Daily Stock Market Review

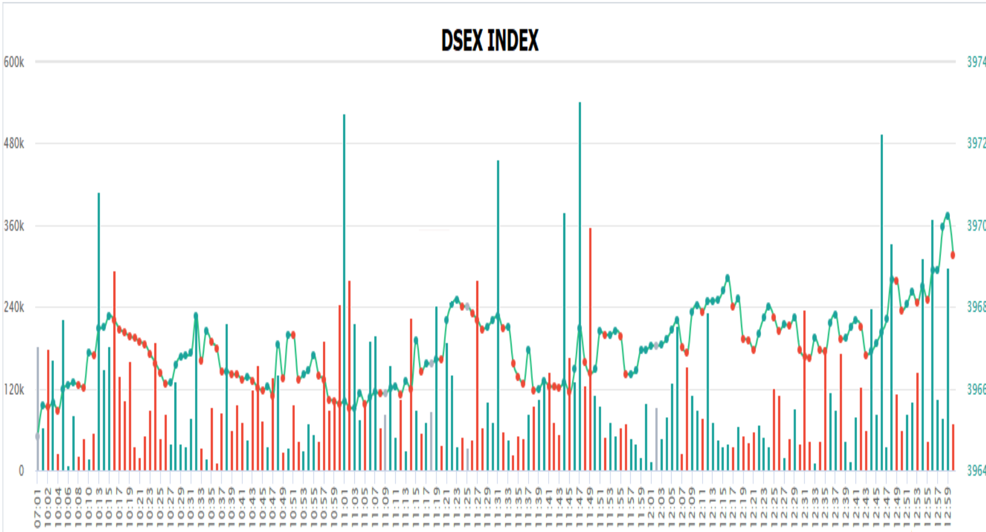
June 25, 2020 ▲ DSEX up by 4.45 Points (0.11%); DSE-MCAP: USD 36.63 Billion ; Turnover: USD 8.06 Million

GREEN DELTA CAPITAL

Comment

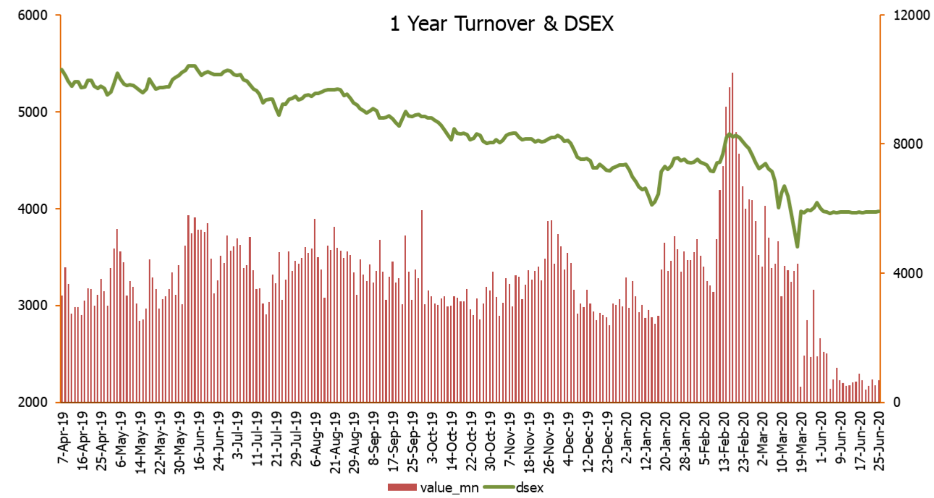
Stocks ended slightly higher with turnover remaining below BDT 1.0 billion-mark for the 13th straight session as investors mostly followed cautious stance amid worsening pandemic situation. Turnover remained below BDT 1.0 billion-mark for the 13-trading sessions which was 26 per cent higher than previous day's turnover of BDT 541 million.

Today there were 30 gainers, 16 losers while 221 issues were unchanged. The total market capitalization stood at BDT 3108.35 billion and total turnover reached at BDT 683.57 million. The Banking sector has gained 0.11% today reaching 19.0% of the total market capitalization. Also, NBFI sector to reach 6.4% of the total market capitalization. Generation Next Fashions Limited was the top gainer of the day with a gain of 9.09% from Textile sector and Beximco Pharmaceuticals Ltd. became the top traded share.



