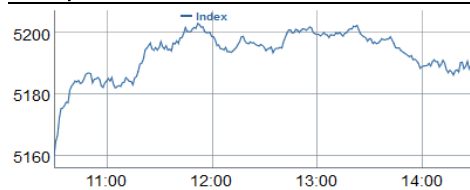


MARKET UP 26.92 POINTS

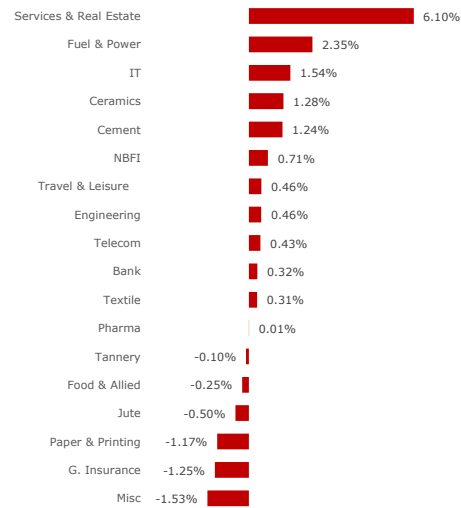
Market remained upbeat throughout the day driven by large cap scrips namely UPGDCL, KPCL and GP. Broad index, DSEX went up by 26.92 points. Pre-Eid sell off waned and investors started injecting fund to take position in undervalued stocks. Investors' participation improved significantly. Turnover improved by 19.15% to BDT 5.7bn.

Among major sectors, Services & Real Estate, Fuel & Power and IT posted positive return while Miscellaneous, General Insurance and Food & Allied faced correction. UPGDCL, MONNOCERA and BSC topped the turnover chart.

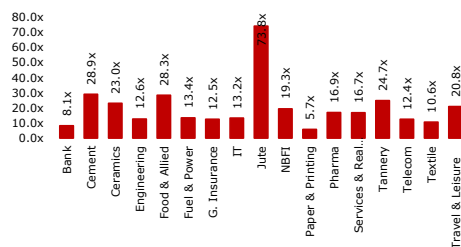
Intraday Performance of DSEX



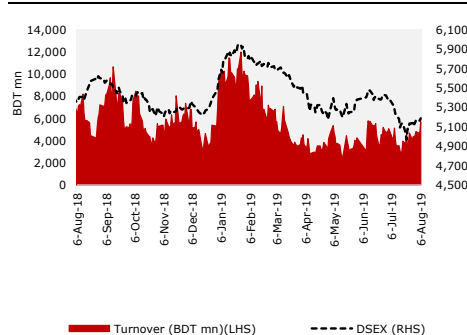
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

| Particulars | Value | Δ Points | Daily Δ % | Dec'18 Value | YTD Δ % |
|--------------|-----------|----------|-----------|--------------|---------|
| DSEX | 5,187.29 | 26.92 | 0.52% | 5,385.64 | -3.68% |
| DS30 | 1,836.45 | 9.76 | 0.53% | 1,880.78 | -2.36% |
| DSES | 1,194.35 | 4.67 | 0.39% | 1,232.82 | -3.12% |
| Dow Jones IA | 25,717.74 | (767.27) | -2.90% | 22,878.45 | 12.41% |
| Nikkei 225 | 20,585.31 | (134.98) | -0.65% | 20,077.62 | 2.53% |
| FTSE 100 | 7,224.04 | 0.19 | 0.00% | 6,617.38 | 9.17% |

Market Statistics

| Particulars | Today | Last Day | Daily Δ | Daily Δ % | 60 Day MA |
|---------------------|-------|----------|---------|-----------|-----------|
| Turnover (BDT mn) | 5,688 | 4,774 | 914.03 | 19.15% | 4,138 |
| Turnover (USD mn) | 67.71 | 56.83 | 10.88 | 19.15% | 49 |
| Volume (mn) | 148 | 126 | 21.99 | 17.43% | 134 |
| Market Cap (BDT bn) | 3,863 | 3,846 | 17.00 | 0.44% | |
| Market Cap (USD bn) | 46 | 46 | 0.20 | 0.44% | |
| Market P/E (x) | 13.44 | | | | |

| Particulars | Gain | Loser | Unchanged |
|----------------|------|-------|-----------|
| Market Breadth | 173 | 136 | 45 |

