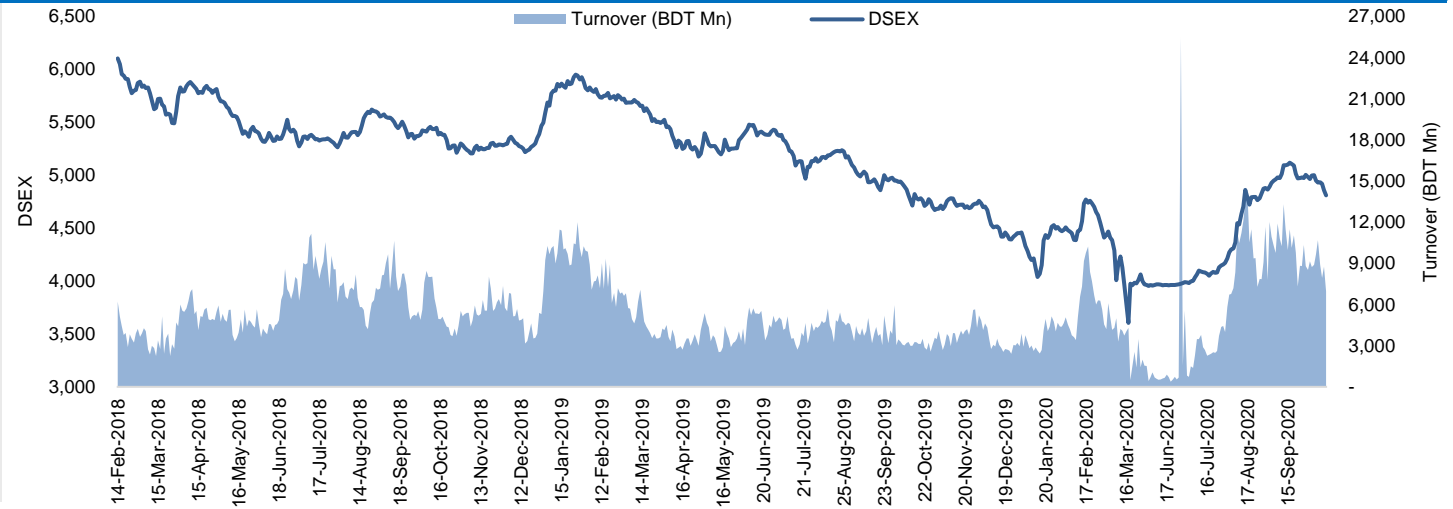


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.00%) lost 48.66 points and closed at 4,809.70. The blue-chip index DS30 (-0.61%), the Shariah-based index DSES (-0.22%), and the large-cap index CDSET (-0.48%) closed at 1,637.49, 1,096.24, and 967.61 points, respectively. All the large-cap sectors posted negative performance today except Food & Allied (+0.02%), and Telecommunication (+0.46%). Engineering experienced the highest loss of 5.10% followed by Bank (-0.97%), NBF1 (-0.79%), Pharmaceutical (-0.50%) and Fuel & Power (-0.21%), respectively. Block trades contributed 2.0% of the overall market turnover. Eastland Insurance Company Ltd. (-6.0%) was the most traded share with a turnover of BDT 230 million.



| Index | Closing  | Opening  | Point Δ | %Δ     | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX  | 4,809.70 | 4,858.36 | -48.66  | -1.00% | +8.0%  |
| DS30  | 1,637.49 | 1,647.60 | -10.10  | -0.61% | +8.2%  |
| DSES  | 1,096.24 | 1,098.64 | -2.39   | -0.22% | +9.6%  |
| CDSET | 967.61   | 972.30   | -4.69   | -0.48% | +7.5%  |

|                     | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category        | 56       | 239      | 60        | 355   |
| A Category (Equity) | 36       | 179      | 44        | 259   |
| B Category (Equity) | 11       | 37       | 8         | 56    |
| N Category (Equity) | 0        | 3        | 0         | 3     |
| Z Category (Equity) | 9        | 20       | 8         | 37    |
| Mutual Funds        | 1        | 36       | 0         | 37    |
| Corporate Bonds     | 1        | 0        | 1         | 2     |

|              | Today     | Last Day  | Daily %Δ  |        |
|--------------|-----------|-----------|-----------|--------|
| Mcap         | Mn BDT    | 3,926,133 | 3,971,430 | -1.1%  |
|              | Mn USD    | 46,212    | 46,745    |        |
| Turnover     | Mn BDT    | 6,945     | 8,751     | -20.6% |
|              | Mn USD    | 82        | 103       |        |
| Volume       | Mn Shares | 314       | 400       | -21.4% |
| No. of Trade |           | 156,753   | 181,853   | -13.8% |

