

Daily Market Update

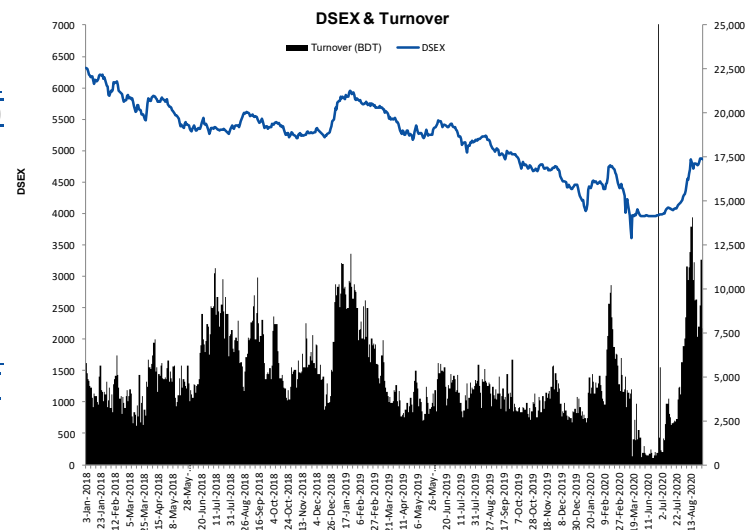
The market closed in red today. The benchmark index DSEX (-0.35%) lost 16.92 points and closed at 4,862.22. The blue-chip index DS30 (-0.18%), the Shariah-based index DSES (-0.13%), and the large-cap index CDSET (-0.34%) closed at 1,696.41, 1,131.38, and 991.27 points, respectively. All the large-cap sectors posted negative performance today except Telecommunication (+0.53%) and Power (+0.07%). Food & Allied experienced the highest loss of 1.96% followed by NBFIs (-0.80%), Bank (-0.58%), Pharmaceutical (-0.26%) and Engineering (-0.09%). Block trades contributed 3.1% of the overall market turnover. Beximco Pharmaceuticals Ltd. (+0.5%) was the most traded share with a turnover of BDT 627 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover (mn BDT)	% of Total Turnover
Banks	1,317.67	1,325.42	-7.74	-0.58%	30	537,104.4	17.11%	717.2	9.52%
NBFIs	1,801.67	1,816.17	-14.51	-0.80%	23	166,565.7	5.31%	443.0	5.88%
Mutual Funds	650.40	666.51	-16.11	-2.42%	37	33,800.3	1.08%	171.5	2.28%
General Insurance	2,406.49	2,345.84	60.65	2.59%	36	65,019.5	2.07%	594.7	7.89%
Life Insurance	1,981.18	2,039.33	-58.15	-2.85%	12	55,238.3	1.76%	93.3	1.24%
Telecommunication	4,512.66	4,488.67	23.99	0.53%	2	453,553.3	14.45%	272.1	3.61%
Pharmaceuticals	3,044.69	3,052.74	-8.05	-0.26%	32	573,929.4	18.29%	1,483.1	19.69%
Fuel & Power	1,713.06	1,711.85	1.21	0.07%	19	424,665.3	13.53%	604.1	8.02%
Cement	1,390.11	1,398.57	-8.46	-0.60%	7	84,540.4	2.69%	192.3	2.55%
Services & Real Estate	999.52	1,001.55	-2.03	-0.20%	8	39,905.8	1.27%	53.9	0.72%
Engineering	2,351.23	2,353.25	-2.02	-0.09%	39	152,568.6	4.86%	612.2	8.13%
Food & Allied	13,218.09	13,482.19	-264.11	-1.96%	17	244,094.8	7.78%	361.8	4.80%
IT	2,164.15	2,118.70	45.45	2.15%	9	23,927.3	0.76%	382.4	5.08%
Textiles	1,096.65	1,095.32	1.33	0.12%	56	110,688.3	3.53%	608.8	8.08%
Paper & Printing	6,144.60	6,194.55	-49.95	-0.81%	4	15,349.0	0.49%	44.3	0.59%
Tannery	1,749.13	1,762.47	-13.34	-0.76%	6	18,725.7	0.60%	76.7	1.02%
Jute	10,332.84	10,183.25	149.59	1.47%	3	2,283.6	0.07%	47.2	0.63%
Ceramics	434.25	440.44	-6.19	-1.41%	5	22,017.9	0.70%	78.3	1.04%
Miscellaneous	2,066.23	2,083.12	-16.88	-0.81%	13	114,648.8	3.65%	695.9	9.24%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Anlimayarn Deying Ltd.	35.20	10.0%	45.9
Anwar Galvanizing Ltd.	100.40	10.0%	73.1
Desh Garments	165.60	10.0%	15.9
Samata Leather	128.50	9.9%	33.2
Miracle Ind.	29.50	9.7%	45.7
Express Insurance Limited	28.10	9.3%	155.6
Sonargaon Textiles	29.40	9.3%	42.4
Savar Refractories	301.70	8.7%	1.9
BDCOM Online Ltd.	23.70	8.7%	108.3
BD Finance	13.80	8.7%	123.5