	Bourses	Indices	TCI	YCI	Δ	% Δ	YTD Δ
Market Valuation	DSE	DSEX	3969.28	3964.83	4.45	0.11%	-10.86%
		DS30	1330.32	1327.33	2.98	0.22%	-12.09%
		DSES	919.50	918.57	0.93	0.10%	-8.03%
	CSE	CASPI	11262.09	11256.15	5.95	0.05%	-16.61%
		CSCX	6818.26	6817.62	0.64	0.01%	-16.73%
		CSE30	9915.16	9906.92	8.24	0.08%	-13.33%
		CSE50	809.44	808.97	0.47	0.06%	-18.17%
		CSI	728.72	728.08	0.64	0.09%	-15.17%

TCI-Today's Closing Index, YCI-Yesterdays Closing Index, YTD-Year to date



		DSE		CSE	
Market Capitalization		BDT bn	USD bn	BDT bn	USD bn
	T MCAP	3108.35	36.63	2436.27	28.71
	Y MCAP	3107.32	36.62	2436.30	28.71
	% Δ	0.03%		0.00%	

TMCAP-Today's Market Capitalization, YMCAP-Yesterday's Market Capitalization

	DSE		CSE	
Year High-Low Market Capitalization	Value	Date	Value	Date
	4072.46	4-Apr-19	3362.87	4-Apr-19
	2873.83	18-Mar-20	2218.04	18-Mar-20

		DSE		CSE	
Market Total Turnover		BDT mn	USD mn	BDT mn	USD mn
	T Turnover	683.57	8.06	936.44	11.04
	Y Turnover	541.40	6.38	116.07	1.37
	% Δ	26.26%		706.82%	
	Avg (Year)	3774.61		254.62	

T Turnover-Today's turnover, Y Turnover– Yesterday's Turnover

		DSE		CSE	
Advanced/ Declined		Today	Yesterday	Today	Yesterday
	Issue Gain	30	24	20	20
	Issue Loss	16	15	12	11
	Unchanged Issue	221	234	299	300

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Top 10 Traded Shares (DSE)	TCP (BDT)	YCP (BDT)	% Δ in Price	TT (BDT mn)	YT (BDT mn)	% Δ in Turnover	Total MCAP (USD mn)
BXPHARMA	64.8	63.6	1.9	82.68	58.7	40.9%	26280
RECKITTBEN	3533.9	3647.2	-3.1	28.97	12.62	129.6%	16698
BSCCL	79.5	79.4	0.1	27.85	23.97	16.2%	13110
SUMITPOWER	35.1	35.1	0.0	22.91	5.49	317.3%	37482
IBP	19.9	19.5	2.1	16.44	5.9	178.6%	2219
LINDEBD	1279.8	1281.1	-0.1	15.3	19.23	-20.4%	19476
SQURPHARMA	172.5	172.5	0.0	14.13	10.45	35.2%	145631
PHARMAID	388.0	383.0	1.3	13.04	8.29	57.3%	1211
WATACHEM	306.8	306.8	0.0	12.61	6.67	89.1%	4548
FIRSTSBANK	8.3	8.2	1.2	12.49	2.94	324.8%	7159

TCP– Today's close price, YCP-Yesterday's close price, TT-Today's Turnover, YT– Yesterday's Turnover, Total MCAP-Total Market capitalization