Figure: Sectorial Turnover (BDT Mn)

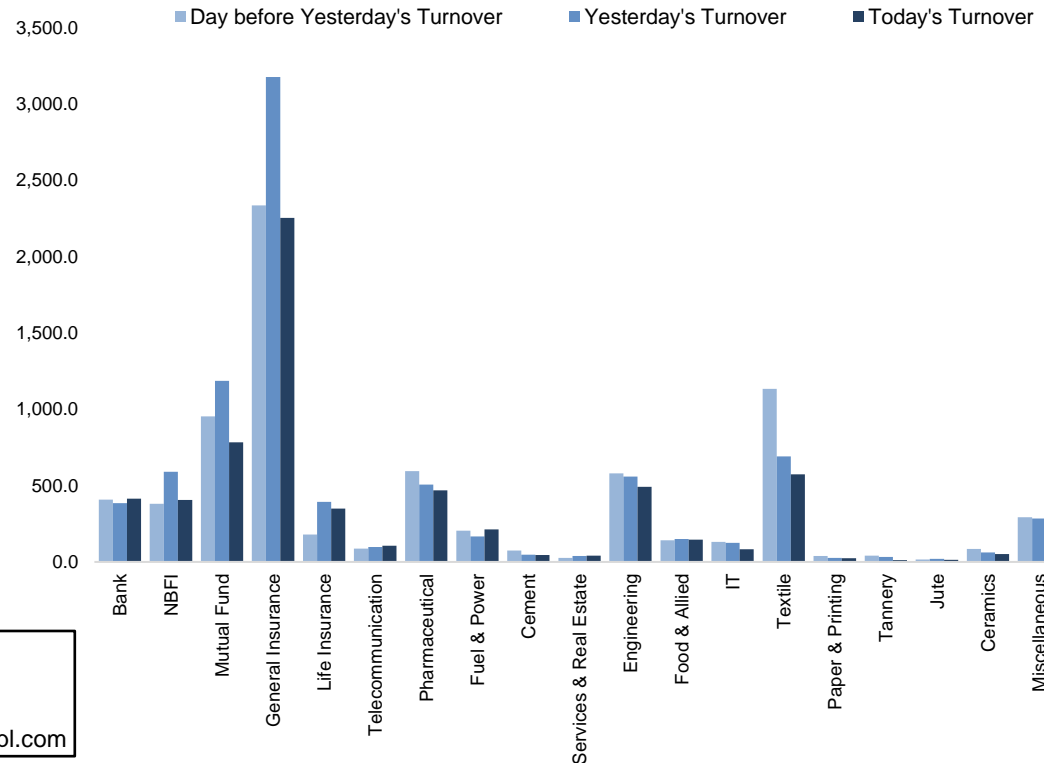
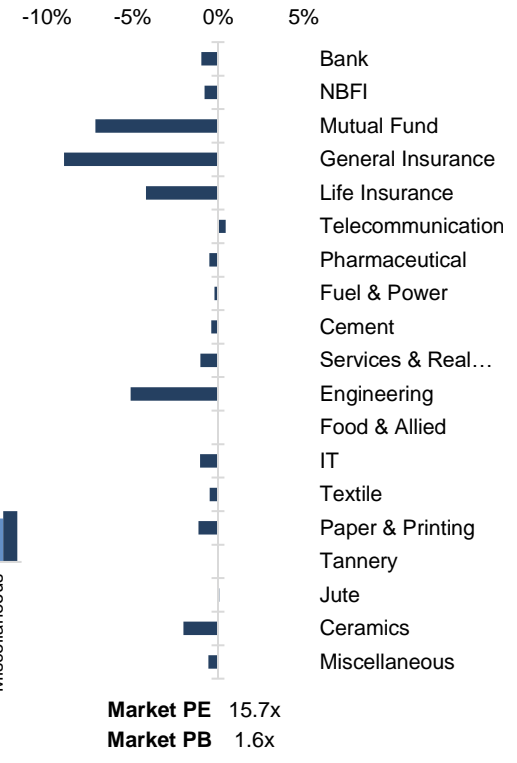


