

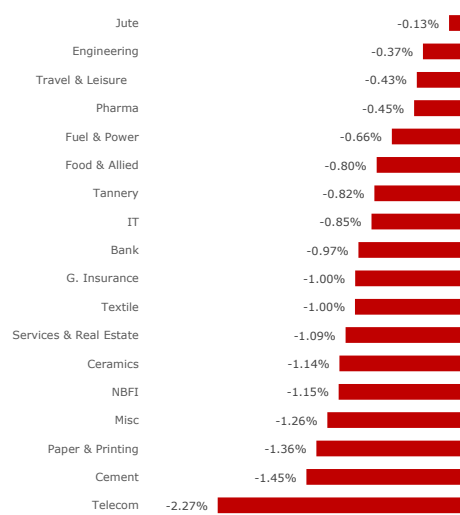
MARKET DOWN 47.71 POINTS

DSEX witnessed sharp fall as ongoing issues like 32.8% hike in gas price by Bangladesh Energy Regulatory Commission (BERC) and imposition of tax on company's retained earnings and stock dividend shook investors' confidence. Besides, resurgence of row between GP and government has also hit investors hard. On Thursday, Bangladesh Telecommunication Regulatory Commission (BTRC) directed the country's IIG operators to reduce their international internet bandwidth to GP by 30% and to Robi (second largest telecom operator of Bangladesh) by 15% on account of non-payment of dues. In reaction, GP said that the move is illegal and they will seek intervention of court against the decision of the regulator. In the meantime, the company lost 2.2% market cap.

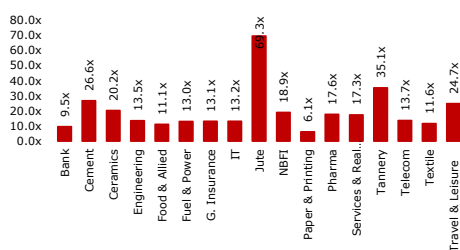
Intraday Performance of DSEX



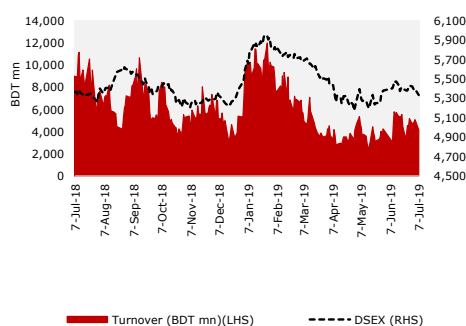
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,333.09	(47.71)	-0.89%	5,385.64	-0.98%
DS30	1,890.38	(19.69)	-1.03%	1,880.78	0.51%
DSES	1,221.46	(11.93)	-0.97%	1,232.82	-0.92%
Dow Jones IA	26,922.12	43.88	0.16%	22,878.45	17.67%
Nikkei 225	21,746.38	43.93	0.20%	20,077.62	8.31%
FTSE 100	7,553.14	(50.44)	-0.66%	6,617.38	14.14%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,153	4,875	(721.96)	-14.81%	3,969
Turnover (USD mn)	49.45	58.04	(8.59)	-14.81%	47
Volume (mn)	173	184	(11.33)	-6.15%	114
Market Cap (BDT bn)	3,942	3,976	(33.19)	-0.83%	
Market Cap (USD bn)	47	47	(0.40)	-0.83%	
Market P/E (x)	13.35				

