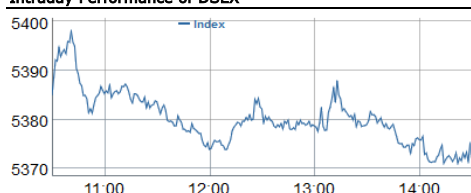


MARKET DOWN 12.71 POINTS

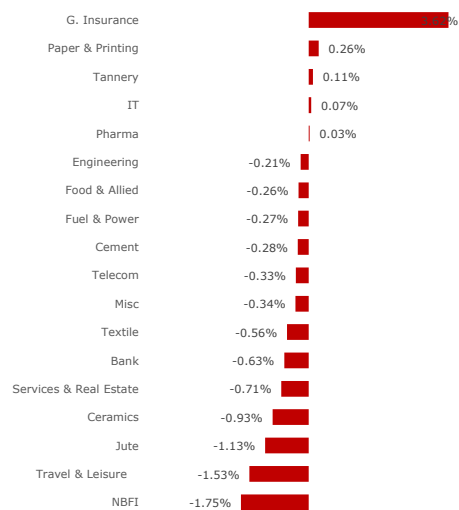
Market closed flat as pressing issues like hike in gas price, post-budget conundrum and uncertainty over June-ending scrips' earnings and dividend declaration has tamped investors' confidence. Broad index, DSEX, lost 12.71 points fetching a turnover of BDT 5.08bn. Meanwhile, investors who undertook position on stocks for availing tax rebate started their sell-off from the beginning of new fiscal year intensifying the downward pressure on index.

Among major sectors, NBFI, Ceramics and Bank faced correction. NATLIFEINS, RUNNERAUTO and UPGDCL topped the turnover chart. Investors' activities were mostly concentrated on Textile, Engineering and Pharmaceuticals sectors.

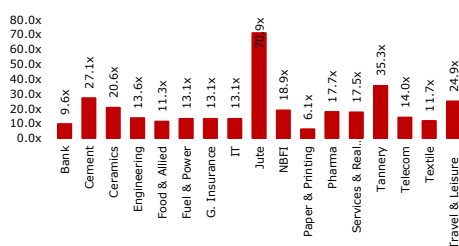
Intraday Performance of DSEX



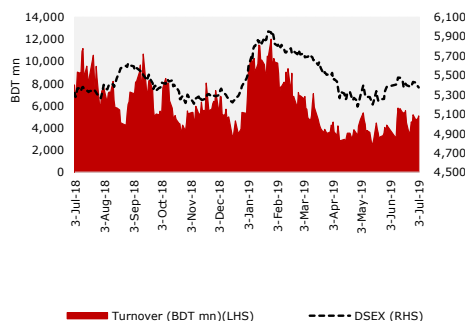
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,372.21	(12.71)	-0.24%	5,385.64	-0.25%
DS30	1,909.67	(2.91)	-0.15%	1,880.78	1.54%
DSES	1,233.98	(1.19)	-0.10%	1,232.82	0.09%
Dow Jones IA	26,786.68	69.25	0.26%	22,878.45	17.08%
Nikkei 225	21,638.16	(116.11)	-0.53%	20,077.62	7.77%
FTSE 100	7,611.20	52.01	0.69%	6,617.38	15.02%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	5,075	4,827	247.63	5.13%	3,950
Turnover (USD mn)	60.41	57.47	2.95	5.13%	47
Volume (mn)	135	146	(10.77)	-7.37%	110
Market Cap (BDT bn)	3,971	3,981	(10.25)	-0.26%	
Market Cap (USD bn)	47	47	(0.12)	-0.26%	
Market P/E (x)	13.49				
Particulars	Gainer	Loser	Unchanged		
Market Breadth	126	177	50		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	541,481	13.64%	-0.6%	270.7	5.34%
Telecom	506,976	12.77%	-0.3%	118.4	2.33%
Pharma	482,285	12.15%	0.0%	494.5	9.74%
Fuel & Power	474,193	11.94%	-0.3%	258.0	5.08%
Food & Allied	306,038	7.71%	-0.3%	163.8	3.23%
NBFI	172,315	4.34%	-1.7%	129.2	2.55%
Engineering	150,010	3.78%	-0.2%	847.5	16.70%
Misc	108,200	2.73%	-0.3%	232.6	4.58%
Textile	92,613	2.33%	-0.6%	866.9	17.08%
Cement	87,781	2.21%	-0.3%	35.0	0.69%
G. Insurance	50,334	1.27%	3.6%	402.8	7.94%
Tannery	25,646	0.65%	0.1%	92.1	1.82%
Ceramics	24,393	0.61%	-0.9%	111.4	2.20%
Travel & Leisure	20,768	0.52%	-1.5%	42.1	0.83%
Services & Real Estate	17,239	0.43%	-0.7%	26.6	0.52%
IT	12,412	0.31%	0.1%	142.5	2.81%
Jute	3,878	0.10%	-1.1%	10.6	0.21%
Paper & Printing	2,189	0.06%	0.3%	76.5	1.51%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
NATLIFEINS	243.70	5.00%	151.39	0.63	-
RUNNERAUTO	109.30	3.21%	145.09	1.34	22.90
UPGDCL	378.20	-0.53%	122.89	0.32	22.02
SINGERBD	201.10	3.87%	109.12	0.55	31.42
MONNOCERA	192.10	-3.56%	103.35	0.53	22.34

