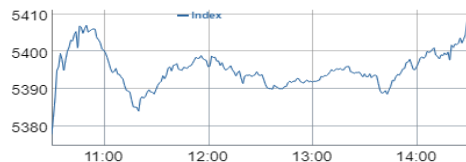


MARKET UP 25.22 POINTS

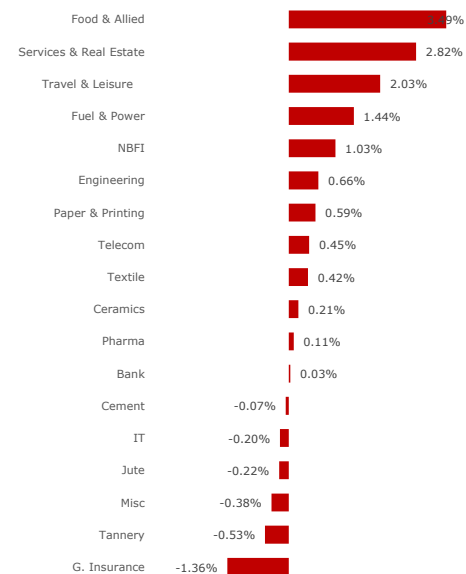
Market passed a positive session after returning from nine-day recess. Investors buying appetite was observable from the beginning of the session amid upcoming budget-centric expectation. At the end of the session, DSEX added 25.22 points and closed at 5,402.97.

General Insurance sector, accounting for 12.28% of the total turnover of the market, dominated the turnover chart today. Among the large cap scrips, BATBC, UPGDCL and GP impacted the index positively while Bank sector scrips i.e. MERCANBANK, SHAHJABANK impacted the index negatively. Anwar Galvanizing Ltd. (DSE Ticker: ANWARGALV) has informed that the production activities of Brake Drum will remain closed until the next announcement. Production place and management of Brake Drum will be used for the production of GI fittings due to increase of comparative profitability.

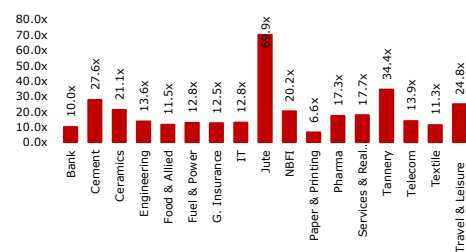
Intraday Performance of DSEX



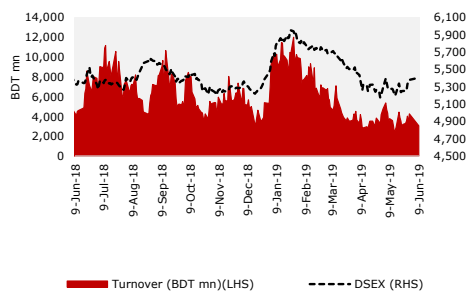
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,402.97	25.22	0.47%	5,385.64	0.32%
DS30	1,889.04	12.44	0.66%	1,880.78	0.44%
DSES	1,220.08	5.82	0.48%	1,232.82	-1.03%
Dow Jones IA	25,983.94	263.28	1.02%	22,878.45	13.57%
Nikkei 225	20,884.71	110.67	0.53%	20,077.62	4.02%
FTSE 100	7,331.94	72.09	0.99%	6,617.38	10.80%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	3,047	4,250	(1,203.37)	-28.31%	3,955
Turnover (USD mn)	36.27	50.60	(14.33)	-28.31%	47
Volume (mn)	91	115	(24.48)	-21.23%	98
Market Cap (BDT bn)	3,967	3,942	25.79	0.65%	
Market Cap (USD bn)	47	47	0.31	0.65%	
Market P/E (x)	13.56				
Particulars	Galner	Loser	Unchanged		
Market Breadth	171	125	49		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	566,644	14.28%	0.0%	250.6	8.23%
Telecom	504,861	12.73%	0.5%	77.9	2.56%
Pharma	468,468	11.81%	0.1%	198.1	6.50%
Fuel & Power	463,340	11.68%	1.4%	331.7	10.89%
Food & Allied	311,952	7.86%	3.5%	85.3	2.80%
NBFI	186,396	4.70%	1.0%	274.3	9.00%
Engineering	150,573	3.80%	0.7%	342.7	11.25%
Misc	107,543	2.71%	-0.4%	117.6	3.86%
Textile	89,755	2.26%	0.4%	257.9	8.46%
Cement	89,281	2.25%	-0.1%	21.5	0.71%
G. Insurance	48,088	1.21%	-1.4%	374.1	12.28%
Tannery	24,964	0.63%	-0.5%	73.1	2.40%
Ceramics	24,930	0.63%	0.2%	44.4	1.46%
Travel & Leisure	20,755	0.52%	2.0%	7.6	0.25%
Services & Real Estate	17,487	0.44%	2.8%	127.3	4.18%
IT	12,158	0.31%	-0.2%	62.7	2.06%
Jute	3,824	0.10%	-0.2%	5.7	0.19%
Paper & Printing	2,341	0.06%	0.6%	4.8	0.16%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
NATLIFEINS	240.60	8.57%	188.25	0.79	-
UPGDCL	352.60	2.56%	182.98	0.52	20.53
EHL	54.70	9.84%	123.36	2.31	14.39
ECABLES	391.50	3.57%	72.54	0.19	n/a
NEWLINE	22.10	-4.33%	68.72	3.04	11.28

