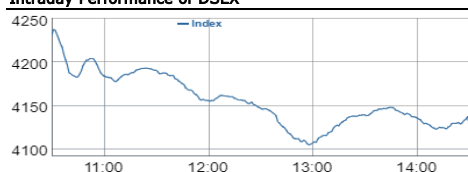


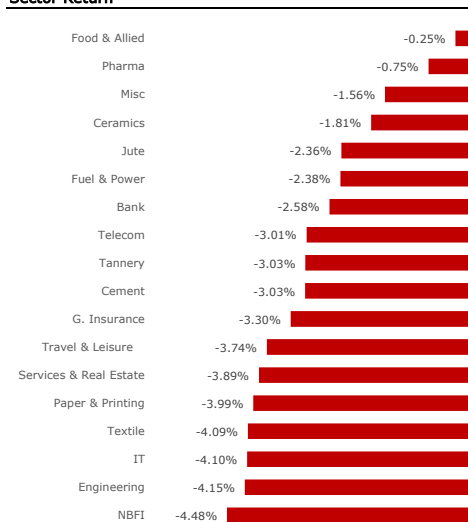
DSEX DOWN 101.53 POINTS

The market closed negative after two consecutive positive sessions losing a whopping 101.5 points. Broad index, DSEX, lost 2.4% in value with a 3.1% decrease in turnover. Among major sectors, NBFI (-4.5%), Engineering (-4.2%), and Textile (-4.1%) were hit most. The World Health Organization (WHO) has described the coronavirus outbreak as a pandemic; moreover, a section of international buyers has informed the Bangladeshi apparel exporters that they would reduce their existing orders by 15-30% due to this outbreak. Hence, coronavirus seems to be a major risk for the economy and capital market. Among large-cap scrips, BRAC BD (-4.2%), UPGO BD (-2.5%), and SQUARE BD (-0.9%) were hit most. OPL BD (+9.0%) was the top traded stock with a turnover of BDT 185mn.

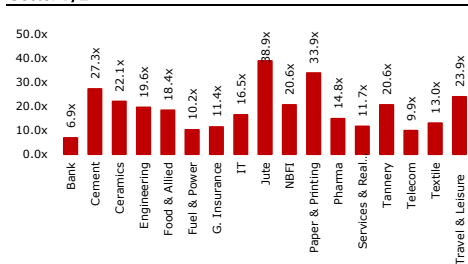
Intraday Performance of DSEX



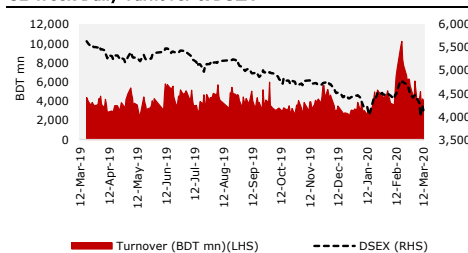
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'19 Value	YTD Δ %
DSEX	4,129.96	(101.53)	-2.40%	4,452.93	-7.25%
DS30	1,381.59	(32.02)	-2.27%	1,513.35	-8.71%
DSES	957.79	(21.76)	-2.22%	999.83	-4.20%
Dow Jones IA	23,553.22	(1,464.94)	-5.86%	28,538.44	-17.47%
Nikkei 225	18,559.63	(856.43)	-4.41%	23,656.62	-21.55%
FTSE 100	5,548.12	(328.40)	-5.59%	7,542.44	-26.44%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,094	4,225	-131	-3.10%	4,538
Turnover (USD mn)	49	50	-2	-3.10%	54
Volume (mn)	159	165	-6	-3.58%	169
Market Cap (BDT bn)	3,214	3,277	-64	-1.94%	
Market Cap (USD bn)	38	39	-1	-1.94%	
Market P/E (x)	11.7				

Particulars

Particulars	Galner	Loser	Unchanged
Market Breadth	36	293	22

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Pharma	475,030	14.78%	-0.8%	1,029.2	25.14%
Bank	453,910	14.12%	-2.6%	192.5	4.70%
Fuel & Power	377,012	11.73%	-2.4%	289.0	7.06%
Telecom	348,595	10.85%	-3.0%	129.8	3.17%
Food & Allied	218,133	6.79%	-0.3%	116.6	2.85%
Engineering	139,399	4.34%	-4.1%	540.6	13.20%
NBFI	131,590	4.09%	-4.5%	92.2	2.25%
Textile	100,853	3.14%	-4.1%	397.6	9.71%
Misc	97,124	3.02%	-1.6%	158.4	3.87%
Cement	76,197	2.37%	-3.0%	116.4	1.00%
G. Insurance	43,929	1.37%	-3.3%	110.1	2.69%
Travel & Leisure	25,441	0.79%	-3.7%	78.2	1.91%
Ceramics	20,720	0.64%	-1.8%	127.1	3.11%
IT	20,592	0.64%	-4.1%	72.3	1.77%
Tannery	18,727	0.58%	-3.0%	81.3	1.98%
Services & Real Estate	13,905	0.43%	-3.9%	15.6	0.38%
Paper & Printing	10,359	0.32%	-4.0%	74.3	1.81%
Jute	1,916	0.06%	-2.4%	28.6	0.70%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ORIONPHARM	44.90	8.98%	184.66	4.25	10.49
BEACONPHAR	65.10	-2.11%	115.10	1.77	108.50
ORIONINFU	78.60	-1.01%	110.96	1.40	34.47
GP	248.00	-2.94%	106.15	0.42	9.70
MONNOCERA	122.50	-1.61%	101.35	0.82	40.83

