

Daily Market Update

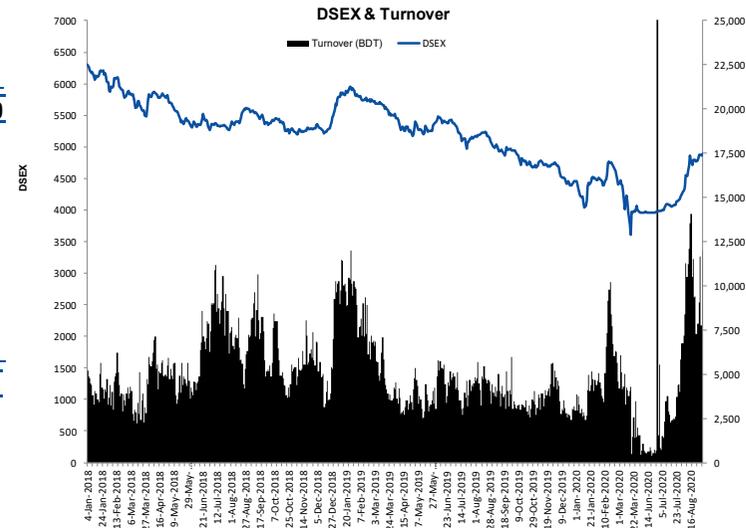
The market closed in green today. The benchmark index DSEX (+0.60%) gained 29.31 points and closed at 4,891.53. The blue-chip index DS30 (+1.08%), the Shariah-based index DSES (+0.53%), and the large-cap index CDSET (+0.85%) closed at 1,714.65, 1,137.34, and 999.70 points, respectively. All the large-cap sectors posted positive performance today except NBFIs (-0.31%). Food & Allied booked the highest gain of 2.73% followed by Fuel & Power (+0.54%), Pharmaceutical (+0.47%), Telecommunication (+0.26%), Engineering (+0.20%), and Bank (+0.05%), respectively. Block trades contributed 23.8% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+6.2%) was the most traded share with a turnover of BDT 1,541 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover (mn BDT)	% of Total Turnover
Banks	1,318.39	1,317.67	0.72	0.05%	30	537,398.8	17.02%	621.5	6.79%
NBFIs	1,796.15	1,801.67	-5.52	-0.31%	23	166,055.8	5.26%	420.9	4.60%
Mutual Funds	637.73	650.40	-12.67	-1.95%	37	33,142.3	1.05%	151.1	1.65%
General Insurance	2,449.84	2,406.49	43.35	1.80%	36	66,190.8	2.10%	882.4	9.64%
Life Insurance	1,991.00	1,981.18	9.82	0.50%	12	55,512.0	1.76%	74.9	0.82%
Telecommunication	4,524.61	4,512.66	11.96	0.26%	2	454,755.2	14.41%	246.7	2.69%
Pharmaceuticals	3,059.01	3,044.69	14.31	0.47%	32	576,627.4	18.27%	2,736.3	29.88%
Fuel & Power	1,722.38	1,713.06	9.33	0.54%	19	426,977.1	13.53%	484.4	5.29%
Cement	1,389.76	1,390.11	-0.35	-0.03%	7	84,518.8	2.68%	183.2	2.00%
Services & Real Estate	1,011.02	999.52	11.51	1.15%	8	40,365.2	1.28%	61.9	0.68%
Engineering	2,355.86	2,351.23	4.63	0.20%	39	152,869.1	4.84%	728.2	7.95%
Food & Allied	13,579.31	13,218.09	361.23	2.73%	17	250,765.4	7.94%	377.0	4.12%
IT	2,164.95	2,164.15	0.80	0.04%	9	23,936.1	0.76%	217.0	2.37%
Textiles	1,096.41	1,096.65	-0.25	-0.02%	56	110,663.4	3.51%	531.3	5.80%
Paper & Printing	6,273.02	6,144.60	128.41	2.09%	4	15,669.8	0.50%	119.4	1.30%
Tannery	1,763.53	1,749.13	14.40	0.82%	6	18,879.8	0.60%	106.6	1.16%
Jute	10,293.10	10,332.84	-39.74	-0.38%	3	2,274.8	0.07%	39.6	0.43%
Ceramics	437.13	434.25	2.88	0.66%	5	22,163.9	0.70%	100.3	1.10%
Miscellaneous	2,126.47	2,066.23	60.23	2.92%	13	117,991.0	3.74%	1,074.6	11.74%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Fu-Wang Ceramic	9.90	10.0%	2.4
Prime Insurance	24.20	10.0%	1.6
Express Insurance Limited	30.90	10.0%	108.0
Anwar Galvanizing Ltd.	110.40	10.0%	59.1
BD Thai Aluminium	15.50	9.9%	25.5
Hakkani Pulp & Paper	84.40	9.9%	97.1
AB Bank Limited	10.00	9.9%	50.1
Legacy Footwear	75.70	9.9%	52.0
Shinepukur Ceramics	15.70	9.8%	16.9
Janata Insurance	22.50	9.8%	41.7

