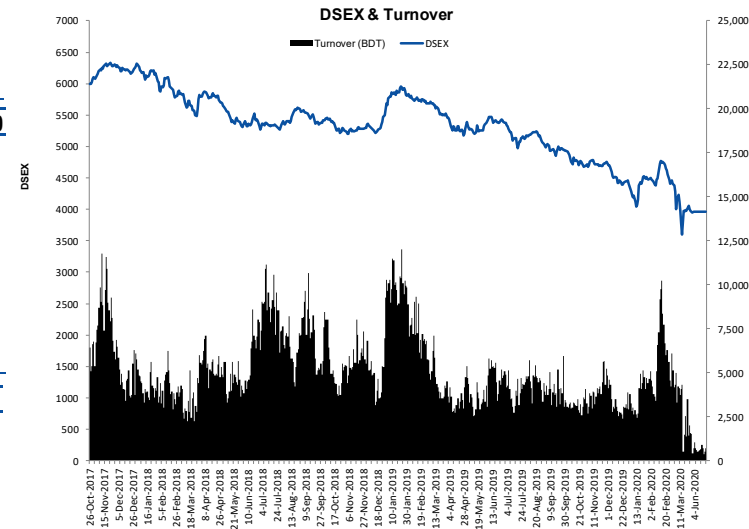
Market closed in green today. The benchmark index DSEX (+0.03%) gained 1.30 points and closed at 3,963.35 points. The blue chip index DS30 (-0.03%) and the Shariah-based index DSES (-0.06%) closed in red while the large cap index CDSET (+0.01%) closed in green. Large cap sectors showed mixed performance today. Banks booked the highest gain of 0.15% followed by Engineering (+0.06%) and Telecommunication (+0.02%). Pharmaceuticals experienced the highest loss of 0.14% followed by Food & Allied (-0.03%) while NBFIs remained unchanged (0.00%). Turnover stood at BDT 0.7 billion (USD 8.5 million). Block trades contributed 25.5% of the overall market turnover today. Beximco Pharmaceuticals (-0.3%) was the most traded share with a turnover of BDT 90.3 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,091.42	1,089.76	1.66	0.15%	30	444,863.6	17.48%	76.5	14.27%
NBFIs	1,360.50	1,360.50	0.00	0.00%	23	125,777.9	4.94%	1.7	0.32%
Mutual Funds	567.89	568.50	-0.61	-0.11%	37	29,512.5	1.16%	14.4	2.68%
General Insurance	1,537.83	1,539.22	-1.39	-0.09%	35	41,549.4	1.63%	8.4	1.56%
Life Insurance	1,772.73	1,770.78	1.95	0.11%	12	49,426.2	1.94%	2.2	0.42%
Telecommunication	3,336.89	3,336.23	0.66	0.02%	2	335,380.2	13.18%	45.7	8.52%
Pharmaceuticals	2,432.12	2,435.63	-3.51	-0.14%	32	458,455.0	18.02%	247.4	46.14%
Fuel & Power	1,426.57	1,426.16	0.41	0.03%	19	353,644.8	13.90%	45.8	8.54%
Cement	1,182.07	1,182.07	0.00	0.00%	7	71,888.0	2.83%	.4	0.08%
Services & Real Estate	949.76	949.76	0.00	0.00%	8	37,919.1	1.49%	.5	0.10%
Engineering	2,022.27	2,021.04	1.24	0.06%	39	131,222.7	5.16%	59.0	11.01%
Food & Allied	11,278.14	11,281.83	-3.69	-0.03%	17	208,269.2	8.19%	12.6	2.35%
IT	1,766.27	1,766.27	0.00	0.00%	9	19,528.3	0.77%	.7	0.13%
Textiles	948.04	947.47	0.57	0.06%	56	95,688.2	3.76%	6.6	1.24%
Paper & Printing	5,034.65	5,034.65	0.00	0.00%	3	9,625.8	0.38%	.1	0.01%
Tannery	1,667.26	1,667.26	0.00	0.00%	6	17,849.2	0.70%	.4	0.08%
Jute	8,020.57	8,220.59	-200.02	-2.43%	3	1,772.6	0.07%	2.9	0.55%
Ceramics	389.73	389.73	0.00	0.00%	5	19,760.8	0.78%	4.4	0.82%
Miscellaneous	1,662.88	1,662.88	0.00	0.00%	13	92,267.9	3.63%	6.3	1.17%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Dacca Dyeing	4.20	7.7%	.5
Appollo Ispat Complex Limited	3.00	7.1%	2.6
Beximco Syntehctics	7.00	6.1%	3.2
Keya Cosmetics	2.60	4.0%	1.2
Tosrifa Industries Limited	10.90	3.8%	.8
Mutual Trust Bank	25.00	3.7%	1.0
Prime Insurance	17.70	3.5%	.0
Power Grid Co. of Bangladesh Ltd.	41.90	1.5%	2.3
Desh Garments	106.50	1.1%	.2
Libra Infusions Limited	496.60	0.7%	.1

