

## MARKET DOWN 26.48 POINTS

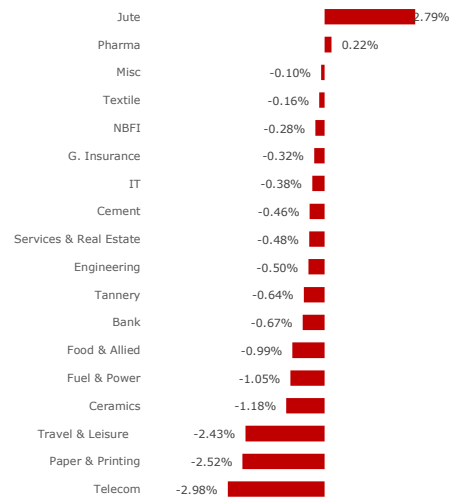
Market continued to bleed as Telecommunication and Bank sector took further toll. Broad index, DSEX, lost 26.48 points extending the losing streak to five consecutive sessions. Turnover fell by 10.85% to BDT 3.95bn. Tussle between GP and regulators led foreign and local investors to put sell pressure on GP which holds 10.63% of total market capitalization. GP fell by 3.09% in today's session. Moreover, Government's increasing borrowing from bank would create dearth in liquidity in private sector. The scenario erupted cautious outlook among investors.

Among major sectors, Pharmaceuticals posted positive return while Telecommunication, Fuel & Power and Food & Allied faced correction. MONNOCERA, MONNOSTAF and STYLECRAFT topped the turnover chart indicating investors' heightened focus on small cap scrips.

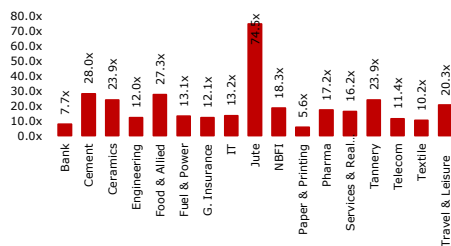
### Intraday Performance of DSEX



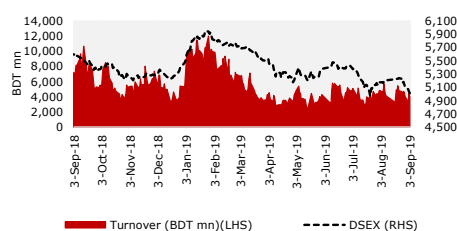
### Sector Return



### Sector P/E



### 52 Week Daily Turnover & DSEX



### Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,007.06	(26.48)	-0.53%	5,385.64	-7.03%
DS30	1,759.12	(15.89)	-0.90%	1,880.78	-6.47%
DSES	1,167.14	(5.26)	-0.45%	1,232.82	-5.33%
Dow Jones IA	26,403.28	41.03	0.16%	22,878.45	15.41%
Nikkei 225	20,625.16	4.97	0.02%	20,077.62	2.73%
FTSE 100	7,266.81	(15.13)	-0.21%	6,617.38	9.81%

### Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	3,948	4,429	(480.77)	-10.85%	4,388
Turnover (USD mn)	47.00	52.73	(5.72)	-10.85%	52
Volume (mn)	91	106	(15.70)	-14.75%	136
Market Cap (BDT bn)	3,743	3,768	(25.27)	-0.67%	
Market Cap (USD bn)	45	45	(0.30)	-0.67%	
Market P/E (x)	12.96				

Particulars	Gain	Loser	Unchanged
Market Breadth	109	169	61

### Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	503,134	13.44%	-0.7%	229.3	5.81%
Pharma	492,014	13.14%	0.2%	696.7	17.64%
Fuel & Power	469,497	12.54%	-1.0%	255.2	6.46%
Telecom	416,535	11.13%	-3.0%	111.5	2.82%
Food & Allied	272,163	7.27%	-1.0%	129.1	3.27%
NBFI	150,613	4.02%	-0.3%	55.8	1.41%
Engineering	137,063	3.66%	-0.5%	660.7	16.73%
Misc	111,866	2.99%	-0.1%	216.4	5.48%
Cement	81,264	2.17%	-0.5%	15.6	0.40%
Textile	81,009	2.16%	-0.2%	397.8	10.08%
G. Insurance	46,651	1.25%	-0.3%	119.6	3.03%
Ceramics	24,960	0.67%	-1.2%	322.3	8.16%
Tannery	24,481	0.65%	-0.6%	166.6	4.22%
Travel & Leisure	18,907	0.51%	-2.4%	24.9	0.63%
Services & Real Estate	15,962	0.43%	-0.5%	27.7	0.70%
IT	12,553	0.34%	-0.4%	133.3	3.38%
Jute	4,075	0.11%	2.8%	49.3	1.25%
Paper & Printing	2,013	0.05%	-2.5%	14.1	0.36%

### Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
MONNOCERA	229.50	-3.45%	278.74	1.19	26.69
MONNOSTAF	1719.00	0.66%	184.73	0.11	226.18
STYLECRAFT	867.80	7.49%	145.18	0.17	109.76
UPGDCL	386.30	-2.13%	94.38	0.24	24.02
GP	294.70	-3.09%	93.09	0.31	11.02

### Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
MEGCONMILK	16.10	9.52%	0.23	0.01	n/a
DSHGARME	199.30	9.09%	8.94	0.05	83.51
ZEALBANGLA	32.80	8.97%	0.08	0.00	n/a
GEMINISEA	273.20	8.71%	26.92	0.10	305.82
STYLECRAFT	867.80	7.49%	145.18	0.17	109.76

### Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
IMAMBUTTON	20.10	-9.46%	1.67	0.08	n/a
CNATEX	2.60	-7.14%	0.42	0.16	3.61
SINOBANGLA	71.80	-5.03%	31.13	0.43	40.19
DULAMIACOT	47.30	-5.02%	0.30	0.01	n/a
DACCADYD	3.80	-5.00%	0.15	0.04	n/a

## Daily Market Review

Market continued to bleed as Telecommunication and Bank sector took further toll  
3-Sep-2019

### CONFIDCEM

#### CONFIDCEM: Purchase 51% Stake of a Company & Commercial Operation

The Company has informed that the Board of Directors has approved the purchase of 51,00,000 ordinary shares of Tk.10.00 each of Zodiac Power Chittagong Limited with effect from August 06, 2019 which is 51% stake in the equity of the Zodiac Power Chittagong Limited and made it a subsidiary of the company. Zodiac Power Chittagong Limited is an Independent Power Producer company having 54.363 MW HFO based Power Plant located at Kolagao, Patiya, Chattogram. The Company also informed that upon successful testing and commissioning the Zodiac Power Chittagong Limited, a 51% subsidiary of the Confidence Cement Limited, has started commercial operation of its HFO based, Net 54.363 MW Power Plant consisting of the Unit of MAN Engines supplied along with related auxiliaries by Germany with effect from August 30, 2019 to sell the whole production of electricity to the Bangladesh Power Development Board (BPDB).

### GENEXIL

#### GENEXIL: Service Agreement with Robi Axiata Limited

The Company has informed that the Board of Directors has approved an agreement of 5 years duration, with Robi Axiata Limited, Dhaka, Bangladesh for contact of offer and sell Multi-Play Service to Robi customers via the Company's ISP license which will increase the total revenue of the company.

### Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BEACONPHAR	26.0	25.6	11	3,301,000	85.3
BRACBANK	56.7	56.4	7	1,093,000	61.9
MEGHNALIFE	59.1	59.1	2	74,910	4.4
PRAGATILIF	155.0	155.0	1	34,000	5.3
SAIHAMCOT	24.1	24.1	1	40,000	1.0
SHURWID	25.0	25.0	1	250,000	6.3
SINGERBD	205.5	205.5	2	53,000	10.9
SQRPHARMA	250.0	250.0	1	50,000	12.5
SSSTEEL	32.0	32.0	2	242,087	7.7

### Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
KAY&QUE	Engineering			Compulsory Spot	
AZIZPIPES	Engineering			Compulsory Spot	
SANDHANINS	L. Insurance	29-Sep-19	3-Sep-19		
RSRMSTEEL	Engineering		18-Sep-19		
NPOLYMAR	Engineering	15-Oct-19	22-Sep-19		
DOREENPWR	Fuel & Power	12-Dec-19	13-Oct-19		
PADMALIFE	L. Insurance		13-Oct-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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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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