

Daily Market Update

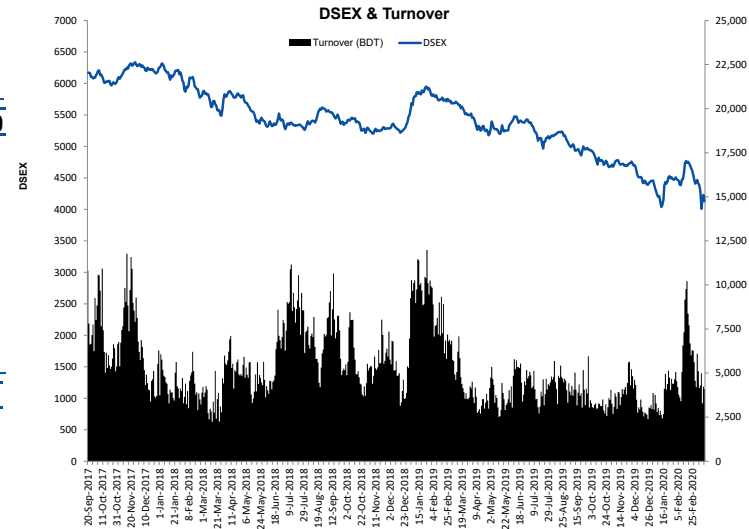
Market closed in red today. The benchmark index DSEX (-3.89%) lost 160.65 points and closed at 3,969.31 points. The blue chip index DS30 (-3.50%), the Shariah-based index DSES (-3.28%), and the large cap index CDSET (-3.24%) all closed in red. All the large cap sectors showed negative performance today. NBFIs experienced the highest loss of 6.60% followed by Engineering (-5.44%), Food & Allied (-5.38%), Power (-3.61%), Banks (-3.42%), Telecommunication (-2.87%) and Pharmaceuticals (-2.27%). Turnover stood at BDT 3.7 billion (USD 45.0 million). Mono Ceramic (+6.9%) was the most traded share with a turnover of BDT 131.4 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,071.37	1,109.34	-37.97	-3.42%	30	436,691.6	17.17%	281.6	7.95%
NBFIs	1,348.90	1,444.25	-95.36	-6.60%	23	124,704.7	4.90%	104.3	2.95%
Mutual Funds	567.38	591.39	-24.01	-4.06%	37	29,485.6	1.16%	60.8	1.72%
General Insurance	1,533.74	1,628.64	-94.90	-5.83%	35	41,439.0	1.63%	103.8	2.93%
Life Insurance	1,737.29	1,824.14	-86.85	-4.76%	12	48,438.2	1.90%	45.4	1.28%
Telecommunication	3,368.97	3,468.36	-99.40	-2.87%	2	338,604.5	13.32%	125.0	3.53%
Pharmaceuticals	2,442.98	2,499.60	-56.62	-2.27%	32	460,502.9	18.11%	737.9	20.83%
Fuel & Power	1,425.94	1,479.39	-53.45	-3.61%	19	353,488.5	13.90%	279.8	7.90%
Cement	1,187.09	1,252.91	-65.83	-5.25%	7	72,193.4	2.84%	100.8	2.85%
Services & Real Estate	954.20	985.51	-31.31	-3.18%	8	38,096.4	1.50%	90.5	2.55%
Engineering	2,024.33	2,140.76	-116.43	-5.44%	39	131,356.2	5.17%	488.7	13.80%
Food & Allied	11,340.43	11,985.05	-644.62	-5.38%	17	209,419.4	8.24%	172.8	4.88%
IT	1,763.98	1,863.96	-99.98	-5.36%	9	19,503.0	0.77%	66.5	1.88%
Textiles	952.79	1,016.35	-63.57	-6.25%	56	96,167.4	3.78%	395.9	11.18%
Paper & Printing	5,058.04	5,418.03	-360.00	-6.64%	3	9,670.5	0.38%	51.1	1.44%
Tannery	1,679.15	1,749.21	-70.06	-4.01%	6	17,976.5	0.71%	69.5	1.96%
Jute	8,008.03	8,670.86	-662.83	-7.64%	3	1,769.8	0.07%	34.4	0.97%
Ceramics	393.58	408.65	-15.07	-3.69%	5	19,955.8	0.78%	162.2	4.58%
Miscellaneous	1,684.99	1,732.45	-47.46	-2.74%	13	93,494.7	3.68%	170.9	4.82%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
International Leasing	4.40	10.0%	23.9
Monno Ceramic	131.00	6.9%	131.4
Apex Spinning & Knitting Mills Limited	138.60	2.8%	20.1
Aziz Pipes Ltd.	99.30	2.6%	10.3
Matin Spinning Mills Ltd.	34.90	1.7%	.0
Green Delta Mutual Fund	6.70	1.5%	.1
Bangladesh General Insurance Co.	22.90	0.9%	.7
Sea Pearl Beach Resort & Spa Limited	80.70	0.6%	52.7
Prime Islami Life Ins	48.50	0.6%	.5
Shahjalal Islami Bank	19.50	0.5%	1.6

