

Daily Market Update

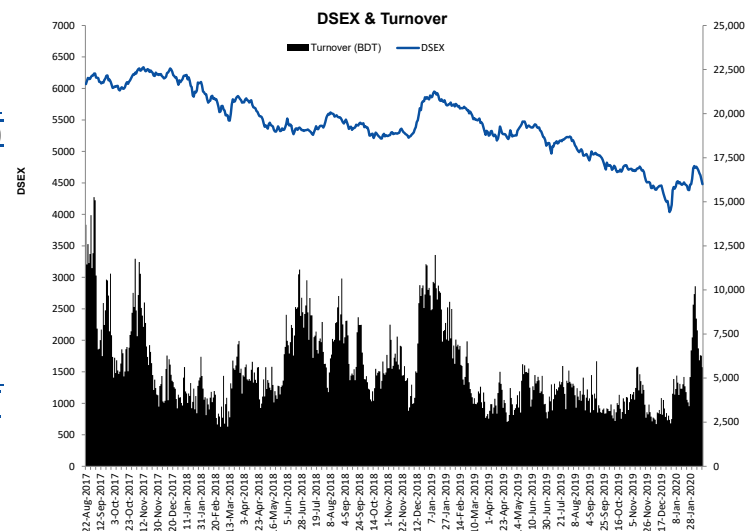
Market closed in red today. The benchmark index DSEX (-1.51%) lost 68.88 points and closed at 4,480.23 points. The blue chip index DS30 (-1.67%), the large cap index CDSET (-1.78%) and the Shariah-based index DSES (-1.45%) all closed in red. All the large cap sectors showed negative performance today. Telecommunication experienced the highest loss of 4.69% followed by Food & Allied (-2.19%), Fuel & Power (-1.80%), Banks (-1.53%), Engineering (-1.45%), Pharmaceuticals (-0.98%) and NBFIs (-0.82%). Turnover stood at BDT 5.6 billion (USD 67.5 million). BRAC Bank (-4.6%) was the most traded share with a turnover of BDT 307.9 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,191.12	1,209.58	-18.45	-1.53%	30	485,503.1	16.98%	488.3	9.40%
NBFIs	1,551.94	1,564.85	-12.90	-0.82%	23	143,476.4	5.02%	85.7	1.65%
Mutual Funds	635.25	636.93	-1.69	-0.26%	37	33,012.6	1.15%	103.4	1.99%
General Insurance	1,820.91	1,847.07	-26.16	-1.42%	35	49,197.6	1.72%	170.7	3.29%
Life Insurance	2,036.40	2,085.50	-49.09	-2.35%	12	56,777.9	1.99%	69.8	1.34%
Telecommunication	3,846.18	4,035.49	-189.31	-4.69%	2	386,567.6	13.52%	158.9	3.06%
Pharmaceuticals	2,595.16	2,620.98	-25.81	-0.98%	32	489,458.4	17.12%	1,048.7	20.18%
Fuel & Power	1,613.95	1,643.49	-29.54	-1.80%	19	400,096.3	13.99%	400.6	7.71%
Cement	1,424.93	1,436.34	-11.41	-0.79%	7	86,657.9	3.03%	160.0	3.08%
Services & Real Estate	1,038.98	1,052.02	-13.05	-1.24%	8	41,481.1	1.45%	98.4	1.89%
Engineering	2,413.03	2,448.57	-35.55	-1.45%	39	157,178.9	5.50%	785.9	15.12%
Food & Allied	12,542.20	12,822.42	-280.21	-2.19%	17	231,612.1	8.10%	231.2	4.45%
IT	2,059.49	2,067.66	-8.17	-0.40%	9	22,770.2	0.80%	128.9	2.48%
Textiles	1,154.73	1,166.28	-11.55	-0.99%	56	116,549.8	4.08%	828.1	15.94%
Paper & Printing	5,950.65	6,119.73	-169.08	-2.76%	3	11,377.1	0.40%	66.9	1.29%
Tannery	1,909.19	1,922.17	-12.98	-0.68%	6	20,439.2	0.71%	61.8	1.19%
Jute	8,801.29	9,010.21	-208.92	-2.32%	3	1,945.1	0.07%	43.6	0.84%
Ceramics	432.53	447.52	-14.99	-3.35%	5	21,930.9	0.77%	53.5	1.03%
Miscellaneous	1,864.02	1,880.13	-16.11	-0.86%	13	103,428.4	3.62%	212.1	4.08%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Central Pharmaceuticals Limited	13.80	9.5%	129.2
Zeal Bangla Sugar Mills	37.30	8.1%	.0
Bengal Windsor Thermoplastics Ltd	22.80	7.5%	46.9
Intraco Refueling Station Limited	17.10	7.5%	86.5
R.N. Spinning Mills Limited	4.30	7.5%	8.7
Daffodil Computers Ltd.	57.80	6.6%	23.9
Far Chemical Industries Limited	11.20	5.7%	110.0
C & A Textiles Limited	2.00	5.3%	1.6
Olympic Accessories Limited	8.00	5.3%	36.6
Phoenix Finance 1st Mutual Fund	8.60	4.9%	27.0

