

## Daily Market Update

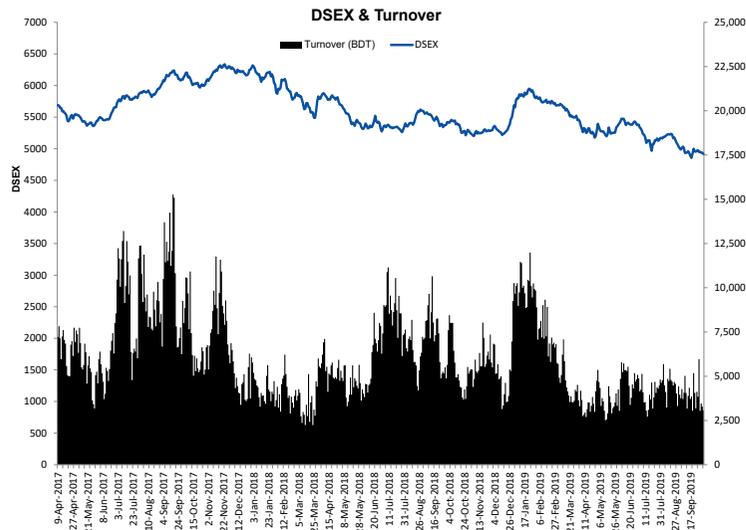
Market closed in red today. The benchmark index DSEX (-0.43%) lost 21.13 points and closed at 4,916.69 points. Both the blue chip index DS30 (-0.43%) and the Shariah based index DSES (-0.20%) closed in red. All the large cap sectors showed negative performance today. Power experienced the highest loss of 1.82% followed by NBFIs (-0.56%), Banks (-0.47%), Engineering (-0.26%), Telecommunication (-0.11%), Food & Allied (-0.09%), and Pharmaceuticals (-0.04%). Turnover stood at BDT 3.1 billion (USD 37.0 million). National Tubes (+10.0%) was the most traded share with a turnover of BDT 257.2 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,355.63	1,362.04	-6.41	-0.47%	30	553,308.1	17.55%	118.3	3.97%
NBFIs	1,675.66	1,685.05	-9.39	-0.56%	23	154,912.3	4.91%	65.6	2.20%
Mutual Funds	644.32	655.98	-11.66	-1.78%	37	33,483.9	1.06%	284.1	9.54%
General Insurance	1,899.55	1,924.84	-25.29	-1.31%	35	51,453.4	1.63%	255.1	8.57%
Life Insurance	2,115.12	2,147.20	-32.08	-1.49%	12	58,972.7	1.87%	25.7	0.86%
Telecommunication	4,834.75	4,840.00	-5.25	-0.11%	2	485,925.6	15.42%	76.1	2.56%
Pharmaceuticals	2,754.09	2,755.08	-0.99	-0.04%	32	519,433.1	16.48%	384.0	12.90%
Fuel & Power	1,737.12	1,769.24	-32.12	-1.82%	20	430,628.9	13.66%	270.5	9.09%
Cement	1,297.64	1,303.87	-6.23	-0.48%	7	78,915.7	2.50%	19.3	0.65%
Services & Real Estate	914.51	912.77	1.73	0.19%	8	35,831.6	1.14%	19.1	0.64%
Engineering	2,775.84	2,783.16	-7.32	-0.26%	39	180,786.5	5.74%	620.4	20.85%
Food & Allied	14,342.30	14,354.72	-12.42	-0.09%	17	263,952.7	8.37%	65.7	2.21%
IT	1,795.54	1,785.70	9.84	0.55%	9	19,851.9	0.63%	101.8	3.42%
Textiles	1,132.32	1,132.33	-0.01	0.00%	55	109,815.3	3.48%	240.8	8.09%
Paper & Printing	6,007.03	5,843.10	163.93	2.81%	3	11,484.9	0.36%	12.6	0.42%
Tannery	2,196.33	2,201.42	-5.09	-0.23%	6	23,650.8	0.75%	60.9	2.05%
Jute	14,907.91	15,451.29	-543.38	-3.52%	3	3,294.7	0.10%	25.0	0.84%
Ceramics	526.70	535.19	-8.49	-1.59%	5	25,439.4	0.81%	161.0	5.41%
Miscellaneous	2,002.80	2,004.81	-2.01	-0.10%	13	111,128.8	3.53%	170.5	5.73%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
National Tubes	190.00	10.0%	257.2
Savar Refractories	115.00	9.9%	.8
Information Services Network Ltd.	35.70	9.8%	8.7
ICB Employees Provident MF 1 Scheme 1	5.70	9.6%	10.4
Meghna Condensed Milk	15.20	9.4%	.3
Alif Industries Limited	44.50	9.1%	33.5
Shurwid Industries Limited	23.70	8.7%	47.6
First Finance Limited	3.80	8.6%	.0
NCCBL Mutual Fund - 1	7.00	7.7%	41.9
Beximco Syntehtics	4.40	7.3%	.2