Particulars Gainer Loser Unchanged

Particulars	Gainer	Loser	Unchanged
Market Breadth	87	239	27

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	539,523	13.68%	-1.0%	228.5	5.50%
Telecom	495,151	12.56%	-2.3%	67.5	1.63%
Pharma	480,112	12.18%	-0.5%	381.2	9.18%
Fuel & Power	469,457	11.91%	-0.7%	164.9	3.97%
Food & Allied	300,753	7.63%	-0.8%	140.1	3.37%
NBFI	172,379	4.37%	-1.2%	79.0	1.90%
Engineering	148,870	3.78%	-0.4%	548.9	13.22%
Misc	106,836	2.71%	-1.3%	219.7	5.29%
Textile	91,751	2.33%	-1.0%	567.6	13.66%
Cement	86,107	2.18%	-1.4%	32.5	0.78%
G. Insurance	50,412	1.28%	-1.0%	501.8	12.08%
Tannery	25,511	0.65%	-0.8%	91.7	2.21%
Ceramics	23,884	0.61%	-1.1%	68.8	1.66%
Travel & Leisure	20,626	0.52%	-0.4%	14.7	0.35%
Services & Real Estate	17,103	0.43%	-1.1%	36.4	0.88%
IT	12,472	0.32%	-0.8%	103.5	2.49%
Jute	3,788	0.10%	-0.1%	16.3	0.39%
Paper & Printing	2,187	0.06%	-1.4%	39.4	0.95%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
JMISMDL	484.00	2.26%	130.94	0.27	73.93
ATCSLGF	12.20	9.91%	127.74	10.67	9.95
RUNNERAUTO	101.50	-4.61%	122.91	1.18	21.26
NATLIFEINS	263.10	-0.27%	113.42	0.43	-
RUPALINS	24.50	8.41%	100.59	4.14	13.32

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
CAPMBDBLMF	8.80	10.00%	10.61	1.21	20.00
SEMLFBSLGF	12.10	10.00%	0.06	0.00	302.50
ATCSLGF	12.20	9.91%	127.74	10.67	9.95
SEMLIBLSLF	8.90	9.88%	5.42	0.61	9.54
1STPRIMFMF	19.10	9.77%	27.18	1.44	19.90

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
GLOBALINS	27.80	-7.64%	37.14	1.30	12.64
ZEALBANGLA	37.00	-6.09%	0.07	0.00	n/a
EMERALDOIL	12.80	-5.88%	0.93	0.07	106.67
HRTEX	50.00	-5.30%	37.45	0.74	27.37
SONARBAINS	35.30	-5.11%	21.99	0.61	18.01

EASTRNLUB

EASTRNLUB: Diversify of EBLB's Business

The company has informed that in order to diversify of EBLB's business, Bangladesh Petroleum Corporation (BPC) has allotted to EBLB 300 M.Ton Bitumen in each month for marketing in Barishal Road Division. In this regard they also informed that the Company may earn a profit of Tk. 7.00 lac (approximate) per year from this business.

DHAKABANK

DHAKABANK: Buy Declaration of a Sponsor

Mrs. Rakhi Das Gupta, one of the Sponsors of the Company, has expressed her intention to buy 2,75,000 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

ISLAMIINS

ISLAMIINS: Credit Rating Result

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the rating of the Company as "A2" in the long term and "ST-3" in the short term along with a stable outlook based on audited financial statements of the Company up to December 31, 2018 and other relevant quantitative as well as qualitative information up to the date of rating declaration.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
1STPRIMFMF	17.4	17.4	1	30,000	0.5
BSC	49.9	49.9	1	40,000	2.0
IBNSINA	242.9	242.9	1	20,000	4.9
IPDC	27.0	27.0	1	740,000	20.0
MEGHNALIFE	67.0	67.0	1	20,000	1.3
RSRMSTEEL	47.9	47.9	2	390,000	18.7
SAIHAMCOT	25.0	25.0	1	50,000	1.3
SILCOPHL	26.3	26.3	1	20,000	0.5
SINOBANGLA	62.5	62.5	1	15,000	0.9
VFSTDL	55.3	55.3	1	45,000	2.5

Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
KAY&QUE	Engineering			Compulsory Spot	
AZIZPIPES	Engineering			Compulsory Spot	
ICBIBANK	Bank	11-Jul-19			
ISLAMIINS	G. Insurance	27-Jul-19			
EASTERNINS	G. Insurance	30-Jul-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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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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