

## Daily Market Update

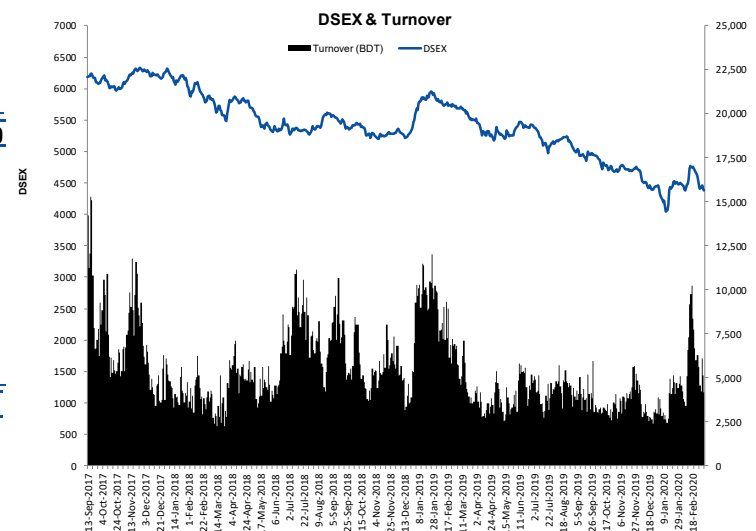
Market closed in red today. The benchmark index DSEX (-0.57%) lost 25.14 points and closed at 4,384.48 points. The blue chip index DS30 (-0.54%), the Shariah-based index DSES (-0.75%), and the large cap index CDSET (-0.92%) all closed in red. All the large cap sectors showed negative performance today. Telecommunication experienced the highest loss of 2.17% followed by NBFIs (-1.61%), Fuel & Power (-1.18%), Food & Allied (-0.91%), Pharmaceuticals (-0.52%), Banks (-0.23%) and Engineering (-0.13%). Turnover stood at BDT 4.2 billion (USD 49.9 million). LafargeHolcim Bangladesh Limited (-2.3%) was the most traded share with a turnover of BDT 138.6 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,178.13	1,180.91	-2.77	-0.23%	30	480,208.4	17.17%	199.9	4.89%
NBFIs	1,528.49	1,553.57	-25.08	-1.61%	23	141,307.9	5.05%	85.8	2.10%
Mutual Funds	630.39	638.28	-7.88	-1.24%	37	32,760.4	1.17%	75.5	1.85%
General Insurance	1,772.90	1,792.09	-19.19	-1.07%	35	47,900.4	1.71%	109.8	2.69%
Life Insurance	2,011.77	2,027.96	-16.18	-0.80%	12	56,091.2	2.01%	79.0	1.93%
Telecommunication	3,697.04	3,778.99	-81.95	-2.17%	2	371,578.3	13.28%	65.4	1.60%
Pharmaceuticals	2,560.63	2,573.95	-13.32	-0.52%	32	482,679.1	17.26%	798.7	19.53%
Fuel & Power	1,559.75	1,578.33	-18.58	-1.18%	19	386,659.7	13.82%	330.0	8.07%
Cement	1,366.11	1,392.08	-25.98	-1.87%	7	83,080.5	2.97%	177.9	4.35%
Services & Real Estate	1,025.28	1,022.01	3.26	0.32%	8	40,934.0	1.46%	105.2	2.57%
Engineering	2,352.67	2,355.62	-2.95	-0.13%	39	152,780.4	5.46%	604.0	14.77%
Food & Allied	12,341.48	12,455.13	-113.65	-0.91%	17	227,905.5	8.15%	140.1	3.42%
IT	2,051.01	2,067.50	-16.49	-0.80%	9	22,676.4	0.81%	118.1	2.89%
Textiles	1,126.01	1,126.14	-0.12	-0.01%	56	113,651.3	4.06%	621.2	15.19%
Paper & Printing	5,966.60	5,834.23	132.38	2.27%	3	11,407.6	0.41%	124.7	3.05%
Tannery	1,879.49	1,874.78	4.71	0.25%	6	20,121.3	0.72%	84.2	2.06%
Jute	9,624.28	9,353.19	271.08	2.90%	3	2,127.0	0.08%	61.5	1.51%
Ceramics	421.17	420.06	1.12	0.27%	5	21,354.9	0.76%	72.1	1.76%
Miscellaneous	1,838.56	1,805.19	33.38	1.85%	13	102,016.1	3.65%	236.3	5.78%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Sinobangla Industries	60.70	10.0%	69.6
Hakkani Pulp & Paper	87.30	9.7%	71.4
Khulna Printing & Packaging Limited	19.50	9.6%	47.1
In Tech Online Ltd.	20.70	9.5%	15.8
BD Autocars	165.10	9.4%	33.3
M.L. Dyeing Limited	59.00	9.3%	48.2
Olympic Accessories Limited	8.30	9.2%	17.5
Chittagong Vegetable	138.90	8.8%	76.2
Paramount Insurance	40.20	8.4%	14.0
Central Pharmaceuticals Limited	16.70	7.7%	55.9

