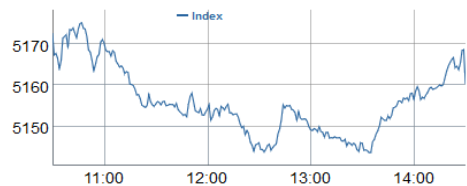


MARKET DOWN 12.49 POINTS

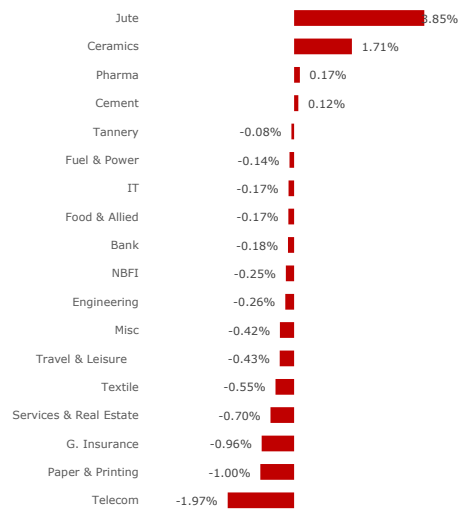
Market experienced some volatility throughout today's session and last hour buying pressure subdued significant fall in index. Broad index, DSEX, shed 12.49 points with a turnover of BDT 4.7bn. Investors are adopting cautious stance prior to year-end declaration of June-end scrips. Meanwhile, Finance Minister hinted that Bangladesh Bank would issue notice on capping interest rates. Government hasn't backed off from taking measures to ensure lower interest rates. Investors are indecisive in this matter and waiting to see how Government and BB adopts measures to bring down interest rates.

Among major sectors, Ceramics and Pharmaceuticals posted positive return while Telecommunication, General Insurance and Textile faced correction. SQRPHARMA, MONNOCERA and UPGDCL topped the turnover chart.

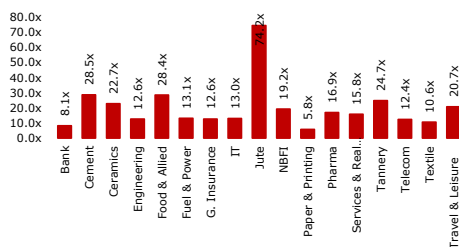
Intraday Performance of DSEX



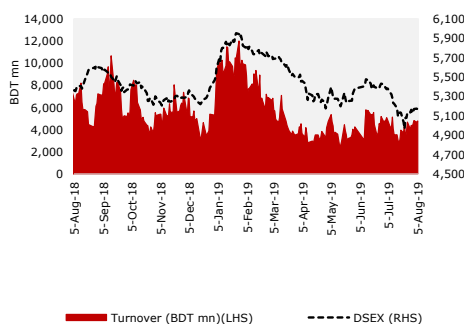
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,160.37	(12.49)	-0.24%	5,385.64	-4.18%
DS30	1,826.69	(10.10)	-0.55%	1,880.78	-2.88%
DSES	1,189.69	(4.26)	-0.36%	1,232.82	-3.50%
Dow Jones IA	26,485.01	(98.41)	-0.37%	22,878.45	15.76%
Nikkei 225	20,720.29	(366.87)	-1.74%	20,077.62	3.20%
FTSE 100	7,252.57	(154.49)	-2.09%	6,617.38	9.60%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,774	4,639	135.08	2.91%	4,121
Turnover (USD mn)	56.83	55.22	1.61	2.91%	49
Volume (mn)	126	136	(9.54)	-7.03%	134
Market Cap (BDT bn)	3,846	3,866	(19.87)	-0.51%	
Market Cap (USD bn)	46	46	(0.24)	-0.51%	
Market P/E (x)	13.37				