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Shaympur Sugar	67.50	-9.8%	5.0
Zeal Bangla Sugar Mills	188.00	-8.7%	5.1
ICB AMCL Third NRB Mutual Fund	6.40	-8.6%	6.4
NCCBL Mutual Fund - 1	6.20	-7.5%	1.7
IFIL Islamic Mutual Fund-1	6.30	-7.4%	1.4
Prime Bank 1st ICB AMCL Mutual Fund	6.70	-6.9%	2.0
United Airways (BD) Ltd.	1.40	-6.7%	1.6
ICB AMCL First Agrani Bank Mutual Fund	7.50	-6.3%	4.6
CAPM BDBL Mutual Fund 01	8.40	-5.6%	1.2
BD Welding	24.70	-5.5%	9.2

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Beximco Pharmaceuticals	116.10	0.5%	627.4
Beximco Limited	26.50	-0.7%	350.9
BRAC Bank	39.10	-1.5%	269.4
Grameenphone Ltd.	320.10	0.5%	206.5
Orion Pharma Ltd.	57.30	-2.2%	159.0
Express Insurance Limited	28.10	9.3%	155.6
Square Pharmaceuticals	216.60	-1.1%	141.2
LafargeHolcim Bangladesh Limited	43.90	-0.5%	139.1
British American Tobacco Bangladesh Company Limited	1,053.80	-2.0%	124.9
BD Finance	13.80	8.7%	123.5



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	4,862.22	4,879.15	-16.92	-0.35%	9.19%
DS30	1,696.41	1,699.55	-3.14	-0.18%	12.10%
DSES	1,131.38	1,132.85	-1.47	-0.13%	13.16%
CDSET	991.27	994.61	-3.34	-0.34%	10.17%

	Advanced	Declined	Unchanged	Total
All Category	139	179	37	355
A Category (Equity)	96	138	21	255
B Category (Equity)	26	10	10	46
N Category (Equity)	2	0	0	2
Z Category (Equity)	15	31	6	52
Mutual Funds	2	27	6	35
Corporate Bonds	0	2	0	2

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,687,942.2	3,698,344.9	-0.3%
	Mn USD	43,408.0	43,530.4	
Turnover	Mn BDT	7,774.3	11,667.8	-33.4%
	Mn USD	91.5	137.3	
Volume	Mn Shares	239.7	318.4	-24.7%
Trade		170,532	198,801	-14.2%

Top Twenty Market Cap	Mcap (Bn BDT)	% of Total Mcap	Turnover (mn BDT)	PE	PB
Grameenphone Ltd.	432.2	13.8%	206.50	12.7x	10.2x
British American Tobacco Bangladesh Company Limited	189.7	6.0%	124.93	21.9x	7.8x
Square Pharmaceuticals	182.9	5.8%	141.22	13.3x	2.8x
United Power Generation & Distribution Company Ltd	142.7	4.5%	103.30	19.9x	9.7x
Renata Ltd.	105.1	3.4%	22.63	24.5x	5.8x
Investment Corporation of Bangladesh	77.7	2.5%	14.97	NM	3.7x
Berger Paints	66.5	2.1%	11.00	27.5x	9.9x
Marico Bangladesh Limited	62.0	2.0%	6.61	22.2x	42.1x
BRAC Bank	51.8	1.7%	269.39	11.5x	1.2x
LafargeHolcim Bangladesh Limited	51.0	1.6%	139.10	28.3x	3.3x
Beximco Pharmaceuticals	47.1	1.5%	627.39	13.8x	1.7x
Summit Power	44.3	1.4%	75.69	7.8x	1.7x
Islami Bank	39.4	1.3%	21.26	7.1x	0.7x
Olympic Industries	35.8	1.1%	20.43	17.7x	5.7x
Dutch-Bangla Bank	35.4	1.1%	14.00	7.7x	1.1x
Titas Gas	35.2	1.1%	9.12	9.0x	0.5x
Eastern Bank	30.0	1.0%	2.31	7.5x	1.1x
Glaxo Smithkline	27.7	0.9%	7.70	48.6x	22.1x
MJL Bangladesh Limited	26.9	0.9%	7.46	14.6x	4.2x
National Life Insurance Company Ltd.	26.6	0.8%	5.28	NM	24.5x

