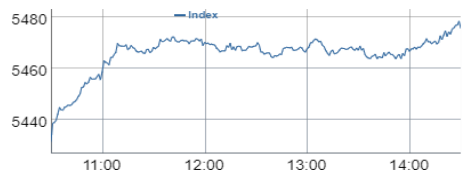


MARKET UP 44.39 POINTS

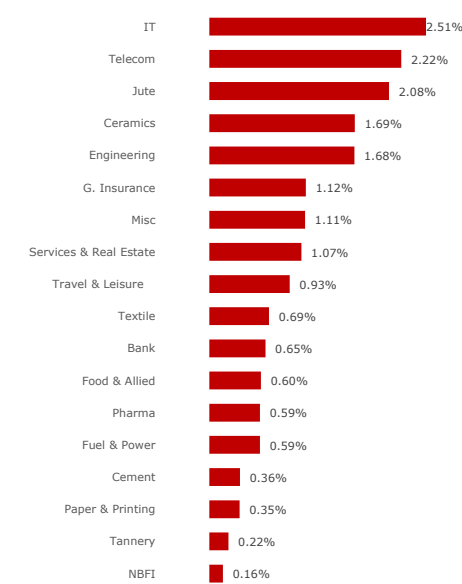
Market continued the gaining momentum for another session. Market started the session with a positive vibe and maintained the momentum till the end. Turnover stood at BDT 5.79bn, highest in last three months.

All the major sectors posted positive return today. IT, Telecom, Engineering sector advanced the most pushed by budget centric hopes. Government is considering to extend the tax exemption benefit on income from investment in infrastructure and industries in lagging regions for five more years to June 2024. Furthermore, the government is planning to legalize black money by allowing it to be invested in industries despite opposition from some related parties. Apparently, capital market investors are considering these developments very positively which is demonstrated by their bullish attitude.

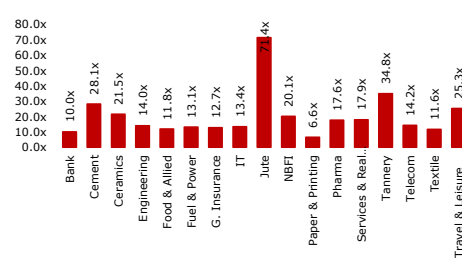
Intraday Performance of DSEX



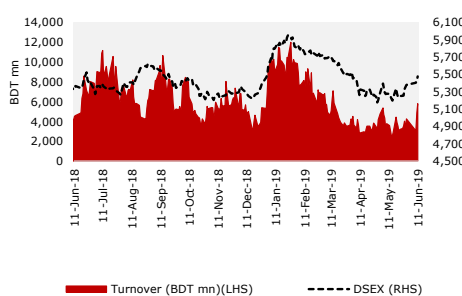
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,475.98	44.39	0.82%	5,385.64	1.68%
DS30	1,921.83	20.16	1.06%	1,880.78	2.18%
DSES	1,244.54	12.52	1.02%	1,232.82	0.95%
Dow Jones IA	26,062.68	78.74	0.30%	22,878.45	13.92%
Nikkei 225	21,204.28	69.86	0.33%	20,077.62	5.61%
FTSE 100	7,409.38	33.84	0.46%	6,617.38	11.97%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	5,787	4,849	937.92	19.34%	3,923
Turnover (USD mn)	68.89	57.73	11.17	19.34%	47
Volume (mn)	149	131	17.38	13.25%	99
Market Cap (BDT bn)	4,022	3,991	31.39	0.79%	
Market Cap (USD bn)	48	48	0.37	0.79%	
Market P/E (x)	13.77				
Particulars	Galner	Loser	Unchanged		
Market Breadth	224	75	53		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	565,414	14.06%	0.7%	485.3	8.39%
Telecom	514,926	12.80%	2.2%	97.7	1.69%
Pharma	476,222	11.84%	0.6%	734.4	12.69%
Fuel & Power	475,503	11.82%	0.6%	653.6	11.29%
Food & Allied	320,048	7.96%	0.6%	177.0	3.06%
NBFI	185,461	4.61%	0.2%	278.3	4.81%
Engineering	154,536	3.84%	1.7%	748.7	12.94%
Misc	109,751	2.73%	1.1%	360.9	6.24%
Textile	91,858	2.28%	0.7%	544.3	9.41%
Cement	90,977	2.26%	0.4%	54.6	0.94%
G. Insurance	48,792	1.21%	1.1%	470.8	8.14%
Ceramics	25,375	0.63%	1.7%	103.9	1.80%
Tannery	25,317	0.63%	0.2%	143.3	2.48%
Travel & Leisure	21,121	0.53%	0.9%	51.5	0.89%
Services & Real Estate	17,691	0.44%	1.1%	108.9	1.88%
IT	12,665	0.31%	2.5%	139.8	2.42%
Jute	3,902	0.10%	2.1%	16.7	0.29%
Paper & Printing	2,341	0.06%	0.4%	19.9	0.34%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
UPGDCL	371.60	2.03%	295.95	0.80	21.64
JMISMDL	414.80	7.57%	205.56	0.50	63.36
BBSCABLES	100.90	3.38%	144.55	1.45	9.44
SQRPHARMA	257.70	0.59%	141.92	0.55	16.20
KPCL	59.60	-1.81%	125.59	2.10	14.47

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
QUASEMIND	39.80	9.94%	18.34	0.46	50.59
GLOBALINS	25.00	9.65%	71.76	2.90	11.36
ZELBANGLA	39.20	9.50%	0.19	0.00	n/a
SONALIANS	453.50	8.73%	14.52	0.03	419.91
SEMLFBSLGF	12.00	8.11%	0.14	0.01	300.00

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
VAMLBDMF1	7.40	-6.33%	0.04	0.01	15.42
IMAMBUTTON	28.10	-5.07%	1.16	0.04	n/a
HWAWELLTEX	37.30	-4.36%	0.28	0.01	13.92
DACCADYE	4.40	-4.35%	0.13	0.03	n/a
MIDASFIN	21.00	-3.67%	10.67	0.50	16.94

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AFCAGRO	31.0	31.0	1	18,900	0.6
BATBC	1,420.0	1,420.0	2	70,000	99.4
BRACBANK	65.0	64.0	3	3,126,986	203.0
GP	361.2	361.2	1	160,000	57.8
IPDC	35.8	35.8	1	14,000	0.5
JMISMDL	390.0	390.0	1	2,500	1.0
MIDASFIN	21.0	21.0	1	227,700	4.8
UPGDCL	333.0	333.0	1	25,000	8.3

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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Recommendation Type	Holding period (If not otherwise mentioned)	Absolute Return Potential
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Neutral/ Hold	12 Months	Between +15 % and -5 %
Underweight	12 Months	Less than -5 %

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