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Standard Ceramic	425.60	-8.7%	32.0
International Leasing	3.90	-7.1%	8.6
Saiham Textile	33.30	-6.5%	10.2
United Airways (BD) Ltd.	1.60	-5.9%	2.1
Hakkani Pulp & Paper	73.30	-5.8%	27.1
Global Heavy Chemicals Limited	37.20	-5.6%	3.1
Libra Infusions Limited	578.90	-5.4%	1.3
Beximco Synthetics	3.50	-5.4%	.2
Familytex (BD) Limited	1.90	-5.0%	3.3
Islami Insurance	25.20	-4.9%	4.4

Most Traded Share	Close	Δ%	Turnover (mn BDT)
BRAC Bank	37.10	-4.6%	307.9
VFS Thread Dyeing Limited	30.40	2.0%	166.8
Central Pharmaceuticals Limited	13.80	9.5%	129.2
Silva Pharmaceuticals Limited	21.00	3.4%	127.5
Indo-Bangla Pharmaceuticals Limited	25.40	-0.4%	116.2
Orion Pharma Ltd.	44.30	-3.7%	114.6
National Polymer	73.80	0.4%	113.4
Grameenphone Ltd.	274.40	-4.8%	112.6
Far Chemical Industries Limited	11.20	5.7%	110.0
LafargeHolcim Bangladesh Limited	44.10	-0.7%	99.0



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,480.23	4,549.11	-68.88	-1.51%	0.61%
DS30	1,492.37	1,517.71	-25.34	-1.67%	-1.39%
DSES	1,044.91	1,060.32	-15.41	-1.45%	4.51%
CDSET	886.44	902.55	-16.11	-1.78%	-1.48%

	Advanced	Declined	Unchanged	Total
All Category	60	250	46	356
A Category (Equity)	42	187	29	258
B Category (Equity)	7	36	5	48
N Category (Equity)	0	2	0	2
Z Category (Equity)	11	25	12	48
Mutual Funds	11	11	15	37
Corporate Bonds	0	2	0	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,429,831.8	3,484,419.0	
	Mn USD	41,258.7	41,915.3	-1.6%
Turnover	Mn BDT	5,614.2	6,273.4	
	Mn USD	67.5	75.5	-10.5%
Volume	Mn Shares	215.2	252.0	-14.6%
Trade		145,319	158,563	-8.4%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	370.5	13.0%	112.59	10.7x	8.7x
British American Tobacco Bangladesh Company Limited	177.6	6.2%	50.88	20.6x	7.3x
Square Pharmaceuticals	163.3	5.7%	88.91	12.3x	2.5x
United Power Generation & Distribution Company Ltd	132.9	4.7%	25.52	16.4x	9.0x
Renata Ltd.	96.5	3.4%	6.26	23.9x	5.3x
Berger Paints	65.2	2.3%	3.20	26.8x	9.7x
Investment Corporation of Bangladesh	61.5	2.2%	2.55	NM	3.0x
Marico Bangladesh Limited	51.4	1.8%	2.86	19.7x	34.9x
LafargeHolcim Bangladesh Limited	51.2	1.8%	99.01	28.4x	3.4x
BRAC Bank	45.8	1.6%	307.88	8.9x	1.2x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	107.1	9.2%	88.91	12.3x	2.5x
Renata Ltd.	47.1	4.1%	6.26	23.9x	5.3x
British American Tobacco Bangladesh Company Limited	47.0	4.1%	50.88	20.6x	7.3x
Grameenphone Ltd.	37.1	3.2%	112.59	10.7x	8.7x
Olympic Industries	26.5	2.3%	3.63	18.3x	5.8x
Beximco Pharmaceuticals	25.7	2.2%	10.00	9.1x	1.1x
BRAC Bank	25.5	2.2%	307.88	8.9x	1.2x
Eastern Bank	18.7	1.6%	1.27	8.3x	1.1x
LafargeHolcim Bangladesh Limited	18.1	1.6%	99.01	28.4x	3.4x
Pubali Bank	16.8	1.4%	1.81	6.4x	0.8x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
Anwar Galvanizing Ltd.	80.80	80.80	0.65	8,000	1
Bangas Ltd.	152.00	152.00	0.56	3,700	1
Beacon Pharmaceuticals Limited	59.00	59.00	333.35	5,650,000	4
BRAC Bank	38.30	37.80	4.19	110,000	2
Beximco Pharmaceuticals	72.90	72.90	45.83	628,625	1
Kohinoor Chemicals	439.00	439.00	1.98	4,500	1
MBL 1st Mutual Fund	7.70	7.70	0.73	95,000	1
M.L. Dyeing Limited	67.30	67.30	6.73	100,000	2
SEML FBLSL Growth Fund	10.20	10.20	1.47	144,000	1
SK Trims & Industries Limited	72.00	72.00	0.72	10,000	1
Square Pharmaceuticals	194.00	193.70	21.33	110,000	4

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
BEACHHATCH	Beach Hatchery Ltd.		0.0%	0.0%	30-Jun-2019	9-Jan-2020

Important DSE News

ESQUIRENIT

The Company will be placed in 'A' category from existing 'N' category with effect from March 01, 2020 as the Company has reported disbursement of 15% cash dividend for the

year ended on June 30, 2019.

RINGSHINE

Universe Knitting Garments Limited, a Placement holder of the Company (where Mr. Sung Wey Min is the Chairman of Universe Knitting Garments Limited and Managing Director & Sponsor of Ring Shine Textiles Limited), has expressed its intention to sell of 36,86,587 Bonus shares out of its total holding of 2,82,63,837 shares of the Company at prevailing market price (in the Block market) through Stock Exchange (DSE).