Figure: Sectorial Mcap Change



Market PE 15.7x  
Market PB 1.6x

|   |   |
|---|---|
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|---|---|

| Sector Index           | Closing | Opening | Points Δ | %Δ     | No. of Companies | Mcap (BDT Mn) | % of Total Mcap | Turnover (BDT Mn) | % of Total Turnover | PE     | PB   | Top Twenty Market Cap | Mcap (BDT Mn) | % of Total Mcap | Turnover (BDT Mn) | PE    | PB    |
|------------------------|---------|---------|----------|--------|------------------|---------------|-----------------|-------------------|---------------------|--------|------|-----------------------|---------------|-----------------|-------------------|-------|-------|
| Bank                   | 1,295   | 1,307   | -12.72   | -0.97% | 30               | 535,886       | 15.9%           | 413.5             | 6.1%                | 7.9x   | 0.7x | GP                    | 446,679       | 13.2%           | 77.8              | 13.1x | 8.8x  |
| NBFI                   | 1,901   | 1,916   | -15.06   | -0.79% | 23               | 172,000       | 5.1%            | 406.0             | 6.0%                | NM     | 2.6x | WALTONHIL             | 248,250       | 7.3%            | 129.5             | 17.5x | 3.1x  |
| Mutual Fund            | 804     | 866     | -62.09   | -7.17% | 37               | 41,225        | 1.2%            | 783.9             | 11.5%               | NM     | 0.8x | BATBC                 | 192,582       | 5.7%            | 38.8              | 16.8x | 5.6x  |
| General Insurance      | 3,044   | 3,345   | -300.81  | -8.99% | 36               | 78,121        | 2.3%            | 2,254.3           | 33.1%               | 19.7x  | 1.6x | SQRPHARM              | 173,491       | 5.1%            | 84.8              | 12.6x | 2.4x  |
| Life Insurance         | 2,012   | 2,100   | -88.45   | -4.21% | 12               | 54,679        | 1.6%            | 348.5             | 5.1%                | NM     | NM   | UPGDCL                | 152,354       | 4.5%            | 71.0              | 21.2x | 5.4x  |
| Telecommunication      | 4,600   | 4,579   | +20.87   | +0.46% | 2                | 466,583       | 13.8%           | 105.9             | 1.6%                | 13.4x  | 8.1x | RENATA                | 101,789       | 3.0%            | 16.4              | 23.8x | 5.2x  |
| Pharmaceutical         | 2,905   | 2,919   | -14.66   | -0.50% | 32               | 549,870       | 16.3%           | 468.7             | 6.9%                | 18.3x  | 2.4x | ICB                   | 72,830        | 2.2%            | 5.3               | NM    | 3.8x  |
| Fuel & Power           | 1,708   | 1,711   | -3.57    | -0.21% | 19               | 421,825       | 12.5%           | 212.5             | 3.1%                | 11.6x  | 1.3x | MARICO                | 65,712        | 1.9%            | 6.1               | 24.8x | 47.4x |
| Cement                 | 1,247   | 1,252   | -4.97    | -0.40% | 7                | 76,956        | 2.3%            | 44.7              | 0.7%                | 31.7x  | 1.9x | BERGERPBL             | 62,105        | 1.8%            | 24.7              | 30.8x | 6.5x  |