Particulars	Gain	Loser	Unchanged
Market Breadth	130	183	40

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	533,812	13.88%	-0.2%	262.8	5.51%
Pharma	485,369	12.62%	0.2%	792.8	16.61%
Fuel & Power	466,712	12.13%	-0.1%	315.3	6.60%
Telecom	454,072	11.80%	-2.0%	121.6	2.55%
Food & Allied	282,696	7.35%	-0.2%	119.5	2.50%
NBFI	157,946	4.11%	-0.2%	63.7	1.33%
Engineering	142,513	3.71%	-0.3%	544.2	11.40%
Misc	112,936	2.94%	-0.4%	295.9	6.20%
Textile	84,063	2.19%	-0.6%	589.4	12.35%
Cement	82,920	2.16%	0.1%	28.9	0.61%
G. Insurance	48,662	1.27%	-1.0%	218.2	4.57%
Tannery	25,172	0.65%	-0.1%	200.8	4.21%
Ceramics	23,760	0.62%	1.7%	298.0	6.24%
Travel & Leisure	19,225	0.50%	-0.4%	45.5	0.95%
Services & Real Estate	15,573	0.40%	-0.7%	24.2	0.51%
IT	12,361	0.32%	-0.2%	141.9	2.97%
Jute	4,056	0.11%	3.9%	23.6	0.50%
Paper & Printing	2,066	0.05%	-1.0%	18.2	0.38%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SQRPHARMA	252.80	0.40%	273.27	1.08	15.89
MONNOCERA	218.00	6.71%	250.37	1.24	25.35
UPGDCL	384.20	-0.03%	162.96	0.43	23.89
BSC	61.60	2.33%	156.89	2.58	26.25
MONNOSTAF	1184.40	5.82%	142.31	0.13	155.84

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
AL-HAJTEX	64.30	9.91%	55.57	0.88	n/a
PRAGATILIF	121.60	9.85%	21.89	0.18	-
ICBAGRANI1	7.50	8.70%	6.04	0.82	14.06
BIFC	2.60	8.33%	0.10	0.04	n/a
PRIMEICBA	6.20	6.90%	1.35	0.22	10.11

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SEMLIBLSF	9.80	-6.67%	12.13	1.17	10.50
BDWELDING	19.20	-6.34%	4.64	0.24	n/a
TALLUSPIN	3.80	-5.00%	0.04	0.01	n/a
UNITEDINS	62.20	-3.86%	4.48	0.07	23.38
MAKSONSPIN	5.50	-3.51%	1.64	0.29	68.75

Daily Market Review

Market closed flat amid volatility throughout the session

5-Aug-2019

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AL-HAJTEX	61.1	61.1	1	9,100	0.6
ANWARGALV	86.0	86.0	1	18,000	1.5
BRACBANK	62.3	62.2	7	800,000	49.8
FUWANGFOOD	13.2	13.2	1	527,000	7.0
IPDC	25.0	25.0	1	995,000	24.9
PRAGATIINS	32.0	32.0	2	50,000	1.6
RUPALILIFE	49.0	49.0	1	50,000	2.5
SILCOPHL	28.2	28.0	2	180,000	5.1
STANCERAM	285.0	285.0	1	3,000	0.9
VFSTDL	47.4	47.4	6	675,000	32.0

Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
KAY&QUE	Engineering			Compulsory Spot	
AZIZPIPES	Engineering			Compulsory Spot	
MEGHNALIFE	L. Insurance	26-Sep-19	1-Sep-19		
GP	Telecom		4-Aug-19	31-Jul-19	1-Aug-19
FAREASTFIN	NBFI	4-Sep-19	19-Aug-19	31-Jul-19	18-Aug-19
MARICO	Pharma		20-Aug-19		
PROGRESLIF	L. Insurance	12-Sep-19	22-Aug-19		
EBLNRBMF	Mutual Fund		27-Aug-19		
PHPMF1	Mutual Fund		27-Aug-19		
POPULAR1MF	Mutual Fund		27-Aug-19		
NATLIFEINS	L. Insurance	25-Sep-19	22-Aug-19		
SANDHANINS	L. Insurance	29-Sep-19	3-Sep-19		
EXIM1STMF	Mutual Fund		27-Aug-19		
FBFIF	Mutual Fund		27-Aug-19		
1JANATAMF	Mutual Fund		27-Aug-19		
IFIC1STMF	Mutual Fund		27-Aug-19		
TRUSTB1MF	Mutual Fund		27-Aug-19		
EBL1STMF	Mutual Fund		27-Aug-19		
RUPALILIFE	L. Insurance	26-Sep-19	29-Aug-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
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Neutral/ Hold	12 Months	Between +15 % and -5 %
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CONTACT US

Research Team

Rajib Kumar Das Md. Nazmus Sakib	Head of Research Research Associate	rajib.das@ucb.com.bd nazmus.sakib@ucb.com.bd	+ 880 1730 797 728 + 880 1701 205 073
Anik Mahmood Ibne Anwar Shadman Sadique Kamal	Research Associate Research Associate	anik.mahmood@ucb.com.bd shadman.kamal@ucb.com.bd	+ 880 1701 205 074 + 880 1701 205 096

Institutional and Foreign Trade Department

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

Head Office

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

Corporate Office

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

DSE Extension Office

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

Chattogram Office

Ayub Trade Center
1269/B SK Mujib Road (4th Floor)
Agrabad C/A, Chattogram

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