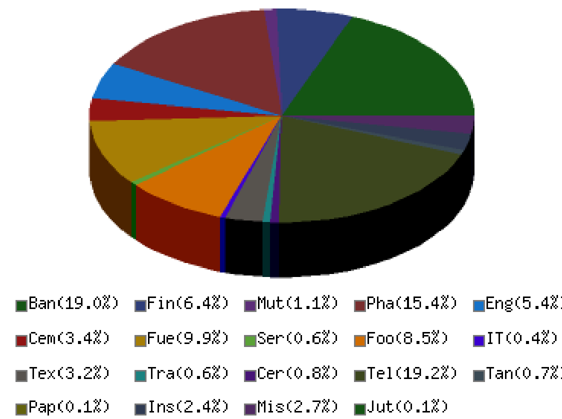
Top 10 Gainers (DSE)	TCP (BDT)	YCP (BDT)	% Δ in Price	TT (BDT mn)	YT (BDT mn)	% Δ in Turnover	Total MCAP (USD mn)
GENNEXT	2.4	2.2	9.09	8	0.47	1602.1%	1188
DACCADYE	5.0	4.6	8.70	2.48	1.65	50.3%	436
KEYACOSMET	2.9	2.7	7.41	4.24	4.87	-12.9%	3197
TALLUSPIN	2.9	2.7	7.41	0.75	0.36	108.3%	259
APOLOISPAT	3.4	3.2	6.25	2.49	3.55	-29.9%	1364
FAMILYTEX	1.9	1.8	5.56	3.86	0.28	1278.6%	673
TUNGHAI	2.0	1.9	5.26	0.76	0.07	985.7%	213
BXSYNTH	6.6	6.4	3.12	1.32	1.24	6.5%	572
LIBRAINFU	506.8	496.3	2.12	0.36	0.19	89.5%	761
IBP	19.9	19.5	2.05	16.44	5.9	178.6%	2219

TCP– Today's close price, YCP-Yesterday's close price, TT-Today's Turnover, YT– Yesterday's Turnover, Total MCAP-Total Market capitalization

Top 10 Losers (DSE)	TCP (BDT)	YCP (BDT)	% Δ in Price	TT (BDT mn)	YT (BDT mn)	% Δ in Turnover	Total MCAP (USD mn)
ARAMITCEM	11.70	12.50	-6.40	0.08	0.00	-	396.40
RECKITTBEN	3533.90	3647.20	-3.11	28.97	12.62	1.30	16697.68
ABBANK	6.90	7.10	-2.82	0.63	1.11	-0.43	5231.10
POWERGRID	41.70	42.40	-1.65	0.76	2.15	-0.65	19220.07
ICBEPMF1S1	6.20	6.30	-1.59	1.67	0.33	4.06	465.00
REPUBLIC	18.80	19.10	-1.57	0.46	0.10	3.60	814.76
EASTRNLUB	943.70	951.20	-0.79	8.80	6.75	0.30	938.04
PRAGATIINS	32.20	32.40	-0.62	0.04	0.06	-0.33	2112.01
PRIMEINSUR	17.00	17.10	-0.58	0.03	0.28	-0.89	694.92
NTC	475.30	477.90	-0.54	0.91	1.31	-0.31	3136.98

TCP– Today's close price, YCP-Yesterday's close price, TT-Today's Turnover, YT– Yesterday's Turnover

Sector Wise Market Capitalization (DSE)



Sector Valuation (DSE)	T MCAP (BDT in mn)	% Δ of MCAP	T Turnover (BDT in mn)	% Δ Turnover	PE	Div. Yield
Banking Sector	445103	0.11%	59.00	-61.2%	6.52	6.4%
Financial Institution	125778	-	5.00	150.0%	21.71	5.8%
Mutual Funds	27709	-0.03%	9.00	-30.8%	--	8.8%
Pharmaceuticals	459041	0.10%	224.00	40.0%	14.58	2.6%
Engineering	131988	0.06%	10.00	42.9%	16.32	3.9%
Cement	71888	-0.04%	0.00	-	21.75	2.5%
Fuel & Power	353480	-0.10%	63.00	61.5%	10.77	6.1%
Service & Real Est.	13042	-	0.00	-	11.42	3.7%
Food & Allied	208253	-0.01%	4.00	33.3%	17.27	4.1%
IT	19514	-	1.00	0.0%	16.86	1.6%
Textile	95462	0.20%	23.00	228.6%	12.57	4.0%
Travel & Leisure	24877	-	0.00	-	21.61	0.0%
Ceramic	19761	-	2.00	-33.3%	27.05	3.7%
Telecomm.	335562	0.00%	39.00	25.8%	7.71	5.3%
Tannery	17849	-	0.00	-	26.00	1.8%
Paper & Printing	9626	-	0.00	-	31.47	3.3%
Insurance	91391	0.37%	9.00	-18.2%	25.69	3.0%
Miscellaneous	92268	0.00%	3.00	0.0%	19.49	2.6%
Jute	1764	0.29%	2.00	-66.7%	44.78	1.5%
Total	**3108348**	-	-	-	**11.11**	-