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
EXIM Bank 1st Mutual Fund	5.30	-8.6%	1.3
SEML FBLSL Growth Fund	10.30	-5.5%	15.4
IFIL Islamic Mutual Fund-1	6.00	-4.8%	2.3
CAPM IBBL Islamic Mutual Fund	10.10	-4.7%	16.1
Prime Bank 1st ICB AMCL Mutual Fund	6.40	-4.5%	1.9
First Janata Bank Mutual Fund	4.40	-4.3%	1.0
SEML IBBL Shariah Fund	6.90	-4.2%	3.8
EBL NRB Mutual Fund	4.70	-4.1%	.1
EBL First MF	4.70	-4.1%	1.9
Sandhani Life Ins	23.50	-4.1%	12.2

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Beximco Pharmaceuticals	123.30	6.2%	1,541.3
Beximco Limited	28.10	6.0%	759.8
Square Pharmaceuticals	214.50	-1.0%	350.0
Orion Pharma Ltd.	58.10	1.4%	243.8
Grameenphone Ltd.	321.10	0.3%	161.7
BRAC Bank	39.00	-0.3%	159.7
Express Insurance Limited	30.90	10.0%	108.0
LafargeHolcim Bangladesh Limited	43.80	-0.2%	103.7
Lankabangla Finance	19.20	5.5%	103.2
Fine Foods Ltd	69.70	7.6%	100.0



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,891.53	4,862.22	29.31	0.60%	9.85%
DS30	1,714.65	1,696.41	18.24	1.08%	13.30%
DSES	1,137.34	1,131.38	5.96	0.53%	13.75%
CDSET	999.70	991.27	8.43	0.85%	11.11%

	Advanced	Declined	Unchanged	Total
All Category	162	153	42	357
A Category (Equity)	102	134	27	263
B Category (Equity)	29	14	9	52
N Category (Equity)	1	1	0	2
Z Category (Equity)	30	4	6	40
Mutual Funds	3	27	7	37
Corporate Bonds	1	0	0	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,706,350.8	3,687,942.2	
	Mn USD	43,624.7	43,408.0	0.5%
Turnover	Mn BDT	12,013.5	7,774.3	54.5%
	Mn USD	141.4	91.5	
Volume	Mn Shares	302.4	239.7	26.2%
Trade		181,432	170,532	6.4%

Top Twenty Market Cap	Mcap (Bn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	433.6	13.7%	161.65	12.8x	10.2x
British American Tobacco Bangladesh Company Limited	195.0	6.2%	94.87	22.5x	7.8x
Square Pharmaceuticals	181.1	5.7%	349.99	13.2x	2.8x
United Power Generation & Distribution Company Ltd	145.3	4.6%	86.10	20.2x	9.7x
Renata Ltd.	105.7	3.4%	6.13	24.7x	5.8x
Investment Corporation of Bangladesh	76.0	2.4%	8.99	NM	3.7x
Berger Paints	68.4	2.2%	16.68	28.3x	9.9x
Marico Bangladesh Limited	62.1	2.0%	15.99	22.2x	42.1x
BRAC Bank	51.7	1.6%	159.67	11.5x	1.2x
LafargeHolcim Bangladesh Limited	50.9	1.6%	103.71	28.3x	3.3x
Beximco Pharmaceuticals	50.0	1.6%	1,541.28	14.6x	1.7x
Summit Power	44.2	1.4%	40.33	7.8x	1.7x
Islami Bank	40.1	1.3%	32.51	7.3x	0.7x
Olympic Industries	37.0	1.2%	26.94	18.3x	5.7x
Dutch-Bangla Bank	35.2	1.1%	13.82	7.6x	1.1x
Titas Gas	34.9	1.1%	12.90	9.0x	0.5x
Eastern Bank	30.2	1.0%	5.12	7.6x	1.1x
Glaxo Smithkline	27.1	0.9%	10.97	47.5x	22.1x
MJL Bangladesh Limited	27.1	0.9%	6.67	14.7x	4.2x
National Life Insurance Company Ltd.	26.9	0.9%	4.57	NM	24.5x