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Ambee Pharmaceuticals Ltd.	431.70	-6.1%	4.7
Phoenix Finance 1st Mutual Fund	7.70	-4.9%	10.4
Sonali Aansh	349.10	-4.5%	2.9
BD Welding	14.60	-3.3%	.1
Pharma Aids	385.10	-2.4%	17.5
Shaympur Sugar	23.80	-2.1%	.1
Paramount Insurance	38.10	-2.1%	1.0
National Tea	476.20	-2.0%	2.5
Reckitt Benckiser	3,691.60	-1.9%	15.9
Wata Chemicals Limited	306.80	-1.9%	19.5

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Beximco Pharmaceuticals	63.00	-0.3%	90.3
Bangladesh Submarine Cable Company Limited	78.40	0.5%	39.7
Monno Jute Staffers	794.80	0.0%	34.4
Linde Bangladesh Limited	1,286.90	-0.8%	26.7
Central Pharmaceuticals Limited	12.80	0.0%	20.9
Aziz Pipes Ltd.	97.50	0.0%	19.5
Wata Chemicals Limited	306.80	-1.9%	19.5
EXIM Bank	9.20	0.0%	18.9
Indo-Bangla Pharmaceuticals Limited	19.50	0.0%	18.2
Pharma Aids	385.10	-2.4%	17.5



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	3,963.35	3,962.05	1.30	0.03%	-10.99%
DS30	1,326.36	1,326.71	-0.35	-0.03%	-12.36%
DSES	918.21	918.76	-0.55	-0.06%	-8.16%
CDSET	784.79	784.75	0.04	0.01%	-12.78%