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
DHAKAINS	31.40	9.79%	16.27	0.53	14.81
ZEALBANGLA	39.40	9.44%	0.00	0.00	n/a
PEOPLESINS	21.40	8.63%	19.90	0.94	11.89
JANATAINS	18.00	8.43%	7.02	0.40	18.75
1STPRIMFMF	15.90	8.16%	41.02	2.59	16.56

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SEMILLECMF	7.90	-7.06%	1.38	0.17	7.31
BEACHHATCH	15.30	-6.71%	2.86	0.18	n/a
MONNOSTAF	947.20	-5.38%	31.48	0.03	124.63
ALLTEX	10.60	-5.36%	1.44	0.14	n/a
KAY&QUE	197.30	-4.22%	4.26	0.02	227.65

TITASGAS

TITASGAS: Re-fixation of Gas Price Rate

The Company has informed that as per publication dated on 30.06.2019 by the Bangladesh Energy Regulatory Commission and as per power exercised under Sections 22(Kha) and 34 of the Bangladesh Energy Regulatory Commission Act, 2003, the Gas Price Rate of the Titas Gas Transmission and Distribution Company Limited has been re-fixed by the Commission in the consumer level. The following re-fixed price per cubic meter, for supplying to different consumer level, will be effective from 01.07.2019 respectively: (1) Electricity: Tk. 4.45, (2) Captive power: Tk. 13.85, (3) Fertilizer: Tk. 4.45, (4) Industry: Tk. 10.70, (5) Tea Garden: Tk. 10.70, (6) Commercial: Hotel & Restaurant Tk. 23.00 and Small & Cottage Industries Tk. 17.04 respectively, (7) CNG: Tk. 43.00, (8) Household: a) Meter Based: Tk. 12.60, b) 1 burner (fixed per month): Tk. 925.00, c) 2 burners (fixed per month): Tk. 975.00 respectively. They also informed that (1) Charge for customers of small and cottage industries in the commercial customer category shall remain unchanged. (2) The existing minimum charge has been withdrawn. (3) In case of other subscribers except households, demand charges of Tk. 0.10 have been imposed against the monthly sanctioned load per cubic meter. (4) Price rate of feed gas of Tk. 35.00 and operator margin of Tk. 8.00 has been included in the per cubic meter rate of CNG. Other prevailing conditions in the rules of gas distribution service shall remain unchanged.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BRACBANK	65.0	64.9	4	3,200,000	207.8
BXPHARMA	82.5	82.5	1	90,000	7.4
DHAKAINS	30.5	30.5	1	30,000	0.9
DOREENPWR	72.2	72.2	1	30,000	2.2
FASFIN	9.5	9.5	1	60,000	0.6
GLOBALINS	29.5	29.5	1	20,000	0.6
GP	360.0	360.0	1	256,000	92.2
LHBL	36.1	36.1	1	166,000	6.0
NURANI	17.4	17.4	1	85,000	1.5
PARAMOUNT	21.0	21.0	1	45,000	0.9
PRIMEFIN	10.2	10.2	1	4,518,339	46.1
PRIMETEX	35.0	35.0	1	100,000	3.5
PTL	61.0	61.0	1	10,000	0.6
SHASHADNIM	52.0	52.0	1	18,000	0.9
SHURWID	36.3	36.3	1	34,000	1.2
SIMTEX	27.3	27.3	2	330,000	9.0
SINGERBD	195.0	194.0	5	191,691	37.2
SINOBANGLA	62.2	61.5	2	30,000	1.9

Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
KAY&QUE	Engineering			Compulsory Spot	
AZIZPIPES	Engineering			Compulsory Spot	
RUPALIBANK	Bank	17-Jun-19			
PHOENIXFIN	NBFI	20-Jun-19			
SOUTHEASTB	Bank	23-Jun-19			
REPUBLIC	G. Insurance	27-Jun-19			
CENTRALINS	G. Insurance	29-Jun-19			
RUPALIINS	G. Insurance	3-Jul-19			
IFIC	Bank	4-Jul-19			
DHAKAINS	G. Insurance	27-Jun-19			
ICBIBANK	Bank	11-Jul-19			
ISLAMIINS	G. Insurance	27-Jul-19			
EASTERNINS	G. Insurance	30-Jul-19			
ABBANK	Bank	26-Jun-19			
UNIONCAP	NBFI	20-Jun-19			
MERCANBANK	Bank	20-Jun-19			
MARICO	Pharma	24-Jul-19			
SHAHJABANK	Bank	25-Jul-19			
NCCBANK	Bank	30-Jul-19			

Compulsory Spot: BSEC (Order No. BSEC/Surveillance/2018-912/32) has directed the Dhaka Stock Exchange Limited to place these shares in compulsory Spot Market for trading with relevant clearing and settlement regulations applicable for the trades in the Spot market as BSEC has observed irregularities in trading.

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