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
EHL	54.70	9.84%	123.36	2.31	14.39
MEGCONMILK	20.20	9.78%	0.22	0.01	n/a
1STPRIMFMF	10.20	9.68%	12.24	1.21	10.63
NATLIFEINS	240.60	8.57%	188.25	0.79	-
PRAGATILIF	130.60	8.20%	15.62	0.12	-

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
NLI1STMF	12.00	-4.76%	0.01	0.00	9.38
EMERALDOIL	17.10	-4.47%	1.11	0.06	142.50
NEWLINE	22.10	-4.33%	68.72	3.04	11.28
SONARBAINS	46.30	-4.14%	30.71	0.65	23.62
GREENDELTA	60.20	-3.99%	0.02	0.00	18.13

IPDC

IPDC: Record Date and Subscription Period for Right Issuance Referring to their earlier news disseminated on 30.05.2019 with regard to BSEC Approval for issuance of Right Shares the Company has further informed that Record Date for the right issuance will be on June 25, 2019. Subscription will open on July 10, 2019 and close on July 31, 2019.

ANWARGALV

ANWARGALV: Brake Drum production discontinued till further notification
The Company has informed that considering the marketing expenses and profitability of GI fittings and Brake Drum products, the production activities of Brake Drum will remain closed until the next announcement. Production place and management of Brake Drum will be used for the production of GI fittings due to increase of comparative profitability.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
MERCANBANK	16.0	16.0	1	2,000,000	32.0
NCCBANK	16.5	16.5	3	2,461,000	40.6
PROVATIINS	29.5	29.5	1	17,000	0.5
SKTRIMS	51.0	51.0	1	10,000	0.5
SQRPHARMA	253.0	253.0	1	40,000	10.1
UTTARAFIN	56.5	56.5	1	10,000	0.6

Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
KAY&QUE	Engineering			Compulsory Spot	
AZIZPIPES	Engineering			Compulsory Spot	
RUPALIBANK	Bank	17-Jun-19			
PHOENIXFIN	NBFI	20-Jun-19			
SOUTHEASTB	Bank	23-Jun-19			
REPUBLIC	G. Insurance	27-Jun-19			
CENTRALINS	G. Insurance	29-Jun-19			
RUPALIINS	G. Insurance	3-Jul-19			
IFIC	Bank	4-Jul-19			
DHAKAINS	G. Insurance	27-Jun-19			
ICBIBANK	Bank	11-Jul-19			
ISLAMIINS	G. Insurance	27-Jul-19			
EASTERNINS	G. Insurance	30-Jul-19			
ABBANK	Bank	26-Jun-19			
UNIONCAP	NBFI	20-Jun-19			
MERCANBANK	Bank	20-Jun-19			
MARICO	Pharma	24-Jul-19			
SHAHJABANK	Bank	25-Jul-19			
NCCBANK	Bank	30-Jul-19			
MTB	Bank	30-Jun-19	3-Jun-19		
FASFIN	NBFI	27-Jun-19	12-Jun-19		
POPULARLIF	L. Insurance	15-Jul-19	12-Jun-19		
BAYLEASING	NBFI	30-Jun-19	13-Jun-19		
PURABIGEN	G. Insurance	18-Jul-19	16-Jun-19		
ONEBANKLTD	Bank	1-Aug-19	16-Jun-19		
NBL	Bank	20-Aug-19	16-Jun-19		
PEOPLESINS	G. Insurance	1-Aug-19	18-Jun-19		
SONARBAINS	G. Insurance	2-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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Expected absolute returns are calculated as the percentage of difference between our target price and latest close price. Stock recommendations are based on absolute upside (downside) and have a 12-month horizon. Please note that future price fluctuations could lead to a temporary mismatch between upside/downside for a stock and our recommendation.

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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