	Advanced	Declined	Unchanged	Total
All Category	15	24	237	276
A Category (Equity)	7	18	175	200
B Category (Equity)	2	2	32	36
N Category (Equity)	0	0	1	1
Z Category (Equity)	6	4	29	39
Mutual Funds	0	2	21	23
Corporate Bonds	1	0	1	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,106,849.3	3,106,500.0	
	Mn USD	36,568.4	36,564.3	0.0%
Turnover	Mn BDT	719.7	512.7	
	Mn USD	8.5	6.0	40.4%
Volume	Mn Shares	24.1	15.3	57.5%
Trade		15,456	15,464	-0.1%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	322.5	12.7%	5.99	9.3x	7.6x
British American Tobacco Bangladesh Company Limited	163.4	6.4%	.93	19.0x	6.7x
Square Pharmaceuticals	145.6	5.7%	10.60	11.0x	2.2x
United Power Generation & Distribution Company Ltd	116.0	4.6%	.24	14.3x	7.9x
Renata Ltd.	90.9	3.6%	10.97	22.5x	5.0x
Berger Paints	60.7	2.4%	2.75	24.9x	9.1x
Investment Corporation of Bangladesh	52.5	2.1%	.02	NM	2.5x
Marico Bangladesh Limited	49.2	1.9%	.44	18.9x	33.4x
BRAC Bank	42.3	1.7%	.02	8.2x	1.0x
LafargeHolcim Bangladesh Limited	41.7	1.6%	.09	23.2x	2.7x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	95.5	9.3%	10.60	11.0x	2.2x
Renata Ltd.	44.4	4.3%	10.97	22.5x	5.0x
British American Tobacco Bangladesh Company Limited	43.2	4.2%	.93	19.0x	6.7x
Grameenphone Ltd.	32.2	3.1%	5.99	9.3x	7.6x
BRAC Bank	23.6	2.3%	.02	8.2x	1.0x
Beximco Pharmaceuticals	22.2	2.2%	90.28	7.8x	0.9x
Olympic Industries	21.7	2.1%	.87	15.0x	4.8x
Eastern Bank	17.2	1.7%	.01	7.6x	1.0x
Pubali Bank	14.9	1.4%	.64	5.7x	0.7x
LafargeHolcim Bangladesh Limited	14.7	1.4%	.09	23.2x	2.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
Apex Tannery Limited	106.90	106.90	10.69	100,000	2
Bank Asia Ltd.	16.20	16.20	69.76	4,306,000	1
City Bank	15.60	15.60	1.15	73,830	1
Dutch-Bangla Bank	57.00	51.50	1.71	31,000	2
Global Insurance Ltd.	14.50	14.50	0.73	50,000	1
Grameenphone Ltd.	233.80	233.80	0.50	2,140	1
MJL Bangladesh Limited	63.70	63.70	0.64	10,100	1
M.L. Dyeing Limited	50.00	50.00	14.70	294,000	3
Meghna Petroleum	142.50	142.50	0.51	3,600	1
The Premier Bank	10.40	10.40	1.04	100,000	1
Shahjalal Islami Bank	20.00	20.00	0.50	25,000	1
Shurwid Industries Limited	21.70	21.70	9.98	460,000	1
Singer Bangladesh	132.30	132.30	3.50	26,460	7
Sinobangla Industries	48.20	48.20	0.50	10,400	1
Square Pharmaceuticals	172.50	157.00	65.20	410,423	32
Standard Ceramic	311.00	311.00	1.56	5,000	1
United Power Generation & Distribution Company Ltd	210.00	210.00	0.63	3,000	1
<b>Total</b>			<b>183.30</b>		<b>58</b>

**Corporate Actions: Upcoming Record Dates**

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
EXIMBANK	Export Import (Exim) Bank of		0.0%	10.0%	31-Dec-19	25-Jun-20
ISLAMICFIN	Islamic Finance		0.0%	10.0%	31-Dec-19	02-Jul-20
SHAHJABANK	Shahjalal Islami Bank		5.0%	5.0%	31-Dec-19	02-Jul-20
PUBALIBANK	Pubali Bank Ltd.		0.0%	10.0%	31-Dec-19	09-Jul-20
BERGERPBL	Berger Paints Bangladesh Ltd.		0.0%	295.0%	31-Dec-19	12-Jul-20
FIRSTBANK	First Security Islami Bank Limited		10.0%	0.0%	31-Dec-19	12-Jul-20
LANKABAFIN	LankaBangla Finance		5.0%	7.0%	31-Dec-19	16-Jul-20
JAMUNABANK	Jamuna Bank		0.0%	15.0%	31-Dec-19	20-Jul-20
TAKAFULINS	Takaful Islami Insurance Limited		0.0%	10.0%	31-Dec-19	29-Jul-20

