

Daily Market Update

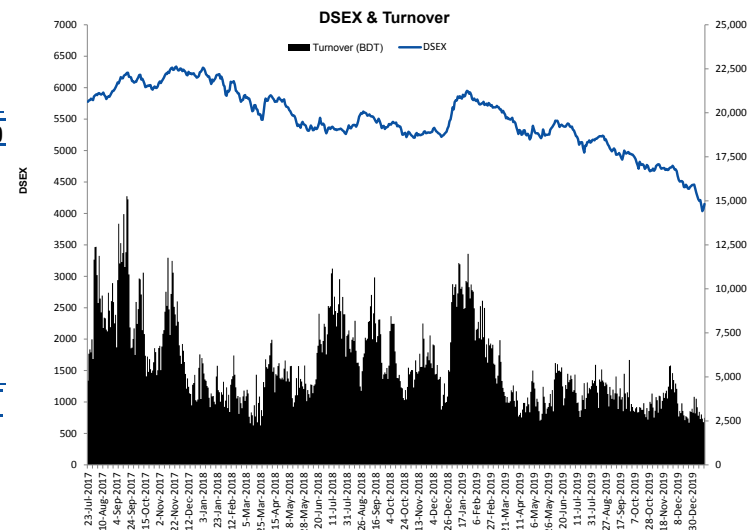
Market closed in green today. The benchmark index DSEX (+2.01%) gained 81.63 points and closed at 4,149.83 points. The blue chip index DS30 (+2.58%), the Shariah-based index DSES (+2.85%), and the large cap index CDSET (+2.34%) all closed in green. The large cap sectors showed positive performance today except NBFIs (-0.23%). Telecommunication booked the highest gain of 4.48% followed by Pharmaceuticals (+3.85%), Banks (+2.09%), Food & Allied (+1.81%), Power (+0.45%), and Engineering (+0.26%). Turnover stood at BDT 2.7 billion (USD 32.2 million). Square Pharmaceuticals (+7.5%) was the most traded share with a turnover of BDT 213.2 million.

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Anlimayarn Deying Ltd.	40.70	9.7%	21.6
Meghna Pet Industries	10.50	9.4%	.1
Eastern Insurance	35.80	8.8%	2.5
Beach Hatchery Ltd.	16.20	8.7%	2.3
Square Pharmaceuticals	178.40	7.5%	213.2
Sea Pearl Beach Resort & Spa Limited	44.00	7.3%	109.9
Fareast Finance & Investment Limited	3.20	6.7%	.1
Sonar Bangla Ins	32.10	6.6%	24.4
Standard Ceramic	645.30	5.8%	47.2
FAS Finance & Investments Limited	5.50	5.8%	11.0

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
S. S. Steel Limited	16.00	-9.6%	46.0
ADN Telecom Limited	36.40	-9.5%	110.5
Aziz Pipes Ltd.	80.30	-8.9%	10.4
Premier Cement Mills Limited	39.50	-8.8%	.0
United Airways (BD) Ltd.	1.40	-6.7%	.6
Ring Shine Textiles Limited	7.40	-6.3%	58.7
Heidelberg Cement	125.30	-5.1%	4.4
Aramit Cement Limited	13.30	-5.0%	.4
Golden Harvest Agro Industries Ltd.	14.30	-4.7%	19.2
Northern Jute	414.80	-4.6%	44.1

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Square Pharmaceuticals	178.40	7.5%	213.2
LafargeHolcim Bangladesh Limited	38.70	-2.5%	113.6
ADN Telecom Limited	36.40	-9.5%	110.5
Sea Pearl Beach Resort & Spa Limited	44.00	7.3%	109.9
BRAC Bank	50.30	2.7%	98.3
Grameenphone Ltd.	242.20	4.7%	89.5
Ring Shine Textiles Limited	7.40	-6.3%	58.7
Beacon Pharmaceuticals Limited	44.40	0.7%	58.0
Khulna Power Company Limited	50.30	-1.2%	49.0
Standard Ceramic	645.30	5.8%	47.2