Sector Statistics

| Sector | Market Cap (BDTmn) | % of total Market Cap | Sector Return | Turnover (BDTmn) | % of total Turnover |
|------------------------|--------------------|-----------------------|---------------|------------------|---------------------|
| Bank | 535,510 | 13.86% | 0.3% | 299.1 | 5.26% |
| Pharma | 485,404 | 12.56% | 0.0% | 810.4 | 14.25% |
| Fuel & Power | 477,675 | 12.36% | 2.3% | 708.6 | 12.46% |
| Telecom | 456,026 | 11.80% | 0.4% | 131.7 | 2.31% |
| Food & Allied | 281,995 | 7.30% | -0.2% | 169.8 | 2.98% |
| NBFI | 159,063 | 4.12% | 0.7% | 115.1 | 2.02% |
| Engineering | 143,168 | 3.71% | 0.5% | 679.0 | 11.94% |
| Misc | 111,208 | 2.88% | -1.5% | 361.9 | 6.36% |
| Textile | 84,321 | 2.18% | 0.3% | 669.3 | 11.77% |
| Cement | 83,951 | 2.17% | 1.2% | 38.9 | 0.68% |
| G. Insurance | 48,053 | 1.24% | -1.3% | 223.1 | 3.92% |
| Tannery | 25,147 | 0.65% | -0.1% | 182.9 | 3.22% |
| Ceramics | 24,065 | 0.62% | 1.3% | 245.0 | 4.31% |
| Travel & Leisure | 19,313 | 0.50% | 0.5% | 37.0 | 0.65% |
| Services & Real Estate | 16,523 | 0.43% | 6.1% | 59.5 | 1.05% |
| IT | 12,551 | 0.32% | 1.5% | 185.5 | 3.26% |
| Jute | 4,036 | 0.10% | -0.5% | 19.4 | 0.34% |
| Paper & Printing | 2,041 | 0.05% | -1.2% | 20.1 | 0.35% |

Top Turnover

| Ticker | Close Price (BDT) | Daily Δ % | Turnover (BDTmn) | Volume (mn) | P/E (x) |
|-----------|-------------------|-----------|------------------|-------------|---------|
| UPGDCL | 394.50 | 2.68% | 302.17 | 0.77 | 24.53 |
| MONNOCERA | 219.90 | 0.87% | 203.30 | 0.90 | 25.57 |
| BSC | 58.70 | -4.71% | 188.99 | 3.14 | 25.01 |
| JMISMDL | 483.00 | 8.73% | 183.05 | 0.39 | 73.78 |
| IBP | 25.80 | 1.18% | 142.15 | 5.44 | 17.12 |

Top Gainers

| Ticker | Close Price (BDT) | Daily Δ % | Turnover (BDTmn) | Volume (mn) | P/E (x) |
|-----------|-------------------|-----------|------------------|-------------|---------|
| KPCL | 56.10 | 10.00% | 129.68 | 2.36 | 13.62 |
| SAIFPOWER | 18.00 | 9.76% | 30.14 | 1.71 | 10.63 |
| SAPORTL | 22.60 | 9.71% | 12.25 | 0.55 | 52.97 |
| BENGALWTL | 25.60 | 8.94% | 19.62 | 0.77 | 20.00 |
| JMISMDL | 483.00 | 8.73% | 183.05 | 0.39 | 73.78 |

Top Losers

| Ticker | Close Price (BDT) | Daily Δ % | Turnover (BDTmn) | Volume (mn) | P/E (x) |
|------------|-------------------|-----------|------------------|-------------|---------|
| VFSTDL | 42.50 | -9.96% | 133.07 | 2.95 | 17.61 |
| SEMLFBSLGF | 28.30 | -9.00% | 1.72 | 0.06 | 707.50 |
| ICBAGRANI1 | 6.90 | -8.00% | 6.68 | 0.95 | 12.94 |
| PF1STMF | 6.70 | -6.94% | 8.89 | 1.32 | 11.96 |
| UNITEDAIR | 1.50 | -6.25% | 0.64 | 0.41 | n/a |

Daily Market Review

Market closed positive driven by large cap scrips

6-Aug-2019

VFSTDL

VFSTDL: Decision to Purchase Land

The Company has informed that the Board of Directors of the Company has decided to purchase of 25.8 decimals of land at Gazipur Sador, District Gazipur, at a total cost of Tk. 41,76,750.00 including registration, mutation and other cost for expansion of its production capacity.

Block Trade

| Ticker | Max Price (BDT) | Min Price (BDT) | No. of Trades | Volume | Value (BDTmn) |
|------------|-----------------|-----------------|---------------|-----------|---------------|
| BANKASIA | 19.9 | 17.5 | 2 | 8,845,000 | 169.2 |
| BRACBANK | 62.3 | 62.3 | 2 | 250,000 | 15.6 |
| BXPHARMA | 82.8 | 82.3 | 2 | 173,000 | 14.3 |
| HRTEX | 51.0 | 51.0 | 1 | 25,000 | 1.3 |
| JMISMDL | 465.0 | 465.0 | 1 | 1,100 | 0.5 |
| MARICO | 1,740.0 | 1,740.0 | 7 | 90,000 | 156.6 |
| NAVANACNG | 49.3 | 49.3 | 1 | 89,111 | 4.4 |
| NPOLYMAR | 134.8 | 129.5 | 2 | 59,000 | 7.7 |
| SINOBANGLA | 79.0 | 79.0 | 1 | 6,840 | 0.5 |
| UPGDCL | 390.0 | 390.0 | 10 | 110,000 | 42.9 |
| VFSTDL | 47.4 | 45.0 | 10 | 547,000 | 25.0 |

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 | | |
| 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 |
|---------------------|---|---------------------------|
| Buy | 12 Months | More than +15% |
| Neutral/ Hold | 12 Months | Between +15 % and -5 % |
| Underweight | 12 Months | Less than -5 % |

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