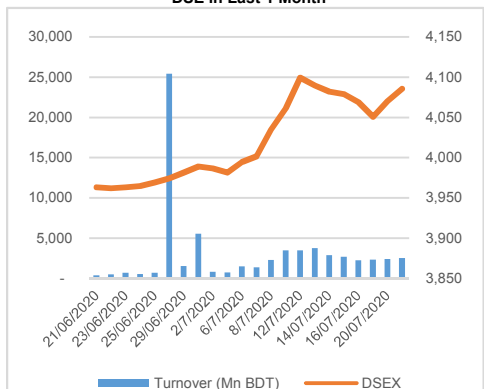


INDEX MOVER				
Company	LTP	YCP	IND.CHG	VOLUME
Positive impact				
GP	247	245	0.32	254,704
BEACONPHA	72	68	0.30	709,618
NATLIFEINS	255	247	0.25	4,295
OLYMPIC	155	152	0.20	35,694
ICB	69	68	0.18	118,800
Negative impact				
TRUSTBANK	25	26	(0.20)	218,042
JAMUNABANK	16	17	(0.18)	150,365
GLAXOSMITH	2,143	2,185	(0.15)	10,568
RENATA	1,030	1,035	(0.13)	6,767
NBL	7	8	(0.09)	1,094,219

YCP = Yesterday Closing Price LTP = Last Trade Price

## DSE in Last 1 Month



## Top Gainers (Turnover based)

INSTRUMENT	Price	Value (Mn BDT)	Volume
BXPHERMA	75	116	1,544,361
SQURPHARMA	176	112	640,794
GP	247	63	254,704
PIONEERINS	38	63	1,717,386
BSC	42	61	1,479,036
BSCCL	93	59	642,421
GHAIL	18	54	3,064,502
MONNOCERA	128	53	416,006
BEACONPHAR	72	50	709,618
IBP	21	47	2,221,876

## Market Statistics

Market Cap (In Mn BDT)  
Total Volume (In Mn BDT)  
DSEX  
DSES  
DS-30  
Market P/E

Today  
3,171,666  
2,529  
4,086  
948  
1,372  
11.5

## % Change

0.29%  
5.16%  
0.38%  
0.45%  
0.54%

## World Markets

Indices % Change  
10,767 2.51%  
25,636 2.31%  
37,930 1.37%

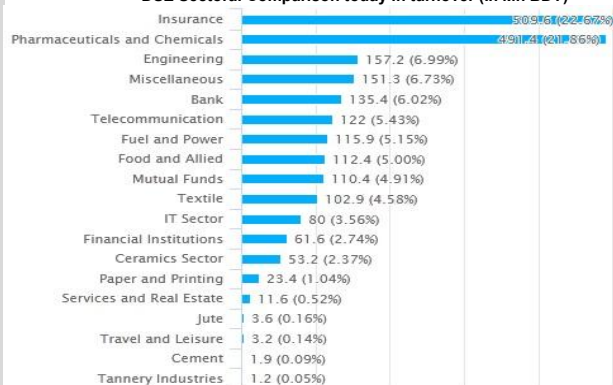
## Exchange Rates

Currency Rates  
USD 84.77  
GBP 107.68  
EUR 97.09

## Market Commentary

Today's Market / DSEX (Prime bourse : DSE / Dhaka Stock Exchange Ltd.) ended up 0.38 % with 5.16 % growth in total turnover. BXPHERMA, SQURPHARMA, GP, PIONEERINS, BSC stocks dominated today's market turnover. However, DHAKAINS was today's best performer having the highest growth of 9.97 % from YCP. DSEX reflected a bullish mode throughout the day resulting in 131 issues advanced out of 347 total issues traded.

## DSE Sectoral Comparison today in turnover (In Mn BDT)

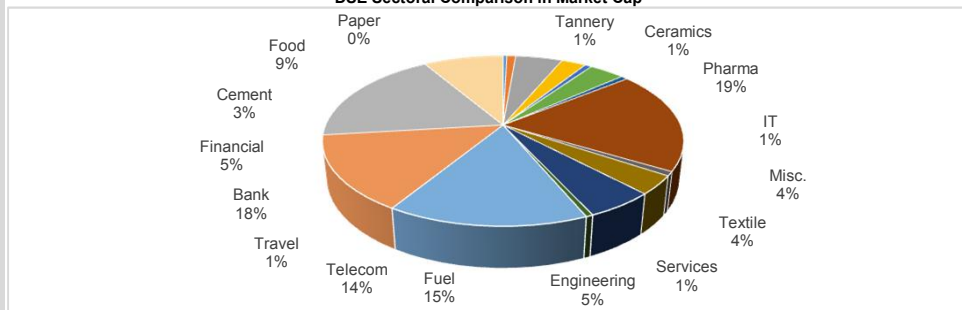


## DSE Sectoral Comparison in P/E

Sector name	P/E Ratio
Paper	44
Travel	34
Financial	31
Cement	29
Tannery	26
Misc.	20
Ceramics	20
Pharma	17
IT	15
Textile	15
Engineering	14
Services	11
Fuel	10
Telecom	10
Bank	9
Food	8

