

Daily Market Update

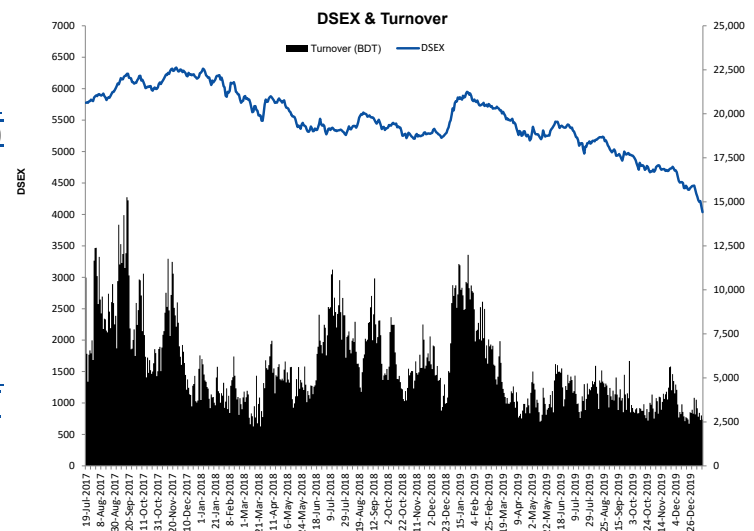
Market closed in red today. The benchmark index DSEX (-2.12%) lost 87.24 points and closed at 4,036.24 points. The blue chip index DS30 (-1.88%), the Shariah-based index DSES (-2.47%), and the large cap index CDSET (-1.64%) all closed in red. All the large cap sectors showed negative performance today. NBFIs experienced the highest loss of 3.15%, followed by Telecommunication (-2.89%), Engineering (-2.70%), Pharmaceuticals (-2.43%), Food & Allied (-2.24%), Power (-1.55%), and Banks (-1.17%). Turnover stood at BDT 2.6 billion (USD 31.6 million). LafargeHolcim Bangladesh Limited (-2.2%) was the most traded share with a turnover of BDT 185.5 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,175.28	1,189.15	-13.87	-1.17%	30	479,047.4	18.67%	219.0	8.75%
NBFIs	1,360.26	1,404.52	-44.26	-3.15%	23	125,754.7	4.90%	89.0	3.56%
Mutual Funds	560.07	561.04	-0.97	-0.17%	37	29,105.4	1.13%	58.7	2.35%
General Insurance	1,734.75	1,795.13	-60.38	-3.36%	35	46,869.8	1.83%	178.9	7.15%
Life Insurance	1,975.34	2,017.84	-42.50	-2.11%	12	55,075.4	2.15%	28.6	1.14%
Telecommunication	3,280.66	3,378.15	-97.49	-2.89%	2	329,729.5	12.85%	62.2	2.48%
Pharmaceuticals	2,241.10	2,297.00	-55.90	-2.43%	32	422,681.0	16.47%	336.9	13.46%
Fuel & Power	1,501.51	1,525.10	-23.59	-1.55%	20	372,222.5	14.51%	179.9	7.19%
Cement	1,194.48	1,227.08	-32.60	-2.66%	7	72,642.8	2.83%	192.2	7.68%
Services & Real Estate	844.99	866.08	-21.09	-2.43%	8	33,736.1	1.31%	18.7	0.75%
Engineering	2,079.31	2,137.03	-57.72	-2.70%	39	135,441.7	5.28%	300.7	12.01%
Food & Allied	11,246.52	11,503.70	-257.18	-2.24%	17	207,685.2	8.09%	116.9	4.67%
IT	1,918.87	1,931.62	-12.75	-0.66%	9	21,215.5	0.83%	205.0	8.19%
Textiles	941.41	965.29	-23.89	-2.47%	56	95,018.4	3.70%	253.9	10.14%
Paper & Printing	4,654.57	4,638.62	15.96	0.34%	3	8,899.1	0.35%	7.3	0.29%
Tannery	1,658.70	1,699.37	-40.67	-2.39%	6	17,757.6	0.69%	35.6	1.42%
Jute	8,808.98	9,437.92	-628.94	-6.66%	3	1,946.8	0.08%	58.3	2.33%
Ceramics	419.31	440.93	-21.62	-4.90%	5	21,260.7	0.83%	42.8	1.71%
Miscellaneous	1,620.26	1,656.54	-36.28	-2.19%	13	89,902.9	3.50%	118.0	4.71%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Phoenix Finance 1st Mutual Fund	5.30	6.0%	5.5
ADN Telecom Limited	42.80	4.9%	101.3
EBL NRB Mutual Fund	4.40	4.8%	.3
CAPM BDBL Mutual Fund 01	7.70	4.1%	.1
Olympic Industries	173.80	3.7%	22.3
Beach Hatchery Ltd.	14.20	3.6%	.7
Imam Button	24.80	2.9%	.3
New Line Clothings Limited	14.40	2.9%	12.1
Zeal Bangla Sugar Mills	29.00	2.8%	.0
Popular Life First Mutual Fund	4.10	2.5%	6.4

