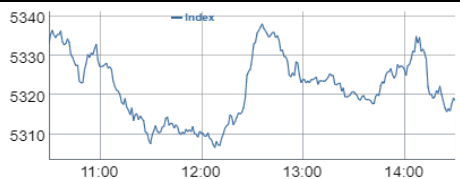


**MARKET DOWN 14.47 POINTS**

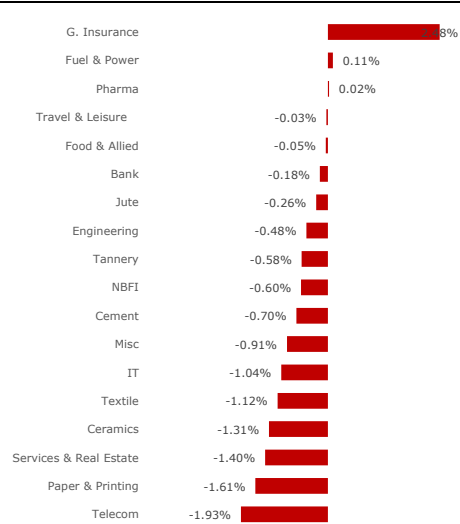
Market witnessed a roller-coaster ride and closed flat as investor lost in wilderness attributing the impact of budget on listed scrips and rise of cost structure of companies' due to gas price hike. Gas price hike hit ceramic, cement and textile sector the most; these sectors lost 4.38%, 3.71% and 1.78% market cap respectively since the declaration by Bangladesh Energy Regulatory Commission (BERC) on June 30. Besides, ongoing tussle between GP and government over unpaid dues took a new turn when the regulators cut down the bandwidth of GP by 30% - the stock fell 1.76% today.

Except Insurance, most of the sectors witnessed correction today. General insurance witnessed 2.48% appreciation.

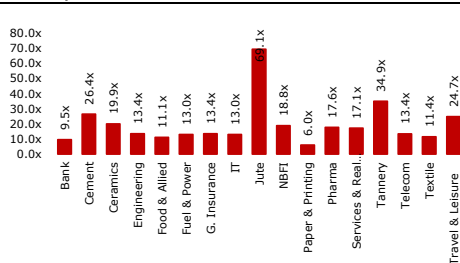
**Intraday Performance of DSEX**



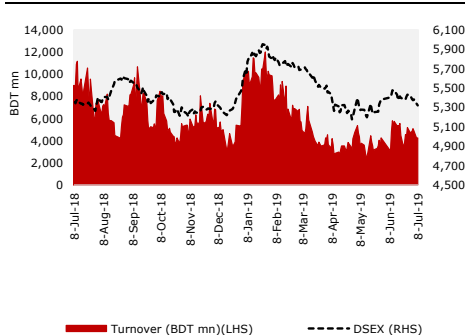
**Sector Return**



**Sector P/E**



**52 Week Daily Turnover & DSEX**



**Index**

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,318.62	(14.47)	-0.27%	5,385.64	-1.24%
DS30	1,886.16	(4.22)	-0.22%	1,880.78	0.29%
DSES	1,216.24	(5.22)	-0.43%	1,232.82	-1.35%
Dow Jones IA	26,922.12	(43.88)	-0.16%	22,878.45	17.67%
Nikkei 225	21,534.35	(212.03)	-0.98%	20,077.62	7.26%
FTSE 100	7,543.77	(9.37)	-0.12%	6,617.38	14.00%

**Market Statistics**

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,247	4,153	93.22	2.24%	3,971
Turnover (USD mn)	50.55	49.45	1.11	2.24%	47
Volume (mn)	147	173	(26.00)	-15.04%	115
Market Cap (BDT bn)	3,929	3,942	(13.11)	-0.33%	
Market Cap (USD bn)	47	47	(0.16)	-0.33%	
Market P/E (x)	13.29				
<b>Particulars</b>	<b>Gainer</b>	<b>Loser</b>	<b>Unchanged</b>		
Market Breadth	116	198	39		