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,213.20	1,188.32	24.89	2.09%	30	494,502.5	18.84%	318.3	12.29%
NBFIs	1,381.19	1,384.33	-3.14	-0.23%	23	127,689.5	4.86%	58.1	2.24%
Mutual Funds	566.68	564.09	2.59	0.46%	37	29,448.9	1.12%	35.8	1.38%
General Insurance	1,787.79	1,750.40	37.39	2.14%	35	48,302.8	1.84%	201.1	7.77%
Life Insurance	1,986.73	1,992.34	-5.61	-0.28%	12	55,392.9	2.11%	26.4	1.02%
Telecommunication	3,385.68	3,240.42	145.26	4.48%	2	340,284.6	12.96%	110.6	4.27%
Pharmaceuticals	2,351.94	2,264.72	87.22	3.85%	32	443,585.5	16.90%	375.8	14.51%
Fuel & Power	1,500.49	1,493.73	6.76	0.45%	20	371,970.1	14.17%	134.6	5.20%
Cement	1,160.44	1,188.69	-28.25	-2.38%	7	70,572.8	2.69%	121.8	4.70%
Services & Real Estate	862.89	850.28	12.61	1.48%	8	34,450.9	1.31%	118.5	4.58%
Engineering	2,099.30	2,093.81	5.49	0.26%	39	136,743.6	5.21%	308.1	11.90%
Food & Allied	11,581.02	11,374.60	206.42	1.81%	17	213,862.2	8.15%	99.2	3.83%
IT	1,864.91	1,890.97	-26.06	-1.38%	9	20,618.8	0.79%	205.7	7.94%
Textiles	948.79	951.11	-2.32	-0.24%	56	95,764.1	3.65%	245.5	9.48%
Paper & Printing	4,702.62	4,664.59	38.04	0.82%	3	8,991.0	0.34%	5.2	0.20%
Tannery	1,676.11	1,677.12	-1.01	-0.06%	6	17,943.9	0.68%	22.2	0.86%
Jute	8,353.71	8,606.91	-253.20	-2.94%	3	1,846.2	0.07%	45.2	1.75%
Ceramics	422.55	419.58	2.97	0.71%	5	21,424.9	0.82%	63.6	2.46%
Miscellaneous	1,648.32	1,629.41	18.91	1.16%	13	91,460.2	3.48%	93.5	3.61%



Associate:
Md. Rafiqul Islam
 (880)1708805229
 mrafiqulislam@bracepl.com

Associate:
Md. Mahirul Quddus
 (880)1709636546
 mmahirul.quddus@bracepl.com

Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,149.83	4,068.20	81.63	2.01%	-6.81%
DS30	1,406.60	1,371.23	35.36	2.58%	-7.05%
DSES	940.29	914.25	26.04	2.85%	-5.95%
CDSET	845.04	825.68	19.36	2.34%	-6.08%

