

Daily Market Update

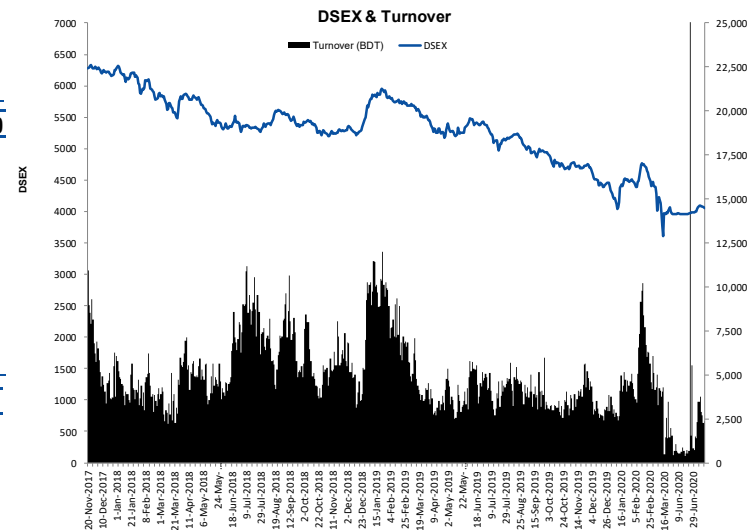
The market closed in red today. The benchmark index DSEX (-0.45%) lost 18.46 points and closed at 4,050.65. The blue-chip index DS30 (-0.89%), the Shariah-based index DSES (-0.72%), and the large cap index CDSET (-0.13%) closed at 1,356.64, 938.97, and 804.25 points respectively. All the large cap sectors posted positive performance today except Engineering (-0.13%) and Pharmaceutical (-1.25%). Telecommunication booked the highest gain of 0.62% followed by Food & Allied (+0.21%), Bank (+0.18%), NBFi (+0.02%) and Fuel & Power (+0.00%). Block trade contributed 21.5% of the overall market turnover. Beximco Pharmaceuticals Ltd. (-4.7%) was the most traded share with a turnover of BDT 124 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap (mn BDT)	% of Total Mcap	Sectoral Turnover (mn BDT)	% of Total Turnover
Banks	1,139.70	1,137.63	2.07	0.18%	30	464,540.9	17.91%	156.5	8.51%
NBFIs	1,364.73	1,364.45	0.28	0.02%	23	126,168.9	4.86%	24.7	1.34%
Mutual Funds	568.03	569.09	-1.06	-0.19%	37	29,519.5	1.14%	21.0	1.14%
General Insurance	1,750.47	1,729.50	20.98	1.21%	35	47,294.6	1.82%	437.1	23.77%
Life Insurance	1,836.59	1,817.76	18.83	1.04%	12	51,206.7	1.97%	86.4	4.70%
Telecommunication	3,422.53	3,401.51	21.02	0.62%	2	343,988.0	13.26%	128.3	6.98%
Pharmaceuticals	2,480.05	2,511.51	-31.47	-1.25%	32	467,489.8	18.02%	484.7	26.35%
Fuel & Power	1,434.83	1,434.80	0.03	0.00%	19	355,692.8	13.71%	60.5	3.29%
Cement	1,182.07	1,182.23	-0.17	-0.01%	7	71,888.0	2.77%	1.1	0.06%
Services & Real Estate	950.23	950.94	-0.71	-0.07%	8	37,938.0	1.46%	3.1	0.17%
Engineering	2,026.03	2,028.60	-2.57	-0.13%	39	131,466.6	5.07%	115.0	6.25%
Food & Allied	11,333.55	11,310.25	23.30	0.21%	17	209,292.3	8.07%	72.1	3.92%
IT	1,778.16	1,805.59	-27.44	-1.52%	9	19,659.7	0.76%	52.9	2.88%
Textiles	950.50	958.86	-8.35	-0.87%	56	95,936.7	3.70%	69.4	3.77%
Paper & Printing	5,041.61	5,096.26	-54.66	-1.07%	3	9,639.1	0.37%	39.7	2.16%
Tannery	1,667.26	1,667.41	-0.14	-0.01%	6	17,849.2	0.69%	.6	0.03%
Jute	7,920.71	7,925.62	-4.91	-0.06%	3	1,750.5	0.07%	1.5	0.08%
Ceramics	389.73	389.73	0.00	0.00%	5	19,760.8	0.76%	2.7	0.15%
Miscellaneous	1,670.14	1,675.22	-5.08	-0.30%	13	92,670.6	3.57%	81.9	4.45%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Eastern Insurance	48.70	9.7%	87.7
Pragati Insurance	35.70	9.5%	2.5
Asia Insurance Limited	21.30	8.7%	21.2
Zeal Bangla Sugar Mills	53.50	7.9%	1.9
Takaful Insurance	34.40	7.8%	9.4
Republic Insurance	24.70	6.0%	23.9
Pragati Life Insurance	97.10	4.7%	17.2
Bangladesh National Insurance Company Limited	20.70	4.5%	11.5
Dhaka Insurance Limited	28.30	3.7%	5.1
Dulamia Cotton	49.60	3.1%	.3