Top Twenty Free Float Mcap	Free Float Mcap (Bn BDT)	% of Total Free Float	Turnover (mn BDT)	PE	PB
Square Pharmaceuticals	119.6	9.5%	141.22	13.3x	2.8x
Renata Ltd.	51.3	4.1%	22.63	24.5x	5.8x
British American Tobacco Bangladesh Company Limited	50.2	4.0%	124.93	21.9x	7.8x
Grameenphone Ltd.	43.2	3.4%	206.50	12.7x	10.2x
Beximco Pharmaceuticals	40.9	3.2%	627.39	13.8x	1.7x
BRAC Bank	28.9	2.3%	269.39	11.5x	1.2x
Olympic Industries	25.9	2.0%	20.43	17.7x	5.7x
Eastern Bank	20.5	1.6%	2.31	7.5x	1.1x
Islami Bank	20.1	1.6%	21.26	7.1x	0.7x
Beximco Limited	18.5	1.5%	350.88	24.5x	0.4x
LafargeHolcim Bangladesh Limited	18.0	1.4%	139.10	28.3x	3.3x
Pubali Bank	16.8	1.3%	4.27	11.1x	0.8x
Summit Power	16.3	1.3%	75.69	7.8x	1.7x
National Bank	16.2	1.3%	15.08	5.1x	0.5x
City Bank	15.8	1.2%	55.27	8.3x	0.9x
United Power Generation & Distribution Company Ltd	14.3	1.1%	103.30	19.9x	9.7x
Beacon Pharmaceuticals Limited	12.9	1.0%	87.88	160.4x	6.3x
Southeast Bank	11.8	0.9%	29.34	5.0x	0.5x
IFIC Bank	11.7	0.9%	116.93	6.4x	0.6x
Prime Bank	11.7	0.9%	5.86	11.1x	0.7x

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
The ACME Laboratories Limited	80.00	80.00	2.40	30,000	1
Anwar Galvanizing Ltd.	90.00	86.00	1.49	16,900	2
Baraka Power Limited	31.00	31.00	15.50	500,000	1
Beacon Pharmaceuticals Limited	80.00	80.00	16.00	200,000	2
Beximco Limited	26.90	26.90	4.57	170,000	1
Beximco Pharmaceuticals	110.00	110.00	87.39	794,454	2
Daffodil Computers Ltd.	69.00	67.00	8.75	128,500	3
Fine Foods Ltd	69.80	69.80	0.59	8,490	1

Block Trade	Maximum Price	Minimum Price	Turnover (mn BDT)	Quantity	Trade
Genex Infosys Limited	60.50	60.50	6.05	100,000	1
GQ Ball Pen	197.20	197.20	2.27	11,500	2
ICB AMCL Third NRB Mutual Fund	7.50	7.50	0.75	100,000	1
Kay and Que	222.00	222.00	1.22	5,500	1
M.L. Dyeing Limited	47.00	45.90	4.66	100,520	8
Orion Pharma Ltd.	59.80	59.80	0.60	10,000	1
Pragati Life Insurance	128.00	128.00	0.52	4,089	1
Pubali Bank	25.50	25.50	2.55	100,000	2
Saiham Cotton Mills Limited	17.10	17.10	1.71	100,000	1
Sea Pearl Beach Resort & Spa Limited	72.20	71.20	1.21	16,872	2
Silva Pharmaceuticals Limited	22.80	22.80	2.28	100,000	1
Singer Bangladesh	166.60	165.00	41.41	250,000	3
SK Trims & Industries Limited	68.10	68.10	1.70	25,000	1
Southeast Bank	13.50	13.50	29.95	2,218,512	1
Summit Power	45.70	45.70	0.94	20,500	1
United Power Generation & Distribution Company Ltd	269.50	269.00	6.57	24,400	3
Total			241.09		43

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
AGRANINS	Agrani Insurance Company Limited	-	0.0%	10.0%	31-Dec-19	02-Sep-20
GSPFINANCE	GSP Finance Company (Bangladesh)	-	4.5%	6.0%	31-Dec-19	03-Sep-20
GRAMEENS2	Grameen One: Scheme Two	-	0.0%	7.0%	30-Jun-20	06-Sep-20
PRAGATILIF	Pragati Life Insurance Ltd.	1R:1	0.0%	0.0%	-	07-Sep-20
SEBL1STMF	Southeast Bank 1st Mutual Fund	-	0.0%	3.0%	30-Jun-20	09-Sep-20
NLI1STMF	NLI First Mutual Fund	-	0.0%	5.0%	30-Jun-20	09-Sep-20

Important DSE News

MEGHNALIFE

The Board of Directors has recommended 20% cash dividend for the year ended on December 31, 2019. Date of AGM: 22.10.2020, Time: 11:00 AM, Venue: Digital Platform. Record Date: 21.09.2020.