| Services & Real Estate | 1,010   | 1,021   | -10.44   | -1.02% | 9                | 40,202        | 1.2%            | 40.6              | 0.6%                | 22.3x  | 0.8x | BRACBANK              | 48,660        | 1.4%            | 165.1             | 13.5x | 1.1x  |
| Engineering            | 3,487   | 3,675   | -187.43  | -5.10% | 40               | 396,068       | 11.7%           | 493.0             | 7.2%                | 17.3x  | 1.7x | LHBL                  | 45,294        | 1.3%            | 18.5              | 25.2x | 2.8x  |
| Food & Allied          | 12,919  | 12,917  | +2.08    | +0.02% | 17               | 243,430       | 7.2%            | 146.7             | 2.2%                | 18.8x  | 5.7x | BXPHERMA              | 44,652        | 1.3%            | 154.2             | 13.0x | 1.5x  |
| IT                     | 2,048   | 2,070   | -21.83   | -1.05% | 10               | 23,056        | 0.7%            | 83.7              | 1.2%                | 20.0x  | 2.2x | SUMITPOWER            | 42,715        | 1.3%            | 25.6              | 7.7x  | 1.3x  |
| Textile                | 1,150   | 1,155   | -5.51    | -0.48% | 56               | 116,108       | 3.4%            | 574.1             | 8.4%                | NM     | 0.8x | ISLAMIBANK            | 42,182        | 1.2%            | 18.6              | 8.0x  | 0.7x  |
| Paper & Printing       | 5,130   | 5,189   | -59.07   | -1.14% | 4                | 14,502        | 0.4%            | 23.9              | 0.4%                | 249.5x | 1.0x | DUTCHBANGL            | 35,805        | 1.1%            | 9.0               | 7.6x  | 1.1x  |
| Tannery                | 1,669   | 1,669   | -0.11    | -0.01% | 6                | 17,999        | 0.5%            | 12.4              | 0.2%                | NM     | 1.7x | OLYMPIC               | 33,230        | 1.0%            | 9.1               | 16.4x | 4.3x  |
| Jute                   | 9,645   | 9,637   | +8.10    | +0.08% | 3                | 2,151         | 0.1%            | 12.9              | 0.2%                | NM     | 8.1x | TITASGAS              | 33,139        | 1.0%            | 10.0              | 8.5x  | 0.5x  |
| Ceramics               | 418     | 427     | -8.58    | -2.01% | 5                | 21,592        | 0.6%            | 51.1              | 0.8%                | 61.0x  | 1.5x | EBL                   | 28,088        | 0.8%            | 1.3               | 7.0x  | 1.0x  |
| Miscellaneous          | 1,898   | 1,909   | -10.85   | -0.57% | 13               | 106,184       | 3.1%            | 332.3             | 4.9%                | 24.6x  | 1.1x | MJLBD                 | 26,892        | 0.8%            | 3.5               | 14.5x | 2.0x  |
|                        |         |         |          |        |                  |               |                 |                   |                     |        |      | GLAXOSMITH            | 25,255        | 0.7%            | 11.0              | 24.4x | 19.9x |