	S&P 500	FTSE 100	NIKKEI 225	HANG SENG	BSE
World market	3,380.16	7,362.69	23,193.80	27,530.20	12,258.35

	USD	AUD	GBP	EURO
Exchange Rates (BDT)	84.85	57.98	111.04	93.61

Macro News

World Bank approves $500m to improve road connectivity in Bangladesh

The World Bank (WB) has approved 500 million US dollar to help Bangladesh improve road connectivity along the Jashore-Jhenaidah corridor covering four western districts. "The western region of Bangladesh is endowed with many agricultural and natural produce and holds great potential of becoming a gateway for regional and international trade," World Bank Country Director for Bangladesh and Bhutan, said in a statement. "This project will unlock the region's potential by stimulating the economy of districts, linking farms to markets, connecting Dhaka with the western region as well as with neighboring countries, thus enhancing trade, transit and logistics along the corridor." The Western Economic Corridor and Regional Enhancement (WeCARE) Phase I project is the first of a multi-phased $1.4 billion World Bank programme to upgrade the existing 110 KM two-lane highway—Bhomra-Satkhira-Navaron and Jahore-Jhenaidah, to a safer and climate-resilient four-lane highway in western Bangladesh, the WB said in its statement, issued from Washington DC.

BD's forex reserve crosses $35 billion mark for first time

Bangladesh's foreign exchange (forex) reserve crossed the US$35 billion-mark -- for the first time in its history, following lower import payment obligations and steady growth of inward remittance, officials said. The forex reserve rose to $35.09 billion on the day, setting a new record, from $34.88 billion of the previous working day, according to the central bank's latest data. "Our forex reserve has crossed the $35 billion-mark following lower import payment pressure on the economy and upward trend of inward remittance in recent days," a senior official of the Bangladesh Bank (BB) explained. Foreign loans and assistants have also contributed to obtain the new record of foreign exchange reserve, according to the central banker. Earlier on June 04, the foreign exchange reserve crossed US$34 billion after a substantial amount of funds was received from a multilateral donor agency.

Sector News

Mutual Funds

ATCSLGF
(Q3 Un-audited): EPU was Tk. (0.99) for January-March 2020 as against Tk. 0.33 for January-March 2019. EPU was Tk. (1.63) for July 2019-March 2020 as against Tk. 0.92 for July 2018-March 2019. NOCFPU was Tk. (0.12) for July 2019-March 2020 as against Tk. 0.79 for July 2018-March 2019. NAV per unit at market price was Tk. 10.11 as on March 31, 2020 and Tk. 12.95 as on June 30, 2019. NAV per unit at cost price was Tk. 11.77 as on March 31, 2020 and Tk. 12.49 as on June 30, 2019.

VAMLBDMF1
(Q2 Un-audited): EPU was Tk. (0.54) for January-March 2020 as against Tk. 0.00 for January-March 2019; EPU was Tk. (1.45) for October 19-March 20 as against Tk. 0.24 for October 2018-March 2019. NOCFPU was Tk. 0.08 for October 19-March 20 as against Tk. 0.06 for October 2018-March 2019. NAV per unit at market price was Tk. 8.77 as on March 31, 2020 and Tk. 10.22 as on September 30, 2019. NAV per unit at cost price was Tk. 11.27 as on March 31, 2020 and Tk. 11.03 as on September 30, 2019.

Insurance

ASIAPACINS
As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on July 02, 2020 at 2:30 PM to consider, among others, un-audited financial statements of the Company for the First Quarter (Q1) period ended on March 31, 2020.

ASIAPACINS
As per Regulation 19(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on July 02, 2020 at 2:30 PM to consider, among others, audited financial statements of the Company for the year ended on December 31, 2019.