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Tung Hai Knitting & Dyeing Limited	2.10	-8.7%	.1
International Leasing	3.40	-8.1%	11.8
Bay Leasing	12.10	-7.6%	3.2
Midas Financing Ltd.	11.50	-6.5%	2.7
City General Insurance	16.00	-6.4%	6.7
Zeal Bangla Sugar Mills	37.40	-6.3%	.0
CAPM BDBL Mutual Fund 01	8.20	-5.7%	.6
GPH Ispat Limited	27.00	-5.6%	7.0
Saiham Textile	32.50	-5.5%	30.9
Premier Leasing	5.30	-5.4%	2.5

Most Traded Share	Close	Δ%	Turnover (mn BDT)
LafargeHolcim Bangladesh Limited	42.30	-2.3%	138.6
Orion Pharma Ltd.	42.40	-3.6%	84.0
Nahee Aluminium Composite Panel Ltd.	49.70	6.2%	79.3
Beacon Pharmaceuticals Limited	63.20	7.5%	76.6
Chittagong Vegetable	138.90	8.8%	76.2
Orion Infusion	80.80	-3.7%	75.7
BRAC Bank	38.50	2.1%	75.2
VFS Thread Dyeing Limited	29.30	-4.2%	73.9
Hakkani Pulp & Paper	87.30	9.7%	71.4
Sinobangla Industries	60.70	10.0%	69.6



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,384.48	4,409.62	-25.14	-0.57%	-1.54%
DS30	1,462.25	1,470.11	-7.87	-0.54%	-3.38%
DSES	1,015.93	1,023.60	-7.67	-0.75%	1.61%
CDSET	864.51	872.57	-8.06	-0.92%	-3.92%

	Advanced	Declined	Unchanged	Total
All Category	0	105	213	318
A Category (Equity)	0	61	170	231
B Category (Equity)	0	22	24	46
N Category (Equity)	0	0	1	1
Z Category (Equity)	0	22	18	40
Mutual Funds	0	0	24	24
Corporate Bonds	0	0	2	2