| Top Ten Gainers | Close Price (BDT) | Δ%     | Turnover (BDT Mn) | PE     | PB    |
|-----------------|-------------------|--------|-------------------|--------|-------|
| SHYAMPSUG       | 61.7              | +10.0% | 2.2               | NM     | NM    |
| NFML            | 11.3              | +9.7%  | 66.3              | 137.9x | 0.9x  |
| SAVAREFR        | 310.3             | +8.7%  | 3.7               | NM     | 81.0x |
| BDWELDING       | 21.4              | +6.5%  | 3.3               | NM     | 1.9x  |
| YPL             | 13.9              | +5.3%  | 99.3              | NM     | 1.2x  |
| ENVOYTEX        | 29.8              | +4.9%  | 14.3              | 10.8x  | 0.8x  |
| BDLAMPS         | 120.0             | +4.1%  | 1.4               | NM     | 1.4x  |
| KBPPWBIL        | 8.1               | +3.8%  | 6.3               | 84.3x  | 0.8x  |
| ARAMITCEM       | 17.1              | +3.6%  | 0.1               | NM     | 0.6x  |
| UNIONCAP        | 8.9               | +3.5%  | 13.4              | NM     | 1.7x  |

| Top Twenty Free Float Mcap | Free Float Mcap (BDT Mn) | % of Total Free Float Mcap | PE     | PB   |
|----------------------------|--------------------------|----------------------------|--------|------|
| SQRPHARMA                  | 113,515                  | 9.0%                       | 12.6x  | 2.4x |
| BATBC                      | 50,938                   | 4.0%                       | 16.8x  | 5.6x |
| RENATA                     | 49,693                   | 4.0%                       | 23.8x  | 5.2x |
| GP                         | 44,668                   | 3.6%                       | 13.1x  | 8.8x |
| BXPHERMA                   | 38,762                   | 3.1%                       | 13.0x  | 1.5x |
| BRACBANK                   | 27,108                   | 2.2%                       | 13.5x  | 1.1x |
| OLYMPIC                    | 24,003                   | 1.9%                       | 16.4x  | 4.3x |
| ISLAMIBANK                 | 20,550                   | 1.6%                       | 8.0x   | 0.7x |
| EBL                        | 19,224                   | 1.5%                       | 7.0x   | 1.0x |
| CITYBANK                   | 17,509                   | 1.4%                       | 13.1x  | 1.0x |
| PUBALIBANK                 | 17,260                   | 1.4%                       | 17.8x  | 0.8x |
| BEXIMCO                    | 16,304                   | 1.3%                       | 21.6x  | 0.3x |
| LHBL                       | 15,998                   | 1.3%                       | 25.2x  | 2.8x |
| SUMITPOWER                 | 15,715                   | 1.2%                       | 7.7x   | 1.3x |
| NBL                        | 15,397                   | 1.2%                       | 5.5x   | 0.4x |
| UPGDCL                     | 15,235                   | 1.2%                       | 21.2x  | 5.4x |
| PRIMEBANK                  | 12,020                   | 1.0%                       | 16.6x  | 0.7x |
| BEACONPHAR                 | 10,947                   | 0.9%                       | 136.1x | 5.2x |
| SHAHJABANK                 | 10,925                   | 0.9%                       | 12.3x  | 1.1x |
| SOUTHEASTB                 | 10,824                   | 0.9%                       | 8.0x   | 0.4x |

| Most Traded Share | Close Price (BDT) | Δ%    | Turnover (BDT Mn) | PE    | PB   |
|-------------------|-------------------|-------|-------------------|-------|------|
| EASTLAND          | 34.6              | -6.0% | 230.0             | 27.3x | 1.7x |
| SANDHANINS        | 31.3              | -7.7% | 196.3             | NM    | NM   |
| BEXIMCO           | 23.3              | -2.5% | 183.8             | 21.6x | 0.3x |
| BRACBANK          | 36.7              | -2.9% | 165.1             | 13.5x | 1.1x |
| CONTININS         | 50.4              | -8.5% | 161.4             | 44.6x | 2.4x |
| BXPHERMA          | 110.1             | -2.0% | 154.2             | 13.0x | 1.5x |
| FBFIF             | 6.1               | -9.0% | 138.7             | NM    | 0.7x |
| BDFINANCE         | 24.3              | -6.2% | 130.8             | 12.1x | 1.4x |
| WALTONHIL         | 819.5             | -7.5% | 129.5             | 17.5x | 3.1x |
| RUPALIINS         | 32.3              | -9.8% | 123.3             | 21.2x | 1.5x |

| Top Ten Losers | Close Price (BDT) | Δ%     | Turnover (BDT Mn) | PE    | PB   |
|----------------|-------------------|--------|-------------------|-------|------|
| SONARBAINS     | 45.1              | -10.0% | 71.0              | 16.2x | 2.2x |
| GLOBALINS      | 30.7              | -10.0% | 71.1              | 43.6x | 2.6x |
| ASIAINS        | 44.3              | -10.0% | 53.0              | 26.2x | 2.2x |
| PHENIXINS      | 39.8              | -10.0% | 37.0              | 19.4x | 1.1x |
| NORTHRNINS     | 36.2              | -10.0% | 106.0             | 24.0x | 1.8x |
| EIL            | 33.5              | -9.9%  | 94.3              | 33.7x | 3.0x |
| KARNAPHULI     | 31.7              | -9.9%  | 44.9              | 28.0x | 1.7x |
| NITOLINS       | 53.6              | -9.9%  | 67.7              | 9.2x  | 2.0x |
| SEMLLECMF      | 10.0              | -9.9%  | 38.1              | NM    | 1.1x |
| PROVATIINS     | 41.9              | -9.9%  | 42.9              | 16.5x | 2.1x |

| Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|-------------|---------------------|---------------------|-------------------|-----------------|--------------|
| AMANFEED    | 25                  | 25                  | 0.5               | 20              | 1            |
| ASIAPACINS  | 54.7                | 54.7                | 8.2               | 150             | 2            |
| BATBC       | 1050                | 1050                | 10.5              | 10              | 1            |
| BDFINANCE   | 28.2                | 28.2                | 5.6               | 200             | 1            |
| BGIC        | 37.5                | 37.5                | 0.8               | 20              | 1            |
| BRACBANK    | 37.1                | 36.4                | 64.0              | 1,740           | 21           |
| DBH         | 94.8                | 90                  | 10.1              | 109             | 3            |
| DHAKAINS    | 49.5                | 49.5                | 1.0               | 20              | 1            |
| INTRACO     | 14.4                | 14.4                | 0.6               | 40              | 1            |
| JAMUNABANK  | 16.5                | 16.5                | 0.7               | 45              | 1            |

| Block Trade  | Maximum Price (BDT) | Minimum Price (BDT) | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|--------------|---------------------|---------------------|-------------------|-----------------|--------------|
| METROSPIN    | 8.6                 | 8.6                 | 10.0              | 1,166           | 2            |
| NFML         | 11.2                | 11.2                | 1.1               | 100             | 1            |
| NORTHRNINS   | 40.8                | 40.8                | 0.7               | 17              | 1            |
| PIONEERINS   | 73                  | 72.2                | 1.1               | 16              | 2            |
| SANDHANINS   | 34.9                | 34.9                | 0.7               | 20              | 1            |
| SEAPEARL     | 77.6                | 71.2                | 1.7               | 24              | 3            |
| SHURWID      | 22.9                | 22.9                | 1.0               | 42              | 1            |
| SINGERBD     | 164                 | 164                 | 2.5               | 15              | 1            |
| SKTRIMS      | 62.2                | 56.3                | 13.6              | 232             | 17           |
| WALTONHIL    | 850                 | 850                 | 1.7               | 2               | 2            |
| <b>Total</b> |                     |                     | <b>136.0</b>      |                 | <b>64</b>    |

**Important DSE News**
**SAMATALETH**

(Q3 Un-audited): EPS was Tk. (0.041) for January-March 2020 as against Tk. 0.073 for January-March 2019; EPS was Tk. 0.039 for July 2019-March 2020 as against Tk. 0.080 for July 2018-March 2019. NOCFPS was Tk. 0.40 for July 2019-March 2020 as against Tk. 0.016 for July 2018-March 2019. NAV per share was Tk. 14.36 as on March 31, 2020 and Tk. 14.45 as on March 31, 2019.

**Upcoming Corporate Events**

| DSE Ticker | Right Share | Dividend |       | Event       | Date      |
|------------|-------------|----------|-------|-------------|-----------|
|            |             | Stock    | Cash  |             |           |
| PRIMELIFE  | -           | 0.0%     | 10.0% | Record Date | 14-Oct-20 |
| EIL        | -           | 0.0%     | 0.0%  | Record Date | 20-Oct-20 |
| APEXTANRY  | -           | 0.0%     | 12.0% | Record Date | 21-Oct-20 |
| BARKAPOWER | -           | 0.0%     | 0.0%  | Record Date | 22-Oct-20 |
| PRIMEFIN   | -           | 0.0%     | 2.0%  | Record Date | 22-Oct-20 |
| SINGERBD   | -           | 0.0%     | 0.0%  | Record Date | 22-Oct-20 |

**Upcoming IPOs**

| Company Name          | Event        | Opening Date | Closing Date |
|-----------------------|--------------|--------------|--------------|
| Lub-rref (Bangladesh) | Bidding      | 12-10-20     | 15-10-20     |
| Dominage Steel        | Subscription | 19-10-20     | 25-10-20     |

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