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Appollo Ispat Complex Limited	2.70	-10.0%	2.5
Prime Finance First MF	11.80	-9.9%	7.9
IDLC Finance Ltd.	42.10	-9.9%	5.5
Shaympur Sugar	23.90	-9.8%	.2
Agrani Insurance Co. Ltd.	17.50	-9.8%	6.0
Zeal Bangla Sugar Mills	32.30	-9.8%	.1
Meghna Cement	70.40	-9.7%	1.1
Sonargaon Textiles	24.40	-9.6%	12.7
Samata Leather	107.00	-9.6%	16.3
Metro Spinning	8.50	-9.6%	13.4

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Monno Ceramic	131.00	6.9%	131.4
Grameenphone Ltd.	241.20	-2.7%	102.9
Orion Pharma Ltd.	44.00	-2.0%	92.9
Square Pharmaceuticals	177.40	-1.3%	87.2
British American Tobacco Bangladesh Company Limited	910.70	-5.4%	71.5
Summit Power	35.30	-2.8%	64.9
LafargeHolcim Bangladesh Limited	36.10	-4.0%	64.5
Orion Infusion	73.80	-6.1%	57.3
BRAC Bank	32.10	-6.1%	56.8
National Tubes	104.00	-6.3%	56.3



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	3,969.31	4,129.96	-160.65	-3.89%	-10.86%
DS30	1,333.28	1,381.59	-48.31	-3.50%	-11.90%
DSES	926.41	957.79	-31.38	-3.28%	-7.34%
CDSET	788.65	815.04	-26.39	-3.24%	-12.35%

	Advanced	Declined	Unchanged	Total
All Category	10	338	7	355
A Category (Equity)	7	247	4	258
B Category (Equity)	3	45	0	48
N Category (Equity)	0	1	0	1
Z Category (Equity)	0	45	3	48
Mutual Funds	1	34	2	37
Corporate Bonds	0	1	1	2

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,111,136.7	3,213,625.7	-3.2%
	Mn USD	37,425.0	38,657.8	
Turnover	Mn BDT	3,736.9	4,094.2	-8.7%
	Mn USD	45.0	49.3	
Volume	Mn Shares	169.2	159.0	6.4%
Trade		135,688	135,688	0.0%