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
SEML FBLSL Growth Fund	16.50	-9.3%	75.1
Zeal Bangla Sugar Mills	30.20	-8.8%	.0
Asian Tiger Sandhani Life Growth Fund	8.90	-8.2%	24.8
SEML IBBL Shariah Fund	10.20	-8.1%	8.9
CAPM BDBL Mutual Fund 01	9.20	-8.0%	3.0
Dulamia Cotton	42.00	-7.9%	.1
Phoenix Finance 1st Mutual Fund	6.80	-6.8%	9.5
Standard Ceramic	666.90	-5.7%	109.4
Vanguard AML BD Finance Mutual Fund One	6.90	-5.5%	2.2
Tallu Spinning	3.60	-5.3%	.2

Most Traded Share	Close	Δ%	Turnover (mn BDT)
National Tubes	190.00	10.0%	257.2
Beacon Pharmaceuticals Limited	28.10	-2.1%	114.1
Standard Ceramic	666.90	-5.7%	109.4
SEML FBLSL Growth Fund	16.50	-9.3%	75.1
Wata Chemicals Limited	638.90	0.8%	66.7
Bangladesh Submarine Cable Company Limited	120.90	-2.6%	66.4
Monno Jute Staffers	1,557.70	-0.3%	63.3
Summit Power	41.80	0.5%	60.8
Atlas Bangladesh Ltd.	130.00	3.5%	53.2
Sonar Bangla Ins	34.20	-1.4%	48.4



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,916.69	4,937.82	-21.13	-0.43%	-8.71%
DS30	1,747.68	1,755.24	-7.56	-0.43%	-7.08%
DSES	1,134.11	1,136.37	-2.26	-0.20%	-8.01%

	Advanced	Declined	Unchanged	Total
All Category	90	213	51	354
A Category (Equity)	61	173	32	266
B Category (Equity)	6	25	8	39
N Category (Equity)	4	3	2	9
Z Category (Equity)	19	12	9	40
Mutual Funds	7	22	8	37
Corporate Bonds	1	0	0	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,711,726.0	3,727,346.0	
	Mn USD	44,649.7	44,837.6	-0.4%
Turnover	Mn BDT	3,072.2	3,286.4	-6.5%
	Mn USD	37.0	39.5	
Volume	Mn Shares	101.5	126.1	-19.5%
Trade		99,806	107,136	-6.8%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	466.0	14.8%	9.67	12.8x	11.0x
British American Tobacco Bangladesh Company Limited	205.6	6.5%	12.13	25.7x	8.5x
Square Pharmaceuticals	186.0	5.9%	30.25	15.3x	3.0x
United Power Generation & Distribution Company Ltd	146.7	4.7%	45.28	19.8x	10.0x
Renata Ltd.	103.2	3.3%	4.57	29.9x	6.2x
BRAC Bank	76.0	2.4%	7.72	13.7x	2.0x
Berger Paints	70.5	2.2%	1.66	31.8x	10.5x
Investment Corporation of Bangladesh	67.3	2.1%	1.03	42.0x	2.6x
Marico Bangladesh Limited	54.8	1.7%	3.37	23.7x	37.2x
Summit Power	44.6	1.4%	60.85	9.1x	1.7x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	122.0	9.6%	30.25	15.3x	3.0x
British American Tobacco Bangladesh Company Limited	54.4	4.3%	12.13	25.7x	8.5x
Renata Ltd.	50.4	4.0%	4.57	29.9x	6.2x
Grameenphone Ltd.	46.6	3.7%	9.67	12.8x	11.0x
BRAC Bank	42.3	3.3%	7.72	13.7x	2.0x
Olympic Industries	29.3	2.3%	5.33	22.0x	6.4x
Beximco Pharmaceuticals	29.2	2.3%	6.55	11.8x	1.2x
Eastern Bank	27.4	2.2%	.51	8.4x	1.2x
Islami Bank	18.1	1.4%	1.73	5.2x	0.6x
Pubali Bank	17.6	1.4%	.35	6.8x	0.9x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Beacon Pharmaceuticals Limited	27.90	27.90	40.73	1,460,000	4
IDLC Finance Ltd.	48.50	48.50	9.70	200,000	1
JMI Syringes & Medical Devices Ltd	436.00	436.00	0.55	1,250	1
National Tubes	180.00	160.00	1.40	8,125	2
Standard Insurance	31.00	31.00	1.58	51,000	1
Summit Power	38.00	38.00	41.80	1,100,000	1

## Important DSE News

### GENEXIL

The Company has informed that the Board of Directors has approved an agreement with Grameenphone Limited, Dhaka, Bangladesh for the purpose of commercial launching of service to facilitate customers with wide range of handsets, up to date accessories and top-notch products. As per the agreement and strategic collaboration, customers can purchase wide range of the Company provided products handsets in GP centers, which will increase the total revenue of the company.

### JMISMDL

The Board of Directors has decided to existing Clause no. 121 of the Articles of Association of the Company is amended, replaced as "Until otherwise determined by the Company in General Meeting the number of Directors shall not be less than 5 and not more than 20" subject to approval in the EGM by the shareholders. Date of EGM: 23.11.2019, Time: 10:45 AM, Venue: Sky City Hotel, 47, Siddeshwari Road, Dhaka. Record Date: 27.10.2019.