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	3,367,470.6	3,389,340.9	
	Mn USD	40,508.5	40,771.6	-0.6%
Turnover	Mn BDT	4,151.4	5,106.7	
	Mn USD	49.9	61.4	-18.7%
Volume	Mn Shares	156.4	222.9	-29.8%
Trade		155,318	155,318	0.0%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	356.2	12.7%	51.86	10.3x	8.4x
British American Tobacco Bangladesh Company Limited	176.4	6.3%	26.99	20.5x	7.3x
Square Pharmaceuticals	156.4	5.6%	68.00	11.8x	2.4x
United Power Generation & Distribution Company Ltd	127.4	4.6%	34.05	15.7x	8.7x
Renata Ltd.	95.9	3.4%	4.70	23.7x	5.3x
Berger Paints	64.9	2.3%	10.25	26.7x	9.7x
Investment Corporation of Bangladesh	60.9	2.2%	2.32	NM	2.9x
Marico Bangladesh Limited	50.9	1.8%	7.57	19.5x	34.6x
LafargeHolcim Bangladesh Limited	49.1	1.8%	138.64	27.3x	3.2x
BRAC Bank	47.5	1.7%	75.17	9.2x	1.2x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	102.5	9.0%	68.00	11.8x	2.4x
Renata Ltd.	46.9	4.1%	4.70	23.7x	5.3x
British American Tobacco Bangladesh Company Limited	46.6	4.1%	26.99	20.5x	7.3x
Grameenphone Ltd.	35.6	3.1%	51.86	10.3x	8.4x
BRAC Bank	26.5	2.3%	75.17	9.2x	1.2x
Olympic Industries	25.0	2.2%	2.89	17.3x	5.5x
Beximco Pharmaceuticals	24.3	2.1%	11.30	8.6x	1.0x
Eastern Bank	18.6	1.6%	3.03	8.3x	1.1x
LafargeHolcim Bangladesh Limited	17.4	1.5%	138.64	27.3x	3.2x
Pubali Bank	16.4	1.4%	2.04	6.3x	0.8x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
British American Tobacco Bangladesh Company Limited	982.50	982.50	14.74	15,000	4
Central Pharmaceuticals Limited	16.20	16.20	2.22	137,000	1
Dulamia Cotton	55.00	55.00	5.50	100,000	1
First Finance Limited	5.30	5.30	6.67	1,258,857	2
Mercantile Insurance	32.00	32.00	2.88	90,000	1
M.L. Dyeing Limited	58.00	58.00	1.74	30,000	2
Saiham Cotton Mills Limited	22.10	22.10	9.95	450,000	1
Uttara Bank	23.80	23.80	16.66	700,000	2
VFS Thread Dyeing Limited	32.30	32.30	1.55	48,000	1

**Corporate Actions: Upcoming Record Dates**

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
GBBPOWER	GBB Power Ltd.	0.0%	5.0%	30-Jun-2020	5-Mar-2020	
NITOLINSU	Nitol Insurance Co. Ltd	0.0%	15.0%	31-Dec-2019	8-Mar-2020	
SINGERBAN	Singer Bangladesh Limited	0.0%	77.0%	31-Dec-2019	9-Mar-2020	
RELIANCEI	Reliance Insurance Ltd.	0.0%	25.0%	31-Dec-2019	11-Mar-2020	
DELTABRAC	Delta Brac Housing Finance Corp. Ltd.	15.0%	20.0%	31-Dec-2019	11-Mar-2020	
BRITISHAM	British American Tobacco Bangladesh Limited	0.0%	400.0%	31-Dec-2019	12-Mar-2020	
UNITEDFIN	United Finance Ltd.	0.0%	10.0%	31-Dec-2019	12-Mar-2020	
LINDEBANG	Linde Bangladesh Limited	0.0%	500.0%	31-Dec-2019	12-Mar-2020	

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
IDLCFINAN	IDLC Finance Limited		0.0%	35.0%	31-Dec-2019	12-Mar-2020
PRIMEINSU	Prime Insurance Company Ltd.		0.0%	0.0%	31-Dec-2019	12-Mar-2020
IPDCFINAN	IPDC Finance Limited		5.0%	10.0%	31-Dec-2019	15-Mar-2020
GLAXOSMITH	GlaxoSmithKline Bangladesh Limited		0.0%	530.0%	31-Dec-2019	16-Mar-2020

**Important DSE News**
**SKTRIMS**

Global Max Packaging Industries Limited, one of the Corporate Directors of the Company, has expressed its intention to buy 2,32,000 shares of the Company at prevailing market price (In the Public market) through Stock Exchange (DSE) within next 30 working days, as per Rule-4 of the BSEC (Substantial Acquisition of shares and Takeovers), Rules, 2018.

