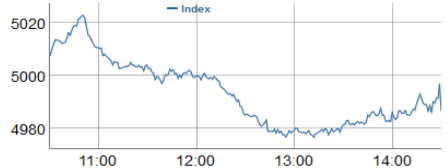


MARKET DOWN 20.69 POINTS

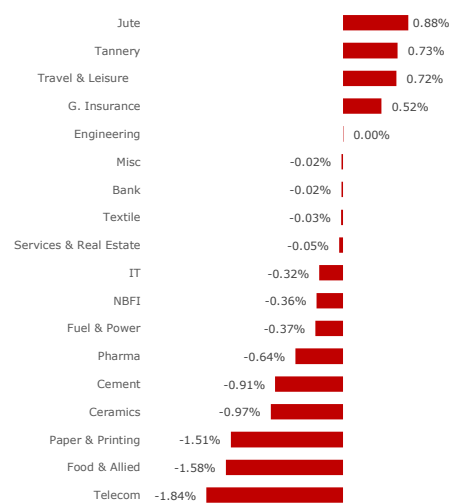
The market has continued its negative sentiment as few big large-cap stocks went down (GP and BATBC). DSEX, lost 20.69 points and extended its downward trend for six sessions in a row. Turnover fell by 4.9% to BDT 3.75 bn. The troubled relationship between GP with the Government has created panic among the investors. The fall of GP's value today (2.54%) indicates the continued fear among the investors. BATBC also shed price (1.6%) as it disclosed lower earnings in the last two quarters and currently trading at relatively high P/E (x) of 27.7.

Most of the major sectors experienced negative return and only Engineering sector is marginally positive (0.01%). MONNOCERA, STYLECRAFT, MONNOSTAF topped the turnover chart which is a continuing pattern of investor's focus on small cap stocks.

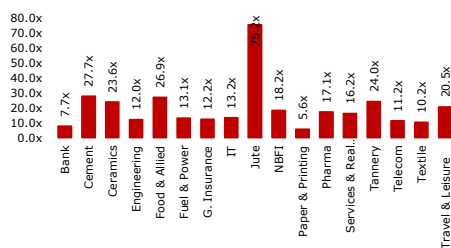
Intraday Performance of DSEX



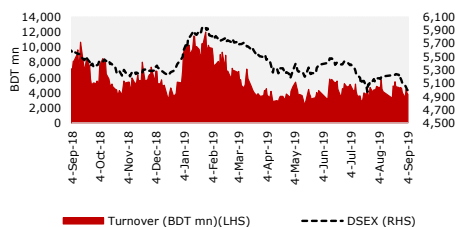
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	4,986.37	(20.69)	-0.41%	5,385.64	-7.41%
DS30	1,748.42	(10.70)	-0.61%	1,880.78	-7.04%
DSES	1,158.78	(8.36)	-0.72%	1,232.82	-6.01%
Dow Jones IA	26,118.02	(285.26)	-1.08%	22,878.45	14.16%
Nikkei 225	20,649.14	23.98	0.12%	20,077.62	2.85%
FTSE 100	7,320.55	52.36	0.72%	6,617.38	10.63%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	3,755	3,948	(193.14)	-4.89%	4,383
Turnover (USD mn)	44.70	47.00	(2.30)	-4.89%	52
Volume (mn)	92	91	1.04	1.14%	135
Market Cap (BDT bn)	3,725	3,743	(18.42)	-0.49%	
Market Cap (USD bn)	44	45	(0.22)	-0.49%	
Market P/E (x)	12.88				
Particulars	Gain	Loser	Unchanged		
Market Breadth	132	166	53		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	503,014	13.50%	0.0%	229.1	6.10%
Pharma	488,844	13.12%	-0.6%	795.3	21.18%
Fuel & Power	467,752	12.56%	-0.4%	334.9	8.92%
Telecom	408,867	10.98%	-1.8%	94.6	2.52%
Food & Allied	267,870	7.19%	-1.6%	133.6	3.56%
NBFI	150,074	4.03%	-0.4%	48.6	1.29%
Engineering	137,063	3.68%	0.0%	603.4	16.07%
Misc	111,840	3.00%	0.0%	120.8	3.22%
Textile	80,985	2.17%	0.0%	367.8	9.80%
Cement	80,523	2.16%	-0.9%	18.3	0.49%
G. Insurance	46,892	1.26%	0.5%	127.0	3.38%
Ceramics	24,717	0.66%	-1.0%	229.7	6.12%
Tannery	24,661	0.66%	0.7%	166.9	4.44%
Travel & Leisure	19,042	0.51%	0.7%	35.0	0.93%
Services & Real Estate	15,954	0.43%	-0.1%	13.9	0.37%
IT	12,512	0.34%	-0.3%	154.5	4.11%
Jute	4,111	0.11%	0.9%	30.2	0.80%
Paper & Printing	1,982	0.05%	-1.5%	15.3	0.41%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
MONNOCERA	217.60	-5.19%	199.75	0.90	25.30
STYLECRAFT	851.40	-1.89%	158.17	0.18	107.68
RENATA	1228.00	2.44%	134.49	0.11	29.35
MONNOSTAF	1676.90	-2.45%	134.48	0.08	220.64
UPGDCL	384.60	-0.44%	129.54	0.34	23.92

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SEAPEARL	30.20	9.82%	27.68	0.94	37.13
SEMLIBLSF	9.70	8.99%	13.04	1.38	17.02
PF1STMF	6.90	7.81%	21.08	3.19	14.08
KAY&QUE	236.50	7.50%	42.98	0.19	272.88
SHYAMPSUG	24.50	7.46%	0.01	0.00	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
RELIANCE1	8.80	-9.28%	5.66	0.64	9.89
GRAMEENS2	11.30	-8.13%	2.05	0.18	10.09
SANDHANINS	22.40	-7.82%	3.30	0.15	-
IFILISLMF1	6.00	-7.69%	1.63	0.27	11.54
ICB3RNRB	5.00	-7.41%	0.36	0.07	13.16

Daily Market Review

Market has continued its negative sentiment
4-Sep-2019

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
GP	289.4	289.4	1	4,781	1.4
GREENDELMF	7.7	7.7	2	417,097	3.2
RENWICKJA	1,568.0	1,568.0	1	320	0.5
SSSTEEL	32.2	32.2	1	200,000	6.4
UPGDCL	391.5	391.2	2	22,570	8.8

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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