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
GQ Ball Pen	97.00	-9.9%	37.9
Beacon Pharmaceuticals Limited	66.90	-9.8%	53.8
Paramount Textile Limited	51.00	-8.9%	48.1
Hakkani Pulp & Paper	74.70	-6.9%	39.3
Fine Foods Ltd	52.60	-6.7%	40.9
Midas Financing Ltd.	10.10	-6.5%	2.0
Bangladesh Submarine Cable Company Limited	87.20	-5.6%	64.3
Dacca Dyeing	3.60	-5.3%	.4
Genex Infosys Limited	56.10	-5.2%	42.1
Tung Hai Knitting & Dyeing Limited	1.90	-5.0%	.0

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Beximco Pharmaceuticals	70.80	-4.7%	124.1
Square Pharmaceuticals	174.60	-1.1%	92.4
Eastern Insurance	48.70	9.7%	87.7
Pioneer Insurance	33.50	-0.9%	73.1
Nahee Aluminium Composite Panel Ltd.	52.20	-1.7%	72.5
Indo-Bangla Pharmaceuticals Limited	20.50	-4.7%	64.8
Bangladesh Submarine Cable Company Limited	87.20	-5.6%	64.3
Grameenphone Ltd.	244.10	0.9%	64.0
Beacon Pharmaceuticals Limited	66.90	-9.8%	53.8
Paramount Textile Limited	51.00	-8.9%	48.1



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,050.65	4,069.11	-18.46	-0.45%	-9.03%
DS30	1,356.64	1,368.76	-12.12	-0.89%	-10.35%
DSES	938.97	945.81	-6.84	-0.72%	-6.09%
CDSET	804.25	805.31	-1.06	-0.13%	-10.62%

	Advanced	Declined	Unchanged	Total
All Category	49	80	201	330
A Category (Equity)	42	58	141	241
B Category (Equity)	1	14	29	44
N Category (Equity)	0	0	1	1
Z Category (Equity)	6	8	30	44
Mutual Funds	1	6	27	34
Corporate Bonds	1	1	0	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,150,870.1	3,154,774.5	
	Mn USD	37,086.5	37,132.5	-0.1%
Turnover	Mn BDT	2,344.5	2,259.7	3.8%
	Mn USD	27.6	26.6	
Volume	Mn Shares	77.4	71.1	8.8%
Trade		54,107	55,335	-2.2%