Top Twenty Free Float Mcap	Free Float Mcap (Bn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	118.5	9.3%	349.99	13.2x	2.8x
Renata Ltd.	51.6	4.1%	6.13	24.7x	5.8x
British American Tobacco Bangladesh Company Limited	51.6	4.1%	94.87	22.5x	7.8x
Beximco Pharmaceuticals	43.4	3.4%	1,541.28	14.6x	10.2x
Grameenphone Ltd.	43.4	3.4%	161.65	12.8x	1.7x
BRAC Bank	28.8	2.3%	159.67	11.5x	1.2x
Olympic Industries	26.7	2.1%	26.94	18.3x	5.7x
Eastern Bank	20.7	1.6%	5.12	7.6x	1.1x
Islami Bank	20.5	1.6%	32.51	7.3x	0.7x
Beximco Limited	19.7	1.5%	759.77	26.0x	0.4x
LafargeHolcim Bangladesh Limited	18.0	1.4%	103.71	28.3x	3.3x
Pubali Bank	16.8	1.3%	4.49	11.2x	0.8x
Summit Power	16.3	1.3%	40.33	7.8x	1.7x
National Bank	16.0	1.3%	14.22	5.1x	0.5x
City Bank	15.7	1.2%	28.16	8.3x	0.9x
United Power Generation & Distribution Company Ltd	14.5	1.1%	86.10	20.2x	9.7x
Beacon Pharmaceuticals Limited	13.0	1.0%	68.23	161.2x	6.3x
Southeast Bank	11.9	0.9%	17.04	5.1x	0.5x
Prime Bank	11.7	0.9%	2.90	11.1x	0.6x
IFIC Bank	11.5	0.9%	96.49	6.3x	0.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Beximco Pharmaceuticals	123.00	114.00	2,563.43	22,471.00	1
CAPM IBBL Islamic Mutual Fund	11.50	11.50	0.58	50,003	2
DESCO	37.70	37.70	3.59	95,216	1
Eastland Insurance	28.50	28.50	1.44	50,631	2
Grameenphone Ltd.	292.70	292.70	1.37	4,665	1
GPH Ispat Limited	24.80	24.80	0.83	33,481	2
GQ Ball Pen	208.00	206.00	3.10	15,000	3
The Ibn Sina	275.00	275.00	0.54	1,950	1

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Kay and Que	215.00	215.00	0.79	3,650	1
Lankabangla Finance	18.20	18.20	3.64	200,000	1
Meghna Life Insurance	49.80	49.80	7.62	153,000	3
M.L. Dyeing Limited	46.80	45.60	4.84	105,000	8
Mutual Trust Bank	22.70	22.70	0.57	25,000	1
Orion Pharma Ltd.	61.50	61.50	3.08	50,000	2
Peoples Insurance	31.50	31.50	0.50	16,000	1
Paramount Textile Limited	57.00	57.00	0.79	13,850	1
Pubali Bank	25.80	25.80	2.58	100,000	1
Queen South Textiles Mills Limited	33.90	33.90	1.02	30,000	1
Reckitt Benckiser	3,800.00	3,800.00	1.90	500	1
Renata Ltd.	1,120.00	1,120.00	80.64	72,000	5
Republic Insurance	33.50	33.50	1.51	45,000	1
Samata Leather	133.00	133.00	0.63	4,700	1
Sea Pearl Beach Resort & Spa Limited	77.50	73.20	2.29	30,156	2
Southeast Bank	13.50	13.50	25.53	1,891,432	1
Shahjibazar Power Co. Ltd	78.20	78.20	0.87	11,058	1
Square Pharmaceuticals	215.00	215.00	120.40	560,000	5
United Commercial Bank Limited	13.50	13.50	21.60	1,600,001	2
Uttara Bank	24.00	24.00	0.60	25,092	1
Total			2,856.25		59

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
GSPFINANCE	GSP Finance Company (Bangladesh) Ltd.	-	4.5%	6.0%	31-Dec-19	03-Sep-20
GRAMEENS2	Grameen One: Scheme Two	-	0.0%	7.0%	30-Jun-20	06-Sep-20
PRAGATILIF	Pragati Life Insurance Ltd.	1R:1	0.0%	0.0%	-	07-Sep-20
SEBL1STMF	Southeast Bank 1st Mutual Fund	-	0.0%	3.0%	30-Jun-20	09-Sep-20
NLI1STMF	NLI First Mutual Fund	-	0.0%	5.0%	30-Jun-20	09-Sep-20

Important DSE News

REGUL

BSEC News: As per BSEC Order No. SEC/CMRRCD/2009-193/08 dated September 01, 2020, clearing day for contracts listed under Z category other than contracts in spot market or contracts with contract (howla) type Delivery versus Payment "DVP" shall be the third day following the Trading Day (i.e. T+3). This Order shall have effect from Today (02.09.2020).