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
INTECH	21.70	9.60%	7.28	0.34	90.42
ORIONPHARM	44.90	8.98%	184.66	4.25	10.49
PREMIERCER	68.50	8.21%	5.60	0.08	29.53
ILFSL	4.00	8.11%	22.59	5.75	27.27
DACCADYE	3.10	6.90%	0.45	0.15	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
DBH	96.00	-17.03%	6.70	0.07	11.94
RELIANCINS	37.00	-9.09%	0.37	0.01	6.64
SALVOCHEM	10.80	-8.47%	0.80	0.07	22.50
CENTRALPHL	13.10	-8.39%	37.87	2.76	59.55
REGENTTEX	8.30	-7.78%	4.35	0.51	20.75

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STANDBANKL

Board Meeting schedule under LR 19(1)

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 March 19, 2020 at 3:00 PM to consider, among others, audited financial statements of the Company for the year ended on December 31, 2019.

HAKKANIPUL

Sale Declarations of Sponsor Director

Mr. Md. Golam Mostafa one of the Sponsor Directors of the Company, has expressed his intentions to sell 3,00,000 shares out of his total holding of 13,66,666 shares of the company at prevailing market price (In the Block market) through Stock Exchange (CSE) within next 30 working days.

HAKKANIPUL

Board Meeting schedule under LR 19(1)

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Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BEACONPHAR	62.0	62.0	1	3,000,000	186.0
BXPHARMA	64.4	64.4	1	426,984	27.5
IFIC	10.0	10.0	1	7,844,465	78.4
SQRPHARMA	180.6	178.8	5	221,000	39.8

Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
GLAXOSMITH	Pharmaceutica	16-Apr-20	16-Mar-20	12-Mar-20	15-Mar-20
PRIMEINSUR	G. Insurance		12-Mar-20	1-Mar-20	11-Mar-20
IPDC	NBFI	31-Mar-20	15-Mar-20	11-Mar-20	12-Mar-20
UNITEDFIN	NBFI		12-Mar-20		
LINDEBD	Fuel & Power		12-Mar-20		
IDLC	NBFI		12-Mar-20		
BATBC	Food & Allied		12-Mar-20		

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We calculate our target price by weighting DCF, DDM, SOTP, asset-based and other relative valuation methods, and applying appropriate premiums/ discounts and/or other relevant adjustments.

Expected absolute returns are calculated as the percentage of difference between our target price and latest close price. Stock recommendations are based on absolute upside (downside) and have a 12-month horizon. Please note that future price fluctuations could lead to a temporary mismatch between upside/downside for a stock and our recommendation.

Recommendation Type	Holding period (if not otherwise mentioned)	Absolute Return Potential
Buy	12 Months	More than +15%
Neutral/ Hold	12 Months	Between +15 % and -5 %
Underweight	12 Months	Less than -5 %

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Contact Us

Research Team

Rajib Kumar Das	Head of Research	rajib.das@ucb.com.bd	+880 1730 797 728
Md. Sakib Chowdhury, CFA	Deputy Head of Research	sakib.chowdhury@ucb.com.bd	+880 1713 205 698
Md. Nazmus Sakib	Research Associate	nazmus.sakib@ucb.com.bd	+880 1701 205 073
Anik Mahmood Ibne Anwar	Research Associate	anik.mahmood@ucb.com.bd	+880 1701 205 074
Shadman Sadique Kamal	Research Associate	shadman.kamal@ucb.com.bd	+880 1701 205 096
Md. Asif Muntasir Shakkhor	Research Associate	asif.muntasir@ucb.com.bd	+880 1713 205 696

Investment Strategist

Syed Adnan Huda, CFA	Vice President	adnan.huda@ucb.com.bd	+880 1730 325 232
Md. Hasib Reza, CFA	Assistant Vice President	hasib.reza@ucb.com.bd	+880 1755 658 997

Institutional & Foreign Trade

Sonchoy Saha, CFA	Head of Institutional Sales	sonchoy.kumer@ucb.com.bd	+880 1755 615 313
Tahmidur Rahman	Senior Executive Officer	rahman.tahmidur@ucb.com.bd	+880 1726 995 520

Office Premises

Head Office

1st Floor
6, Dilkusha C/A
Dhaka 1000
Bangladesh

Corporate Office

Bulus Center
(Level-2)
Plot-CWS (A)-1, Road No - 34
Gulshan Avenue
Dhaka 1212
Bangladesh

DSE Extension Office

Room - 633, 9/E DSE Annex Building
5th Floor
Motijheel C/A
Dhaka 1000
Bangladesh

Extension of Main Office

NIK Tower (4th Floor)
55 Dilkusha C/A
Dhaka-1000
Bangladesh

Chattogram Office

Muntasir Centre (5th Floor)
253, Wasa Circle, Dampara
Khulshi, Chattogram
Bangladesh