Top Ten Market Cap	Mcap (bn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	329.6	12.7%	63.98	9.5x	7.8x
British American Tobacco Bangladesh Company Limited	163.4	6.3%	1.35	19.0x	6.7x
Square Pharmaceuticals	147.4	5.7%	92.37	11.1x	2.2x
United Power Generation & Distribution Company Ltd	116.0	4.5%	.04	14.3x	7.9x
Renata Ltd.	91.7	3.5%	4.21	22.7x	5.0x
Berger Paints	60.7	2.3%	1.31	24.9x	9.1x
Investment Corporation of Bangladesh	52.5	2.0%	4.83	NM	2.5x
Marico Bangladesh Limited	49.2	1.9%	.01	18.9x	33.4x
BRAC Bank	42.3	1.6%	.28	8.6x	0.9x
LafargeHolcim Bangladesh Limited	41.7	1.6%	.74	23.9x	2.7x

Top Ten Free Float Mcap	Free Float Mcap (bn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	96.4	9.2%	92.37	11.1x	2.2x
Renata Ltd.	44.8	4.3%	4.21	22.7x	5.0x
British American Tobacco Bangladesh Company Limited	43.2	4.1%	1.35	19.0x	6.7x
Grameenphone Ltd.	33.0	3.1%	63.98	9.5x	7.8x
Beximco Pharmaceuticals	24.9	2.4%	124.06	8.8x	1.0x
BRAC Bank	23.6	2.2%	.28	8.6x	0.9x
Olympic Industries	22.3	2.1%	3.22	15.4x	4.9x
Eastern Bank	17.3	1.6%	.04	6.3x	0.9x
Islami Bank	16.6	1.6%	39.42	5.9x	0.5x
National Bank	15.1	1.4%	11.47	5.3x	0.4x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Bank Asia Ltd.	16.70	16.70	7.24	433,473	1
British American Tobacco Bangladesh Company Limited	870.00	867.00	1.91	2,200	3
BSRM Steel	33.60	33.60	0.56	16,600	1
City Bank	16.20	16.20	12.34	761,929	1
Confidence Cement	88.00	88.00	0.62	7,000	1
Eastern Bank	30.90	30.90	145.23	4,700,000	2
Fine Foods Ltd	56.30	56.30	1.58	28,000	1
Grameenphone Ltd.	235.00	235.00	0.59	2,500	1
Grameen One Scheme Two	12.00	12.00	0.77	64,000	1
Islami Bank	21.70	21.70	217.00	10,000,00	3
Khulna Power Company Limited	45.50	44.70	1.16	25,800	2
LafargeHolcim Bangladesh Limited	35.90	35.90	0.56	15,500	1
Nahee Aluminium Composite Panel Ltd.	55.00	55.00	0.61	11,000	1
National Bank	7.50	7.50	6.17	822,452	1
New Line Clothings Limited	12.90	12.70	4.90	383,000	5
Nurani Dyeing & Sweater Limited	7.70	7.70	0.78	101,150	1
Oimex Electrode Limited	24.20	24.20	7.26	300,000	2
One Bank	8.30	8.30	0.58	70,000	1
Phoenix Finance	24.00	24.00	1.85	77,000	1
Progressive Life Ins	115.00	113.00	22.38	196,300	2
Pubali Bank	20.90	20.90	5.62	269,044	1
Silco Pharmaceuticals Limited	21.00	21.00	0.51	24,500	1
Simtex Industries Limited	14.60	14.60	3.89	266,484	4
Singer Bangladesh	146.30	132.30	7.28	53,861	10
SK Trims & Industries Limited	62.00	60.10	11.67	188,400	2
Sonar Bangla Ins	37.30	37.30	7.37	197,579	1
Square Pharmaceuticals	175.00	175.00	8.45	48,278	1
Standard Ceramic	289.90	289.90	0.50	1,740	1
Standard Insurance	36.30	36.00	1.12	30,900	2
United Power Generation & Distribution Company Ltd	203.00	201.00	3.93	19,500	4

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
VFS Thread Dyeing Limited	22.70	22.70	20.43	900,000	1
Total			504.83		60