**Important DSE News**
**EXCH**

DSENEWS: Time extension of subscription for shares of Express Insurance Limited: As per amendment to the consent letter No. BSEC/CI/IPO-268/2017/107 dated June 21, 2020 of Express Insurance Limited, the subscription for shares of Express Insurance Limited has been extended up to July 02, 2020. As such, all respective stakeholders (investors, Stockbrokers/Merchant Bankers etc.) are requested to take their necessary actions, if any, regarding the same. Time extension of electronic subscription of Express Insurance Limited through electronic subscription system under fixed price method: As per amendment to the consent letter No. BSEC/CI/IPO-268/2017/107 dated June 21, 2020 of Express Insurance Limited, the subscription for shares of Express Insurance Limited has been extended up to July 02, 2020. Therefore, the subscription for shares of Express Insurance Limited by the eligible investors through electronic subscription system under fixed price method of the stock exchanges will be continued till 5:30 p.m. of July 02, 2020 (round the clock). Participating EIs will be required to pay full subscription amount (100%) and subscription fee Tk. 3,000.00 (three thousand only) through IFIC Bank Limited (A/C Name: Dhaka Stock Exchange Limited, A/C No.:1090344039042) till 2:00 p.m. of July 02, 2020 (during banking hour). Please visit the following website for subscription related updates <http://www.essbangladesh.com>.

**BNICL**

The Board of Directors has recommended 12% cash dividend for the year ended on December 31, 2019. Date of AGM: 26.08.2020, Time: 12:00 PM, Venue: Digital Platform as per BSEC order. Record Date: 29.07.2020. The Company has also reported EPS of Tk. 2.23, NAV per share of Tk. 19.05 and NOCFPS of Tk. 1.45 for the year ended on December 31, 2019 as against Tk. 2.00, Tk. 18.02 and Tk. 2.68 respectively for the same period of the previous year.

**SPCL**

(Q3 Un-audited): Consolidated EPS was Tk. 1.18 for January-March 2020 as against Tk. 1.47 for January-March 2019; Consolidated EPS was Tk. 3.36 for July 2019-March 2020 as against Tk. 3.47 for July 2018-March 2019. Consolidated NOCFPS was Tk. 3.78 for July 2019-March 2020 as against Tk. 5.74 for July 2018-March 2019. Consolidated NAV per share was Tk. 33.83 as on March 31, 2020 and Tk. 33.22 as on June 30, 2019.

**BXPHERMA**

(Q3 Un-audited): Consolidated EPS was Tk. 2.22 for January-March 2020 as against Tk. 1.84 for January-March 2019; Consolidated EPS was Tk. 6.48 for July 2019-March 2020 as against Tk. 5.51 for July 2018-March 2019. Consolidated NOCFPS was Tk. 9.83 for July 2019-March 2020 as against Tk. 6.48 for July 2018-March 2019. Consolidated NAV per share was Tk. 77.88 as on March 31, 2020 and Tk. 70.99 as on March 31, 2019.

**BEXIMCO**

(Q3 Un-audited): EPS was Tk. 0.12 for January-March 2020 as against Tk. 0.42 for January-March 2019; EPS was Tk. 0.66 for July 2019-March 2020 as against Tk. 1.21 for July 2018-March 2019. NOCFPS was Tk. 22.38 for July 2019-March 2020 as against Tk. (0.64) for July 2018-March 2019. NAV per share was Tk. 69.46 as on March 31, 2020 and Tk. 69.83 as on June 30, 2019. The Company also informed that Net Operating Cash Flow Per Share (NOCPS) for nine months period ended 31 March 2020 is Tk. 22.38 which is higher than the NOCPS of Tk. (0.64) for the corresponding previous period. Realization from debtors & advances and less payment to suppliers and others improved the cash flows during the period and that were used for acquisition of property, plant and equipments, capital work-in-progress & investment property

**EXIMBANK**

(Q1 Un-audited): Consolidated EPS was Tk. 0.04 for January-March 2020 as against Tk. 0.25 for January-March 2019. Consolidated NOCFPS was Tk. (5.02) for January-March 2020 as against Tk. (4.00) for January-March 2019. Consolidated NAV per share was Tk. 20.71 as on March 31, 2020 and Tk. 20.23 as on March 31, 2019. The Company has also informed reasons for significant deviation in EPS and NOCFPS at un-audited Financial statements of the Company for the period ended on March 31, 2020 compared to the previous corresponding period are as under: i) Earnings per Share (EPS) decreased mainly due to decrease in operating income and increase in Provisions for diminution in value of shares. ii) Net operating Cash Flow per share (NOCFPS) decreased mainly due to increase of investments compared to the previous period.