PADMAOIL

The Company has informed that for the expansion of business, the Company has signed an agreement with Energy Pack Power Generation Limited, Dhaka to sale LPG by establishing LPG (Autogas) Refueling Station and Liquefied Petroleum Gas Conversion workshop parallel to the sale of Petroleum Oil through company's registered Filling Stations. As per the agreement, the Company will receive royalty of Tk. 0.50 against per Liter sale of LPG.

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MEGHNALIFE

(Q1 Un-audited): Decrease in life revenue account for Jan-Mar 2020 was Tk. 455.76 million with total life insurance fund of Tk. 17,451.96 million as against decrease in life revenue account of Tk. 403.02 million and Tk. 16,464.31 million respectively for the same period of the previous year.

(Q2 Un-audited): Increase in life revenue account for Apr-June 2020 was Tk. 173.91 million with total life insurance fund of Tk. 18,081.63 million as against increase in life revenue account of Tk. 299.99 million and Tk. 17,167.32 million respectively for the same period of the previous year. Decrease in life revenue account for Jan-June 2020 was Tk. 281.86 million with total life insurance fund of Tk. 17,625.87 million as against decrease in life revenue account of Tk. 103.03 million and Tk. 16,764.30 million respectively for the same period of the previous year.

ABBANK

As per BSEC, Letter No. SEC/SRMIC/94-231/51-1 dated September 01, 2020, the Company shall be placed in 'A' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

HEIDELBCEM

As per BSEC, Letter No. SEC/SRMIC/94-231/51-5 dated September 01, 2020, the Company shall be placed in 'A' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

FUWANGCER

As per BSEC, Letter No. SEC/SRMIC/94-231/51-4 dated September 01, 2020, the Company shall be placed in 'B' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

KBPPWBIL

As per BSEC, Letter No. SEC/SRMIC/94-231/51-6 dated September 01, 2020, the Company shall be placed in 'B' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

LIBRAINFU

As per BSEC, Letter No. SEC/SRMIC/94-231/51-8 dated September 01, 2020, the Company shall be placed in 'A' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

PRIMEINSUR

As per BSEC, Letter No. SEC/SRMIC/94-231/51-9 dated September 01, 2020, the Company shall be placed in 'A' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

ZAHINTEX

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As per BSEC, Letter No. SEC/SRMIC/94-231/51-13 dated September 01, 2020, the Company shall be placed in 'B' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

APOLOISPAT

As per BSEC, Letter No. SEC/SRMIC/94-231/51-2 dated September 01, 2020, the Company shall be placed in 'B' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

SAFKOSPINN

As per BSEC, Letter No. SEC/SRMIC/94-231/51-11 dated September 01, 2020, the Company shall be placed in 'B' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

SALVOCHEM

As per BSEC Letter No. SEC/SRMIC/94-231/51-12 dated September 01, 2020, the Company shall be placed in 'B' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

BDTHAI

As per BSEC Letter No. SEC/SRMIC/94-231/51-03 dated September 01, 2020, the Company shall be placed in 'B' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

RENWICKJA

As per BSEC Letter No. SEC/SRMIC/94-231/51-10 dated September 01, 2020, the Company shall be placed in 'A' category from existing 'Z' category with effect from Today, September 02, 2020 in line with the provisions of Commission's Order No. SEC/CMRRCD/2009-93/08 dated September 01, 2020.

EXCH

DSENEWS: This is to inform all concerned that BSEC vide an Order No. SEC/CMRRCD/2009-193/08 dated 01 September 2020 has imposed, inter alia, the following condition: "Clearing day for contracts listed under Z-category other than contracts in spot market or contracts with contract (howla) type Delivery Versus Payment "DVP" shall be the third day following the Trading Day (i.e. T+3)." This Order shall have immediate effect. Therefore, all TREC Holder Companies are requested to take necessary actions, among others, to update their Back-office accordingly before end of today's (September 2, 2020) trading session of DSE.

SOUTHEASTB

Southeast Bank Limited, one of the Corporate Directors of the Company, has expressed its intention to buy 20,00,000 shares of the company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

Southeast Bank Limited, one of the Corporate Directors of the Company, has expressed its intention to buy 20,00,000 shares of the company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

ASIAINS

Southeast Bank Limited, one of the Corporate Directors of the Company, has expressed its intention to buy 20,00,000 shares of the company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

ACMELAB

Mr. Mizanur Rahman Sinha, one of the Sponsor Directors of the Company, has expressed his intention to transfer 35,16,446 shares out of his total holding of 2,07,61,565 shares to his daughter Ms. Tasneem Sinha, another Director 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.

Ms. Jahanara Mizan Sinha, one of the Sponsor Directors of the Company, has expressed her intention to transfer 35,16,672 shares out of his total holding of 1,05,19,744 shares to her son Mr. Tanveer Sinha, another Director 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.