	Advanced	Declined	Unchanged	Total
All Category	194	112	47	353
A Category (Equity)	150	70	28	248
B Category (Equity)	23	16	5	44
N Category (Equity)	3	6	1	10
Z Category (Equity)	18	20	13	51
Mutual Funds	11	9	15	35
Corporate Bonds	0	2	0	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,193,708.5	3,145,590.3	
	Mn USD	38,418.2	37,839.4	1.5%
Turnover	Mn BDT	2,674.9	2,428.3	10.2%
	Mn USD	32.2	29.2	
Volume	Mn Shares	101.3	85.4	18.5%
Trade		100,995	91,004	11.0%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	327.0	12.5%	89.48	9.4x	7.7x
British American Tobacco Bangladesh Company Limited	162.5	6.2%	38.99	18.9x	6.7x
Square Pharmaceuticals	150.6	5.7%	213.21	11.7x	2.3x
United Power Generation & Distribution Company Ltd	133.8	5.1%	35.92	15.8x	9.1x
Renata Ltd.	96.6	3.7%	5.95	24.5x	5.3x
BRAC Bank	62.0	2.4%	98.33	12.1x	1.6x
Berger Paints	60.3	2.3%	3.54	26.0x	9.0x
Marico Bangladesh Limited	50.4	1.9%	2.08	20.1x	34.2x
Investment Corporation of Bangladesh	49.1	1.9%	1.17	NM	2.4x
LafargeHolcim Bangladesh Limited	44.9	1.7%	113.63	25.0x	2.9x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	98.8	9.2%	213.21	11.7x	2.3x
Renata Ltd.	47.2	4.4%	5.95	24.5x	5.3x
British American Tobacco Bangladesh Company Limited	43.0	4.0%	38.99	18.9x	6.7x
BRAC Bank	34.6	3.2%	98.33	12.1x	1.6x
Grameenphone Ltd.	32.7	3.1%	89.48	9.4x	7.7x
Olympic Industries	26.4	2.5%	18.53	18.8x	5.8x
Beximco Pharmaceuticals	21.1	2.0%	10.80	7.7x	0.9x
Eastern Bank	17.4	1.6%	.25	7.8x	1.1x
Pubali Bank	16.8	1.6%	.50	6.4x	0.8x
LafargeHolcim Bangladesh Limited	15.9	1.5%	113.63	25.0x	2.9x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Asian Tiger Sandhani Life Growth Fund	7.40	7.40	1.48	200,000	2
Bank Asia Ltd.	17.70	17.70	14.78	835,001	2
Bangladesh Building Systems Ltd.	18.40	18.40	0.52	28,000	1
Berger Paints	1,285.00	1,285.00	12.85	10,000	2
BRAC Bank	50.00	50.00	10.00	200,000	3
Federal Insurance	10.80	10.80	14.62	1,353,500	1
Northern Insurance	21.50	21.50	0.50	23,260	1
SEML Lecture Equity Management Fund	5.50	5.50	1.10	200,000	1
SK Trims & Industries Limited	49.00	44.60	7.45	156,100	3
Standard Ceramic	610.30	590.00	11.05	18,610	8

Important DSE News

APSCLBOND

Trading of the Bond of APSCL Non-Convertible and Fully Redeemable Coupon Bearing Bond will commence at DSE today (January 16, 2020) under 'N' category. DSE Trading Code for APSCL Non-Convertible and Fully Redeemable Coupon Bearing Bond is "APSCLBOND" and DSE Company Code is 26004. Some salient features of the Bond are as follows: 1. Name of the bond: APSCL Non-Convertible and Fully Redeemable Coupon Bearing Bond, 2. Issuer: Ashuganj Power Station Company Limited, 3. Issue Price: Tk. 5,000.00 per bond, 4. Face Value: Tk. 5,000.00 per bond, 5. Market Lot (bond): 1 (One), 6. Tenor: 7 years from the date of the issue; 7. Range of Coupon Rate: 8.5%-10.5% (Reference Rate+ Coupon Margin); 8. Coupon Payment: Coupon to be paid semi-annually. First coupon will be paid after 12 months of the drawdown.

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PENINSULA

(Q2 Un-audited): EPS was Tk. 0.13 for October-December 2019 as against Tk. 0.23 for October-December 2018; EPS was Tk. 0.30 for July-December 2019 as against Tk. 0.64 for July-December 2018. NOCFPS was Tk. 0.65 for July-December 2019 as against Tk. 0.23 for July-December 2018. NAV per share was Tk. 31.18 as on December 31, 2019 and Tk. 31.63 as on June 30, 2019.

SEAPEARL

(Q2 Un-audited): EPS was Tk. 0.16 for October-December 2019 as against Tk. 0.19 for October-December 2018; EPS was Tk. 0.27 for July-December 2019 as against Tk. 0.32 for July-December 2018. NOCFPS was Tk. 1.53 for July-December 2019 as against Tk. 1.60 for July-December 2018. NAV per share was Tk. 10.42 as on December 31, 2019 and Tk. 10.66 as on June 30, 2019.