Average 11.5

## DSE Sectoral Comparison in Market Cap



## DSE's Important News Today

### AZIZPIPES

Placing the shares in Public Market from Spot Market as per BSEC Order

BSEC, vide its Order No. BSEC/Surveillance/2018-912/105 dated 20.07.2020, has withdrawn its earlier Order No. BSEC/Surveillance/2018-912/32 dated 16.08.2018 and placed the shares of Aziz Pipes Ltd. to the Public Market from Spot market for transactions, with effect from 21.07.2020. Moreover, financial adjustment facilities in transactions of the shares will be applicable as per the existing rules.

### ISLAMIINS

Dividend Declaration

The Board of Directors has recommended 5% cash and 5% stock dividend for the year ended on December 31, 2019. Date of AGM: 10.10.2020, Time: 10:30 AM, Venue: To be notified later on. Record Date: 13.08.2020.

### PRAGATILIF

Dividend Declaration

The Board of Directors has recommended 20% cash dividend for the year ended on December 31, 2019. Date of AGM: 27.09.2020, Time: 12:00 Noon, Venue: Digital Platform. Record Date: 12.08.2020.

## Other News Today

### RMG export earnings in July 1-18 total \$1.57b - Source: The Financial Express

The country's ready-made garment (RMG) export earnings in the first 18 days of July stood at US\$1.57 billion despite the Covid-19 pandemic, which local manufacturers consider as a good sign of reviving new or cancelled work orders. Bangladesh fetched \$1.78 billion during the same period of July 2019. The July 2020 earnings over that of last year declined by 11.74 per cent, according to Bangladesh Garment Manufacturers and Exporters Association (BGMEA) data. The country fetched \$2.25 billion, \$374.67 million, \$1.23 billion and \$2.24 billion in March, April, May and June of this year respectively. Subsequently, growth declined by 20.14 per cent, 85.25 per cent, 62.06 per cent and 6.63 per cent from March to June over the corresponding months of last year, according to data. When asked, Fazlul Hoque, former president of Bangladesh Knitwear Manufacturers and Exporters Association (BKMEA), said the present trend is positive, considering the overall situation. He said exports in July will be higher, as manufacturers will try to complete their shipments ahead of the Eid-ul-Azha. He, however, said buyers are now placing 70 per cent work orders compared to last year. Responding to a question, BGMEA president Dr Rubana Huq said RMG exports is around \$210 million lower than the 18 days' earnings of last July. "It is certainly a positive sign of hope for the industry (considering the ongoing pandemic)." She, however, added that this might not necessarily indicate new order placements by the buyers, but reinstatement of the orders, cancelled immediately after the Covid-19 outbreak started. The industry lost \$4.33 billion worth of export from March to June, and its growth is still below the positive trend, she noted. Regarding work orders, the BGMEA president said orders are being placed up to 60 per cent over that of last year, which is not enough for most factories to run in their full capacity. "Placement is going on, but a total recovery will take up to the middle of next year," she predicted. H&M, one of the country's largest global apparel buyers, announced in March temporary suspension of placing new orders to its listed supplier factories in Bangladesh amid the coronavirus outbreak. When asked, H&M Bangladesh country manager Ziaur Rahman said the company has placed new work orders worth over \$400 million until July 12. The Swedish retailer annually sources more than \$3.0 billion worth of RMG items from Bangladesh. It has recently announced a plan to close a total of 170 stores permanently in 2020. In an email communication, Dominic Roter, press officer at Communications Department of H&M Group, told FE: "We do not see this closure having any material impact on our strategic planning and sourcing from Bangladesh, a market that is very important for us." "We have longstanding relationships with our suppliers in the region, and are in close contact with each and every one of them, as they are our partners." Just as under normal circumstances, the company now fully stands by its responsible purchasing practices and contractual agreements, Dominic Roter noted. "We take delivery of and pay for already produced goods, as well as goods in production, if delivered within a reasonable timeframe. We are fulfilling all payments to our suppliers on time at the originally agreed price, without any re-negotiations," he added. Representatives of global buyers in Bangladesh said the new situation has rather created opportunities, as buyers are maximising use of the country. They are also observing a tendency of moving business from China and Turkey to Bangladesh. However, Mr Fazlul Hoque of BKMEA expressed doubt over complete grabbing of orders, shifting from China. He said Bangladesh is still in an advantageous position for the EU market due to duty-free market access there. "But for the US market, Vietnam is ahead of Bangladesh because of having Chinese investors there, who might shift the US

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