REPUBLIC

The Board of Directors has recommended 7% cash and 7% stock dividend for the year ended on December 31, 2019. Date of AGM: 03.09.2020, Time: 12:00 noon, Venue: Digital Platform. Record Date: 10.08.2020. The Company has also reported EPS of Tk. 2.02, NAV per share of Tk. 15.49 and NOCFPS of Tk. 2.24 for the year ended on December 31, 2019 as against Tk. 1.41 (restated), Tk. 14.82 and Tk. (0.28) respectively for the same period of the previous year. The Company has further informed that reasons for declaration of stock dividend: 1) To increase paid up Capital of the Company. 2) To comply with Government directives in respect of threshold limit of investment in treasury bond, the company increases its investment in treasury bond by Tk. 1.5 crore from January 01, 2020 to June 30, 2020. and To increase the financial strength of the company and smooth future returns for shareholders, the company desires to increase investment in FDR from January 01, 2019 to June 30, 2020, the investment in FDR of the company increased by 5.7 crore.

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
CITYBANK	The City Bank Ltd.		0.0%	15.0%	31-Dec-19	13-Jul-20
DHAKABANK	Dhaka Bank Limited		5.0%	5.0%	31-Dec-19	14-Jul-20
LANKABAFIN	LankaBangla Finance		5.0%	7.0%	31-Dec-19	16-Jul-20
ONEBANKLTD	One Bank		5.0%	5.0%	31-Dec-19	16-Jul-20

Important DSE News

ABBANK
(Q2 Un-audited): Consolidated EPS was Tk. 0.10 for April-June 2020 as against Tk. 0.05 for April-June 2019; Consolidated EPS was Tk. 0.19 for January-June 2020 as against Tk. 0.15 for January-June 2019. Consolidated NOCFPS was Tk. (36.81) for January-June 2020 as against Tk. 8.57 for January-June 2019. Consolidated NAV per share was Tk. 31.80 as on June 30, 2020 and Tk. 31.66 as on June 30, 2019.

NTC

(Q3 Un-audited): EPS was Tk. (41.83) for January-March 2020 as against Tk. (17.86) for January-March 2019; EPS was Tk. (35.21) for July 2019-March 2020 as against Tk. 9.69 for July 2018-March 2019. NOCFPS was Tk. (16.59) for July 2019-March 2020 as against Tk. 21.59 for July 2018-March 2019. NAV per share was Tk. 137.25 as on March 31, 2020 and Tk. 174.66 as on June 30, 2019. The Company has also informed that decreasing in EPS is due to decrease in turnover significantly during the period. The reason for decreasing in turnover is due to decrease in auction price. However, the company is trying to minimize this risk of price fluctuation.

ISLAMIBANK

(Q1 Un-audited): Consolidated EPS was Tk. 0.43 for January-March 2020 as against Tk. 0.40 for January-March 2019. Consolidated NOCFPS was Tk. 12.59 for January-March 2020 as against Tk. 15.52 for January-March 2019. Consolidated NAV per share was Tk. 37.31 as on March 31, 2020 and Tk. 34.87 as on March 31, 2019.

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PURABIGEN

(Q1 Un-audited): EPS was Tk. 0.25 for January-March 2020 as against Tk. 0.21 for January-March 2019. NOCFPS was Tk. 0.11 for January-March 2020 as against Tk. 0.13 for January-March 2019. NAV per share was Tk. 13.14 as on March 31, 2020 and Tk. 13.27 as on March 31, 2019.

SAMORITA

(Q3 Un-audited): EPS was Tk. 0.12 for January-March 2020 as against Tk. 0.37 for January-March 2019; EPS was Tk. 1.19 for July 2019-March 2020 as against Tk. 1.32 for July 2018-March 2019. NOCFPS was Tk. 1.79 for July 2019-March 2020 as against Tk. 2.14 for July 2018-March 2019. NAV per share was Tk. 50.22 as on March 31, 2020 and Tk. 50.05 as on June 30, 2019.