Daily Stock Market Review

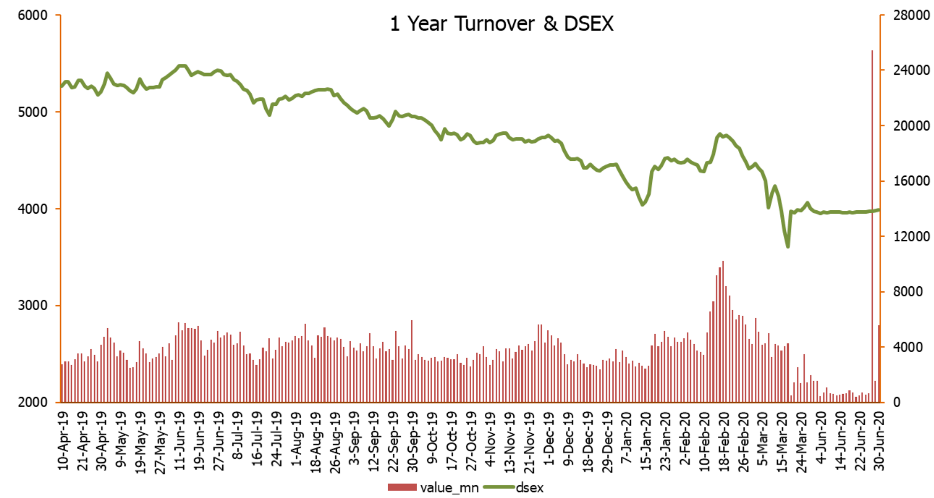
June 30, 2020 ▲ DSEX up by 7.45 Points (0.19%); DSE-MCAP: USD 36.77 Billion ; Turnover: USD 65.49 Million

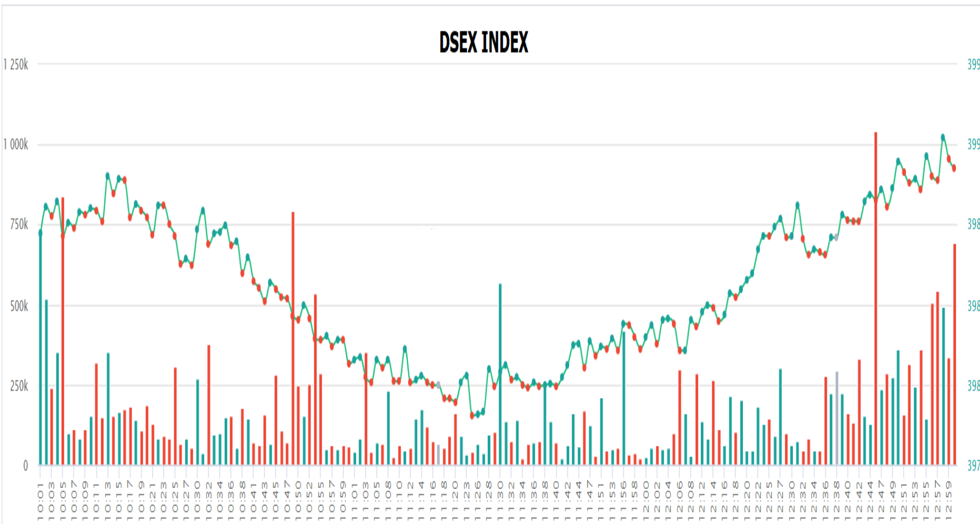
GREEN DELTA CAPITAL

Comment

Stocks ended marginally higher on, the last session of the fiscal year (FY) 2019-20, as some investors showed their appetite based on the quarterly earnings disclosures. DSEX added 26 points in the past six consecutive sessions despite the worsening pandemic situation in the country. Market analysts said although the floor price limitation kept the market static, some investors were relatively vibrant on the day due mainly to enjoy the existing tax benefits to reduce their income tax burden for the ending the FY 2019-20

Today there were 39 gainers, 25 losers while 224 issues were unchanged. The total market capitalization stood at BDT 3119.67 billion and total turnover reached at BDT 5557.15 million. The Banking sector has gained 0.23% today reaching 19.0% of the total market capitalization. Also, NBFI sector gained 0.02% to reach 6.4% of the total market capitalization. Fine Foods Limited was the top gainer of the day with a gain of 6.50% from Food and Allied sector and Beximco Pharmaceuticals Ltd. became the top traded share.