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
S. S. Steel Limited	17.20	-9.9%	32.3
Al-Haj Textile Mills Limited	31.50	-9.7%	3.6
Golden Harvest Agro Industries Ltd.	15.00	-9.6%	16.7
Meghna Pet Industries	8.80	-9.3%	.1
Samata Leather	124.70	-9.1%	5.3
AIBL 1st Islamic Mutual Fund	6.30	-8.7%	.0
Meghna Condensed Milk	11.70	-8.6%	.3
Stylecraft Limited	203.70	-8.5%	20.6
Beacon Pharmaceuticals Limited	44.00	-7.8%	108.4
Northern Jute	475.70	-7.5%	54.2

Most Traded Share	Close	Δ%	Turnover (mn BDT)
LafargeHolcim Bangladesh Limited	40.20	-2.2%	185.5
Beacon Pharmaceuticals Limited	44.00	-7.8%	108.4
ADN Telecom Limited	42.80	4.9%	101.3
Khulna Power Company Limited	51.00	-2.1%	80.1
Square Pharmaceuticals	162.70	-3.3%	79.1
Ring Shine Textiles Limited	7.80	-3.7%	66.0
BRAC Bank	47.60	0.8%	57.8
Northern Jute	475.70	-7.5%	54.2
Daffodil Computers Ltd.	56.00	-0.2%	54.1
Grameenphone Ltd.	234.20	-2.9%	45.9



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,036.24	4,123.48	-87.24	-2.12%	-9.36%
DS30	1,361.64	1,387.78	-26.14	-1.88%	-10.02%
DSES	907.03	929.97	-22.94	-2.47%	-9.28%
CDSET	819.15	832.81	-13.66	-1.64%	-8.96%

	Advanced	Declined	Unchanged	Total
All Category	32	293	30	355
A Category (Equity)	19	211	20	250
B Category (Equity)	5	35	4	44
N Category (Equity)	2	7	1	10
Z Category (Equity)	6	40	5	51
Mutual Funds	10	16	11	37
Corporate Bonds	0	1	0	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,133,977.2	3,190,763.5	
	Mn USD	37,699.7	38,382.8	-1.8%
Turnover	Mn BDT	2,628.1	2,867.8	
	Mn USD	31.6	34.5	-8.4%
Volume	Mn Shares	115.1	114.2	0.8%
Trade		108,832	115,785	-6.0%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	316.2	12.3%	45.88	9.1x	7.5x
British American Tobacco Bangladesh Company Limited	158.3	6.2%	38.08	18.4x	6.5x
Square Pharmaceuticals	137.4	5.4%	79.14	10.7x	2.1x
United Power Generation & Distribution Company Ltd	134.8	5.3%	28.90	15.9x	9.2x
Renata Ltd.	93.0	3.6%	10.54	23.6x	5.1x
Berger Paints	58.9	2.3%	5.13	25.4x	8.8x
BRAC Bank	58.7	2.3%	57.82	11.4x	1.5x
Investment Corporation of Bangladesh	49.9	1.9%	.70	NM	2.4x
Marico Bangladesh Limited	49.5	1.9%	1.23	19.8x	33.6x
LafargeHolcim Bangladesh Limited	46.7	1.8%	185.54	25.9x	3.1x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	90.1	8.6%	79.14	10.7x	2.1x
Renata Ltd.	45.4	4.4%	10.54	23.6x	5.1x
British American Tobacco Bangladesh Company Limited	41.9	4.0%	38.08	18.4x	6.5x
BRAC Bank	32.7	3.1%	57.82	11.4x	1.5x
Grameenphone Ltd.	31.6	3.0%	45.88	9.1x	7.5x
Olympic Industries	25.1	2.4%	22.26	17.8x	5.5x
Beximco Pharmaceuticals	20.0	1.9%	10.91	7.3x	0.8x
Eastern Bank	17.1	1.6%	1.17	7.6x	1.0x
Pubali Bank	16.8	1.6%	2.06	6.4x	0.8x
LafargeHolcim Bangladesh Limited	16.5	1.6%	185.54	25.9x	3.1x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Bank Asia Ltd.	17.70	17.70	35.40	2,000,000	1
Bangladesh National Insurance Company Limited	23.00	23.00	0.63	27,500	1
BRAC Bank	47.50	47.50	11.88	250,000	1
Bangladesh Steel Re-Rolling Mills Limited	40.80	40.80	6.77	166,000	2
Navana CNG Limited	37.40	37.40	1.46	39,000	1
Olympic Industries	155.90	155.80	7.45	47,800	3
Phoenix Finance	21.70	21.70	2.58	119,000	1
Renata Ltd.	1,050.00	1,050.00	14.60	13,900	2
SEML Lecture Equity Management Fund	5.70	5.70	0.86	150,000	1
SK Trims & Industries Limited	44.10	44.10	5.51	125,000	2
Square Pharmaceuticals	184.00	184.00	7.36	40,000	1
Uttara Bank	27.20	27.20	29.92	1,100,000	30