Top Ten Market Cap	Mcap (mn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	325.7	12.8%	102.95	9.4x	7.7x
British American Tobacco Bangladesh Company Limited	163.9	6.5%	71.49	19.0x	6.7x
Square Pharmaceuticals	149.8	5.9%	87.19	11.3x	2.3x
United Power Generation & Distribution Company Ltd	116.9	4.6%	22.45	14.4x	7.9x
Renata Ltd.	92.0	3.6%	12.87	22.7x	5.1x
Berger Paints	61.8	2.4%	11.05	25.4x	9.2x
Investment Corporation of Bangladesh	51.7	2.0%	5.80	NM	2.5x
Marico Bangladesh Limited	50.1	2.0%	19.78	19.2x	34.0x
LafargeHolcim Bangladesh Limited	41.9	1.7%	64.48	23.3x	2.7x
BRAC Bank	39.6	1.6%	56.80	7.7x	1.0x

Top Ten Free Float Mcap	Free Float Mcap (mn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	98.2	9.6%	87.19	11.3x	2.3x
Renata Ltd.	44.9	4.4%	12.87	22.7x	5.1x
British American Tobacco Bangladesh Company Limited	43.4	4.2%	71.49	19.0x	6.7x
Grameenphone Ltd.	32.6	3.2%	102.95	9.4x	7.7x
Olympic Industries	22.3	2.2%	12.79	15.4x	4.9x
Beximco Pharmaceuticals	22.1	2.2%	10.68	7.8x	0.9x
BRAC Bank	22.1	2.1%	56.80	7.7x	1.0x
Eastern Bank	17.5	1.7%	2.24	7.8x	1.1x
LafargeHolcim Bangladesh Limited	14.8	1.4%	64.48	23.3x	2.7x
Pubali Bank	14.8	1.4%	2.05	5.6x	0.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn)	Quantity	Trade
Beacon Pharmaceuticals Limited	59.20	59.20	39.88	673,682	2
Fortune Shoes Limited	18.40	18.40	0.64	35,000	1
IFIC Bank	9.90	9.90	145.47	14,693,963	1
LafargeHolcim Bangladesh Limited	41.00	41.00	0.53	13,000	1
Northern Jute	344.80	344.80	1.20	3,492	2
Paramount Insurance	38.00	38.00	3.80	100,000	1
SK Trims & Industries Limited	69.00	69.00	0.55	8,000	1
Sonar Bangla Ins	32.70	32.70	1.90	58,224	1
VFS Thread Dyeing Limited	24.00	24.00	0.70	29,000	1

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
GLAXOSMITH	GlaxoSmithKline Bangladesh Limited		0.0%	530.0%	31-Dec-2019	16-Mar-2020

Important DSE News

BATBC

PICTET LUX A/C THS KFFC (THS Kingsway Fund) has reported its intention to buy 5,25,000 shares of the Company, at prevailing market price (In the Block market) dated 09.03.2020 through Stock Exchange (CSE) within next 30 working days, as per Rule-4 of the BSEC (Substantial Acquisition of shares and Takeovers), Rules, 2018

MALEKSPIN

Ms. Saima Matin Chowdhury, one of the Directors of the Company, has expressed her intention to buy 5,00,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE& CSE) within next 30 working days.

SAG

Respected clients/investors, This is to notify that the ownership of Shah Mohammad Sagir & Co. Limited (DSE TREC # 171) is going to be transferred very soon. As such, you are requested to check and verify your own balance of different shares and cash in the portfolio statement against your BO Account and inform/lodge your valid claim(s), if any, with relevant supporting documents to the following addresses simultaneously: 1. The Chairman, Shah Mohammad Sagir & Co. Ltd., Suite # 401, Modhumita Bhaban (3rd Floor), 158-160, Motijheel C/A, Dhaka-1000; and 2. The Managing Director, Dhaka Stock Exchange Limited, DSE Tower, Plot # 46, Road # 21, Nikunja-2, Dhaka-1229. However, if you want to transmit your shares from the BO Account maintained with the said Company, you can do the same through opening Link Account. It is noted here that, any claim of clients/investors against the said company after March 25, 2020 shall in no way be entertained.

EXCH

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 full bid 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). Please visit the following website for bidding related updates: <https://www.essbangladesh.com>.