		DSE		CSE	
		BDT bn	USD bn	BDT bn	USD bn
Market Capitalization	T MCAP	3119.67	36.77	2447.57	28.85
	Y MCAP	3116.23	36.73	2444.02	28.80
	% Δ	0.11%		0.15%	

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

	DSE		CSE	
Year High-Low Market Capitalization	Value	Date	Value	Date
	4022.04	11-Jun-19	3317.05	11-Jun-19
	2873.83	18-Mar-20	2218.04	18-Mar-20

	Bourses	Indices	TCI	YCI	Δ	% Δ	YTD Δ
Market Valuation	DSE	DSEX	3989.09	3981.64	7.45	0.19%	-10.42%
		DS30	1340.98	1335.51	5.47	0.41%	-11.39%
		DSES	925.08	923.57	1.52	0.16%	-7.48%
	CSE	CASPI	11332.59	11308.81	23.78	0.21%	-16.09%
		CSCX	6862.14	6846.86	15.29	0.22%	-16.19%
		CSE30	9925.12	9906.02	19.10	0.19%	-13.24%
		CSE50	816.29	813.59	2.70	0.33%	-17.47%
		CSI	733.28	732.37	0.91	0.12%	-14.64%

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

		DSE		CSE	
		BDT mn	USD mn	BDT mn	USD mn
Market Total Turnover	T Turnover	5557.15	65.49	2261.65	26.65
	Y Turnover	1546.61	18.23	785.72	9.26
	% Δ	259.31%		187.85%	
	Avg (Year)	3859.16		271.49	

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

		DSE		CSE	
		Today	Yesterday	Today	Yesterday
Advanced/ Declined	Issue Gain	39	41	25	29
	Issue Loss	25	20	16	13
	Unchanged Issue	224	239	290	289

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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	69.2	67.7	2.2	126.51	163.45	-22.6%	28065
BSCCL	86.7	83.6	3.7	88.34	69.51	27.1%	14297
CENTRALPHL	13.3	13.1	1.5	52.53	27.6	90.3%	1593
SQURPHARMA	172.5	172.5	0.0	46.36	33.81	37.1%	145631
IBP	20.6	20.3	1.5	41.17	48.57	-15.2%	2297
ACMELAB	63.4	61.9	2.4	38.82	18.31	112.0%	13416
LINDEBD	1292.0	1284.5	0.6	35.08	28.9	21.4%	19662
JAMUNABANK	16.3	16.0	1.9	30.52	20.42	49.5%	12212
WATACHEM	314.7	310.2	1.5	27.71	24.1	15.0%	4665
ALARABANK	14.8	15.0	-1.3	25.91	9.82	163.8%	15761

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

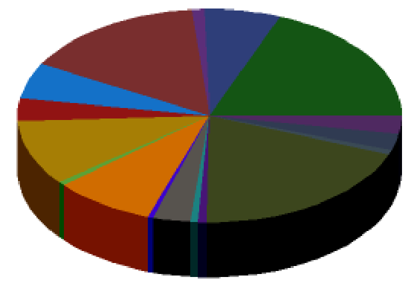
Top 10 Gainers (DSE)	TCP (BDT)	YCP (BDT)	% Δ in Price	TT (BDT mn)	YT (BDT mn)	% Δ in Turnover	Total MCAP (USD mn)
FINEFOODS	45.9	43.1	6.50	16.43	8.87	85.2%	641
AMBEEPHA	480.7	452.6	6.21	11.97	5.61	113.4%	1154
LIBRAINFU	564.4	542.7	4.00	0.81	1.31	-38.2%	848
CNATEX	1.9	1.9	0.00	1.49	1.65	-9.7%	455
NBL	7.2	7.0	2.86	15.49	11.81	31.2%	21027
PF1STMF	7.7	7.5	2.67	5.87	3.78	55.3%	462
NCCBANK	12.2	11.9	2.52	7.02	6.23	12.7%	11314
CITYBANK	16.7	16.3	2.45	23.76	25.09	-5.3%	16974
ACMELAB	63.4	61.9	2.42	38.82	18.31	112.0%	13416
NBL	7.2	7.0	2.86	15.49	11.81	31.2%	21027

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)
KEYACOSMET	2.80	3.00	-6.67	2.33	13.07	-0.82	3086.49
TALLUSPIN	3.20	3.40	-5.88	0.43	1.19	-0.64	285.87
ZAHINTEX	3.60	3.80	-5.26	0.20	0.12	0.67	294.58
DACCADYE	4.20	4.40	-4.55	0.66	0.84	-0.21	366.04
TUNGHAI	2.20	2.30	-4.35	0.44	0.83	-0.47	234.64
GENNEXT	2.30	2.40	-4.17	1.12	1.97	-0.43	1138.44
APOLOISPAT	3.40	3.50	-2.86	2.10	2.24	-0.06	1364.45
DELTASPINN	3.50	3.60	-2.78	0.23	0.28	-0.18	582.69
MTB	24.10	24.60	-2.03	0.03	0.15	-0.80	15338.03
ICBEPMF1S1	6.20	6.30	-1.59	1.58	0.88	0.80	465.00