**Sector Statistics**

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	538,542	13.71%	-0.2%	222.9	5.25%
Telecom	485,582	12.36%	-1.9%	90.1	2.12%
Pharma	480,224	12.22%	0.0%	465.0	10.95%
Fuel & Power	469,972	11.96%	0.1%	179.6	4.23%
Food & Allied	300,606	7.65%	0.0%	121.9	2.87%
NBFI	171,350	4.36%	-0.6%	101.4	2.39%
Engineering	148,156	3.77%	-0.5%	491.5	11.57%
Misc	105,863	2.69%	-0.9%	195.1	4.59%
Textile	90,725	2.31%	-1.1%	462.0	10.88%
Cement	85,503	2.18%	-0.7%	36.3	0.86%
G. Insurance	51,661	1.31%	2.5%	548.4	12.91%
Tannery	25,362	0.65%	-0.6%	72.2	1.70%
Ceramics	23,572	0.60%	-1.3%	88.4	2.08%
Travel & Leisure	20,619	0.52%	0.0%	20.9	0.49%
Services & Real Estate	16,865	0.43%	-1.4%	25.6	0.60%
IT	12,342	0.31%	-1.0%	109.5	2.58%
Jute	3,778	0.10%	-0.3%	14.9	0.35%
Paper & Printing	2,152	0.05%	-1.6%	39.3	0.93%

**Top Turnover**

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
NATLIFEINS	271.30	3.12%	188.66	0.70	-
ATCSLGF	12.80	4.92%	109.10	8.27	10.43
RUNNERAUTO	111.60	9.95%	108.84	1.03	23.38
RUPALILIFE	65.90	6.63%	106.86	1.67	-
JMISMDDL	467.10	-3.49%	85.39	0.18	71.35

**Top Gainers**

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
PRAGATILIF	150.70	13.48%	77.56	0.53	-
RUNNERAUTO	111.60	9.95%	108.84	1.03	23.38
SEMLFBSLGF	13.30	9.92%	0.09	0.01	332.50
DHAKAINS	35.60	9.88%	54.13	1.55	16.79
PRIMEINSUR	22.70	9.66%	13.51	0.61	12.90

**Top Losers**

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ICBEPMF1S1	6.40	-9.86%	6.98	1.06	16.00
SEMLIBLSLF	8.20	-7.87%	3.57	0.42	8.79
ICB3RDNRB	6.10	-7.58%	3.75	0.60	14.30
EBL1STMF	7.40	-7.50%	1.98	0.27	13.88
AIBL1STIMF	7.50	-7.41%	0.78	0.10	9.49

### PRAGATILIF

#### PRAGATILIF: EGM to Increase Authorized Capital & Issue Rights Share

The Company has informed that the Board has recommended to issue 2R:1 rights share (2 rights share for each share held) with an issue price of Tk. 15.00 per share each including premium of Tk. 5.00 only per share and also decided to raise Authorized capital from Tk. 25.00 crore to Tk. 100.00 crore subject to the approval of the Shareholders in the EGM, BSEC and other Regulatory Authorities. Date of EGM: 25.08.2019. Time and venue for EGM: 11:00 AM and KIBC Auditorium, Krishibid Institution Bangladesh Complex, (KIBC), South Block, Level # B- 1, Krishi Khamar Sarok, Farmgate, Dhaka - 1215. Record date for EGM: 28.07.2019. Another record date for entitlement of the proposed rights shares will be notified later after obtaining approval from BSEC.

### ABBANK

#### ABBANK: Appointment of President and Managing Director

The Company has informed that Mr. Tarique Afzal has been appointed as the President and Managing Director of the Company with effect from July 08, 2019.

### Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BRACBANK	63.1	62.5	8	800,000	50.1
BSCCL	122.0	122.0	2	80,000	9.8
FEDERALINS	14.6	14.6	1	68,000	1.0
IPDC	27.0	27.0	1	740,000	20.0
NATLIFEINS	272.0	251.0	6	68,150	18.1
NHFIL	45.0	45.0	1	20,000	0.9
RUNNERAUTO	102.0	102.0	1	5,000	0.5
SINOBANGLA	63.0	63.0	1	9,500	0.6
SQURPHARMA	258.2	258.1	3	45,000	11.6

### 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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