Ms. Umme Khadiza Meghna, one of the Directors of the Company, has expressed her intention to buy 1,53,000 shares of the Company at prevailing market price (In the Block Market) through Stock Exchange (DSE) within next 30 working days.

BDFINANCE

The Board of Directors has recommended 12% cash dividend for the year ended on December 31, 2019. Date of AGM: 10.12.2020, Time: 11:00 AM, Venue: Digital Platform. Record Date: 08.10.2020. The Company has also reported Consolidated EPS of Tk. 1.12, Consolidated NAV per share of Tk. 16.37 and Consolidated NOCFPS of Tk. 0.97 for the year ended on December 31, 2019 as against Tk. 1.68 (restated), Tk. 15.25 and Tk. 1.64, respectively for the same period of the previous year.

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AIL

(Q3 Un-audited): EPS was Tk. 0.39 for January-March 2020 as against Tk. 0.55 for January-March 2019; EPS was Tk. 1.38 for July 2019-March 2020 as against Tk. 2.16 for July 2018-March 2019. NOCFPS was Tk. 0.13 for July 2019-March 2020 as against Tk. 0.16 for July 2018-March 2019. NAV per share was Tk. 20.56 as on March 31, 2020 and Tk. 20.83 as on June 30, 2019.

ALIF

(Q3 Un-audited): EPS was Tk. 0.16 for January-March 2020 as against Tk. 0.23 for January-March 2019; EPS was Tk. 0.39 for July 2019-March 2020 as against Tk. 0.63 for July 2018-March 2019. NOCFPS was Tk. 0.10 for July 2019-March 2020 as against Tk. 0.58 for July 2018-March 2019. NAV per share was Tk. 13.64 as on March 31, 2020 and Tk. 14.50 as on June 30, 2019.

GENEXIL

The Company has informed that the Board of Directors has approved an agreement with "Reddot Digital Limited", a subsidiary of Robi Axiata Ltd., the country's second-largest mobile operator, to be called "Strategic Business Agreement", to launch a service, called "Binge", combining Internet Protocol Television (IPTV) and online streaming platform for customers to purchase service for their digital entertainment. Binge is Bangladesh's first Google-certified online video-streaming service along with an android device that offers endless entertainment and has been developed by Genex Infosys Limited. Bangladesh Telecommunication Regulatory Commission (BTRC) issued the IPTV license to operate such service to Genex Infosys Limited. This IPTV and its related strategic services segment is expected to generate up to Tk. 5.00 crore revenue per year.

BDFINANCE

(Q1 Un-audited): Consolidated EPS was Tk. 0.35 for January-March, 2020 as against Tk. 0.05 for January-March, 2019. Consolidated NOCFPS was Tk. 2.49 for January-March, 2020 as against Tk. (1.11) for January-March, 2019. Consolidated NAV per share was Tk. 16.72 as on March 31, 2020 and Tk. 16.37 as on December 31, 2019.

(Q2 Un-audited): Consolidated EPS was Tk. 0.12 for April-June 2020 as against Tk. 0.18 for April-June 2019; Consolidated EPS was Tk. 0.46 for January-June 2020 as against Tk. 0.23 for January-June 2019. Consolidated NOCFPS was Tk. 2.13 for January-June 2020 as against Tk. (0.53) for January-June 2019. Consolidated NAV per share was Tk. 16.83 as on June 30, 2020 and Tk. 16.37 as on December 31, 2019.

MTB

Mr. Rashed Ahmed Chowdhury, Nominated Director of Mutual Trust Bank Ltd., has expressed his intention to buy 1,05,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

MERCANBANK

Mr. Md. Shahabuddin Alam, one of the Sponsors of the Company, has expressed his intention to sell 67,34,840 shares out of his total holding of 85,38,935 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

ASIAINS

Mr. Mohammad Ali Khakon, one of the Directors of the Company, has expressed his intention to buy 8,79,000 shares of the Company at prevailing market price (In the Block Market) through Stock Exchange (DSE) within next 30 working days.