MATINSPIINN

(Q2 Un-audited): EPS was Tk. 0.63 for October-December 2019 as against Tk. 0.55 for October-December 2018; EPS was Tk. 0.81 for July-December 2019 as against Tk. 1.14 for July-December 2018. NOCFPS was Tk. 4.26 for July-December 2019 as against Tk. 0.64 for July-December 2018. NAV per share (with Revaluation reserves) was Tk. 42.22 as on December 31, 2019 and Tk. 42.90 as on June 30, 2019. The Company has also informed that EPS for July-December 2019 was decreased due to lower sales price and NOCFPS was increased significantly compared to the same period of last year because of increase in collection from customers.

GBBPOWER

The Company will be placed in 'A' category from existing 'Z' category with effect from January 19, 2020 as the Company has reported disbursement of 10% cash dividend for the year ended on June 30, 2019.

SQURPHARMA

Samuel S Chowdhury, one of the Directors of the Company, has expressed his intention to buy 3,00,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchanges (DSE & CSE) within next 30 working days.

SEAPEARL

The Company will be placed in 'B' category from existing 'N' category with effect from January 19, 2020 as the Company has reported disbursement of 5% stock dividend for the year ended on June 30, 2019.

BDAUTOCA

Mrs. Rozina Murad Ali Lakhani, one of the Sponsors of the Company, has expressed her intention to sell 26,000 shares out of her total holding of 2,24,645 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

EXCH

In accordance with the DSE Bangladesh Index Methodology, designed by S&P Dow Jones Indices, DSEX has been reconstituted with two hundred and eighty-five (285) companies after January 2020 annual re-balancing, effects from January 19, 2020. Total twenty-one (21) companies,

namely, 1) Reliance Insurance Ltd., 2) Genex Infosys Ltd., 3) Monno Jute Stafflers Ltd., 4) Indo-Bangla Pharmaceuticals Ltd., 5) Kattali Textile Ltd., 6) Esquire Knit Composite Ltd., 7) Peoples Insurance Company Ltd., 8) Bangladesh General Insurance Company Ltd., 9) Silco Pharmaceuticals Ltd., 10) Runner Automobiles Ltd., 11) Progressive Life Insurance Co. Ltd., 12) Eastern Insurance Co. Ltd. 13) Central Insurance Company Ltd., 14) Asia Insurance Co. Ltd., 15) Phoenix Insurance Company Ltd., 16) Takaful Islami Insurance Ltd., 17) Agrani Insurance Co Ltd., 18) Janata Insurance Company Ltd., 19) Sea Pearl Beach Resort & Spa Ltd., 20) New Line Clothings Ltd. and 21) Coppertech Industries Ltd. will be included in the DSEX. On the other hand, eighteen (18) existing constituents, namely, 1) Green Delta Insurance Company Ltd., 2) Square Textiles Ltd., 3) M.I. Cement Factory Ltd., 4) Hwa Well Textiles (BD) Ltd., 5) Meghna Cement Mills Ltd., 6) ICB Islamic Bank Ltd., 7) Matin Spinning Mills Ltd. 8) Golden Son Ltd., 9) Global Heavy Chemicals Ltd., 10) Delta Spinners Ltd., 11) Padma Islami Life Insurance Ltd., 12) C & A Textiles Ltd., 13) Alltex Industries Ltd., 14) Fareast Finance & Investment Ltd., 15) Zahintex Industries Ltd., 16) Tung Hai Knitting and Dyeing Ltd., 17) Meghna Condensed Milk Ind. Ltd. and 18) Peoples Leasing & Fin. Services Ltd. failed to retain their membership as they failed to meet the criteria. After semi-annual re-balancing of DSE 30 Index (DS30), as per criteria set by S&P Dow Jones Indices, five (5) new companies, namely 1) Pubali Bank Ltd., 2) Beacon Pharmaceuticals Ltd., 3) National Life Insurance Co Ltd., 4) Padma Oil Co. Ltd., 5) Paramount Textile Ltd. will be included in the DS30. Conversely, five (5) existing constituent of DS30, namely 1) Delta Life Insurance Co. Ltd., 2) Unique Hotel & Resorts Ltd., (3) Islami Bank BD Ltd., 4) MJL Bangladesh Ltd. and 5) Active Fine Chemicals Ltd. failed to retain its membership in DS30. This re-balance will be effective from January 19, 2020.