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 Turno-ver	PE	Div. Yield
Banking Sector	447873	0.23%	153.00	0.0%	5.95	6.1%
Financial Institution	125820	0.02%	4.00	0.0%	21.71	6.0%
Mutual Funds	27706	-0.02%	13.00	-23.5%	--	8.3%
Pharmaceuticals	464535	0.34%	472.00	-0.4%	14.75	2.6%
Engineering	131988	-0.03%	10.00	25.0%	15.25	3.9%
Cement	71895	-	0.00	-100.0%	22.12	2.6%
Fuel & Power	354404	0.02%	56.00	14.3%	10.94	6.0%
Service & Real Est.	13042	-	0.00	-100.0%	11.42	3.7%
Food & Allied	208353	0.03%	27.00	92.9%	17.27	4.1%
IT	19514	-	1.00	-	17.02	2.3%
Textile	95481	-0.14%	10.00	-28.6%	12.82	4.2%
Travel & Leisure	24877	-	1.00	-75.0%	21.90	0.0%
Ceramic	19761	-	1.00	0.0%	27.05	3.7%
Telecomm.	336749	0.15%	102.00	24.4%	7.71	5.3%
Tannery	17849	-	0.00	-	26.00	2.0%
Paper & Printing	9626	-	0.00	-100.0%	31.47	2.8%
Insurance	91614	0.23%	12.00	33.3%	25.65	3.3%
Miscellaneous	92268	-	9.00	-10.0%	19.56	2.5%
Jute	1798	0.65%	6.00	0.0%	45.65	1.5%
Total	**3119670**	-	-	-	**10.82**	-

	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

MFS transactions dip 27pc in April on pandemic

Money transactions through mobile financial services dropped by 27 per cent in April compared with that of the previous month mainly due to the imposition of shutdown and subsequent stagnation in economic activities amid coronavirus outbreak in the country. According to the latest Bangladesh Bank data, transactions through MFS slid to Tk 29,029 crore in April from Tk 39,785 crore in the previous month. The first coronavirus cases were detected in the country on March 8, 2020. As the virus was spreading, the government announced general holidays and imposed restrictions on movement from March 29 to halt the spike. The country went into holidays for around two months, ending on May 30, resulting in stagnation in economic activities. As a result, daily average transactions through the payment gateways also dropped to Tk 968 crore in April this year from Tk 1,283 crore in March.

Mobile users, FMCG companies miffed as Finance Bill 2020 stays mostly unchanged

Finance Minister must have harked back on that oft-quoted saying of English monk John Lydgate when he was finalising the Finance Bill 2020. Lydgate had said: "You can please some of the people all of the time, you can please all of the people some of the time, but you can't please all of the people all of the time." The final version of finance bill is of that nature too. While it brought relief to individual taxpayers amid the hard times, consumers and businesses were left disappointed as the bill was passed in the parliament yesterday without any major changes. What elicited the most discontent, probably, was his refusal to back down from his proposal to hike the supplementary duty on mobile services, when it has become an absolutely essential service amid the pandemic, by 5 percentage points to 15 per cent.

Sector News

Tannery

BATASHOE
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 08, 2020 at 2:00 PM to consider, among others, un-audited financial statements of the Company for the First Quarter (Q1) period ended on March 31, 2020.

BATASHOE
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 08, 2020 at 2:00 PM to consider, among others, audited financial statements of the Company for the year ended on December 31, 2019.

CNW

Sonali Paper & Board Mills Limited: (Q3 Un-audited): EPS was Tk. 0.32 for January-March 2020 as against Tk. 1.19 for January-March 2019; EPS was Tk. 2.08 for July 2019-March 2020 as against Tk. 3.14 for July 2018-March 2019. NOCFPS was Tk. 7.10 for July 2019-March 2020 as against Tk. (10.73) for July 2018-March 2019. NAV per share was Tk. 308.36 as on March 31, 2020 and Tk. 306.28 as on June 30, 2019.

Bank

NCCBANK
As per Regulation 19(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has further informed that a meeting of the Board of Directors will be held on July 09, 2020 at 3:00 PM to further consider, among others, audited financial statements of the Company for the year ended on December 31, 2019.

NCCBANK
As per Regulation 19(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has further informed that a meeting of the Board of Directors will be held on July 09, 2020 at 3:00 PM to further consider, among others, audited financial statements of the Company for the year ended on December 31, 2019.

Pharmaceuticals & Chemicals

SILVAPHL
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 3:00 PM to consider, among others, un-audited financial statements of the Company for the Third Quarter (Q3) period ended on March 31, 2020.