**EXCH**

Commencement of Bidding of Walton Hi-Tech Industries Limited through Book Building Method: The bidding period for eligible investors to determine the cut-off price of shares of Walton Hi-Tech Industries Limited through electronic subscription system (ESS) of the Exchanges will commence from 5:00 p.m. on March 02, 2020 and will continue till 5:00 p.m. on March 05, 2020 (round the clock) and valuation report submission period for eligible investors through electronic subscription system (ESS) of the Exchanges will start at 10:30 a.m. on March 08, 2020 and continue till 10:30 a.m. on March 10, 2020 (round the clock). Each EI who intends to participate in the electronic bidding shall maintain a minimum investment of Tk. 1.00 crore only in listed securities as on the end of 23rd of February, 2020 as per clause (c) of sub-rule (1) of rule 2 of the Bangladesh Securities and Exchange Commission (Public Issue) Rules, 2015; which is in accordance with the BSEC consent letter to Walton Hi-Tech Industries Limited Ref: BSEC/CI/BB-19/2018/16 dated January 29, 2020. Participating EIs will be required to pay full bid amount (100%) and bidding fee Tk. 5,000.00 (five thousand only) through IFIC Bank Limited (A/C Name: Dhaka Stock Exchange Limited, A/C No.: 1090344039042) in between 10:00 a.m. of March 02, 2020 to 2:00 p.m. of March 05, 2020 (during banking hour).

Commencement of Bidding of Delta Hospital Limited through Book Building Method: The bidding period for eligible investors to determine the cut-off price of shares of Delta Hospital Limited through Electronic Subscription System (ESS) of the Exchanges will commence from 5:00 p.m. on March 22, 2020 and will continue till 5:00 p.m. on March 25, 2020 (round the clock) and valuation report submission period for eligible investors through ESS will start at 10:30 a.m. on March 29, 2020 and continue till 10:30 a.m. on March 31, 2020 (round the clock). Each Eligible Investor (EI) who intends to participate in the electronic bidding to determine the cut-off price of ordinary shares of Delta Hospital Limited shall require to maintain a minimum investment of Tk. 1.00 crore only at market price in the listed securities as on March 11, 2020 (day-end) as per Rule 2(1)(e) of the Bangladesh Securities and Exchange Commission (Public Issue) Rules, 2015; which is in accordance with the BSEC consent letter to Delta Hospital Limited Ref: BSEC/CI/BB-13/2017/54 dated February 27, 2020. The Central Depository Bangladesh Limited (CDBL) shall send a report to the exchange regarding the holding of EIs in the listed securities and the exchange shall ensure the compliance in this regard. Participating EIs will be required to pay fullbid amount (100%) and bidding fee Tk. 5,000.00 (five thousand only) through The City Bank Limited (A/C Name: Dhaka Stock Exchange Limited, A/C No.: 1121063938001) in between 10:00 a.m. of March 22,

2020 to 2:00 p.m. of March 25, 2020 (during banking hour).

**LHBL**

The Board of Directors has recommended 10% Cash dividend for the year ended on December 31, 2019. Date of AGM: 07.05.2020, Time: 10:30 AM, Venue: To be notified later. Record Date: 01.04.2020. The Company has also reported Consolidated EPS of Tk. 1.50, Consolidated NAV per share of Tk. 13.95 and Consolidated NOCFPS of Tk. 3.52 for the year ended on December 31, 2019 as against Tk. 0.96, Tk. 13.41 and Tk. 2.68 for the same period of the previous year.

**AGRANINS**

The Company has informed that Mr. Anwar Mirza, Sponsor of the company passed away on 28.12.2018. His total holding of 10,71,656 shares will be transmitted in the accounts of his successors in the following manner as per succession certificate issued by the Honorable Court: (1) 1,33,957 shares to Mrs. Sajeda Mirza (wife), (2) 2,67,914 shares each to his 2 sons namely D. Shibli Mirza and Mr. A. R. Hasan Mirza and 1,33,957 shares each to his three daughters namely Mrs. Silvana Mirza, Mrs. Samina Mirza and Mrs. Farhana Mirza.