**MONNOCERA**

Referring to their earlier news disseminated by DSE on 31.05.2020 regarding Temporary Shutdown of the factory the Company has further informed that the Company has been decided to resume partial operation of the factory from June 23, 2020 for the greater interest of the economy of the country.

**MONNOSTAF**

Referring to their earlier news disseminated by DSE on 31.05.2020 regarding Temporary Shutdown of the factory the Company has further informed that the Company has been decided to resume partial operation of the factory from June 23, 2020 for the greater interest of the economy of the country.

**CITYBANK**

The Board of Directors has recommended 15% cash dividend for the year ended on December 31, 2019. Date of AGM: 13.08.2020; Time: 2:30 AM; Venue: Through Digital Platform. Record Date: 13.07.2020. The Company has also reported Consolidated EPS of Tk. 2.59, Consolidated NAV per share of Tk. 24.14 and Consolidated NOCFPS of Tk. 13.47 for the year ended on December 31, 2019 as against Tk. 2.19, Tk. 24.52 and Tk. 13.61 respectively for the same period of the previous year.

(Q1 Un-audited): Consolidated EPS was Tk. 0.75 for January-March 2020 as against Tk. 0.75 for January-March 2019. Consolidated NOCFPS was Tk. (9.41) for January-March 2020 as against Tk. (11.01) for January-March 2019. Consolidated NAV per share was Tk. 24.38 as on March 31, 2020 and Tk. 24.14 as on December 31, 2019.

**SPCERAMICS**

(Q3 Un-audited): EPS was Tk. (0.05) for January-March 2020 as against Tk. 0.09 for January-March 2019; EPS was Tk. 0.01 for July 2019-March 2020 as against Tk. 0.30 for July 2018-March 2019. NOCFPS was Tk. 1.23 for July 2019-March 2020 as against Tk. 0.10 for July 2018-March 2019. NAV per share was Tk. 28.88 as on March 31, 2020 and Tk. 28.91 as on March 31, 2019.

**OLYMPIC**

(Q3 Un-audited): EPS was Tk. 2.47 for January-March 2020 as against Tk. 2.37 for January-March 2019; EPS was Tk. 7.73 for July 2019-March 2020 as against Tk. 6.97 for July 2018-March 2019. NOCFPS was Tk. 6.75 for July 2019-March 2020 as against Tk. 6.78 for July 2018-March 2019. NAV per share was Tk. 38.82 as on March 31, 2020 and Tk. 33.70 as on March 31, 2019.

**BXSYNTH**

(Q3 Un-audited): EPS was Tk. (0.65) for January-March 2020 as against Tk. (0.81) for January-March 2019; EPS was Tk. (2.05) for July 2019-March 2020 as against Tk. (2.53) for July 2018-March 2019. NOCFPS was Tk. 1.78 for July 2019-March 2020 as against Tk. 0.09 for July 2018-March 2019. NAV per share was Tk. 12.09 as on March 31, 2020 and Tk. 14.13 as on June 30, 2019.

**COPPERTECH**

(Q3 Un-audited): EPS was Tk. 0.21 for January-March 2020 as against Tk. 0.29 for January-March 2019; EPS was Tk. 0.49 for July 2019-March 2020 as against Tk. 0.62 for July 2018-March 2019. NOCFPS was Tk. 0.46 for July 2019-March 2020 as against Tk. (1.47) for July 2018-March 2019. NAV per share was Tk. 11.59 as on March 31, 2020 and Tk. 12.18 as on June 30, 2019.