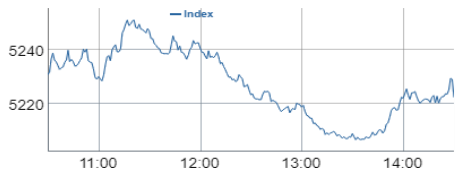


MARKET DOWN 8.33 POINTS

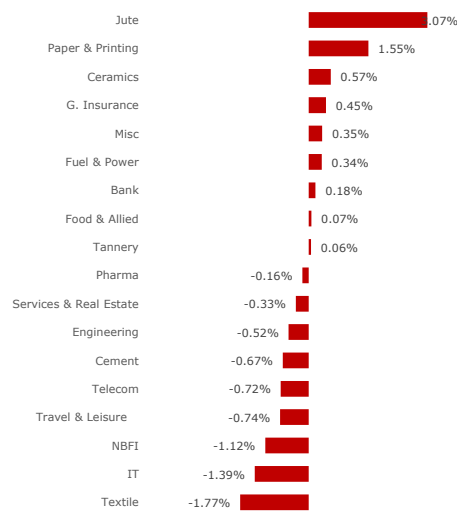
Market passed another monotonous session as major sectors - NBFI, Telecom, and bank - failed to perform. DSEX lost 8.33 points and closed at 5,222.30. News that some 15 banks and non-bank financial institutions have BDT 8.5bn stuck with people's Leasing Financial Services added more fuel to the fire. Turnover decreased by 14.1% to BDT 3.5bn as investors remained cautious and followed defensive stance.

Among major sectors, NBFI, IT, Textile, and telecom faced correction. NATLIFEINS, FEDERALINS, and GP topped the turnover chart. Investors' activities were mostly concentrated on General Insurance, Engineering and Pharmaceuticals sectors.

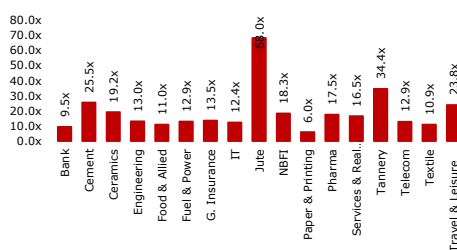
Intraday Performance of DSEX



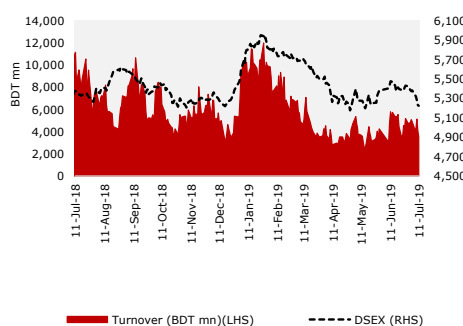
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,222.30	(8.33)	-0.16%	5,385.64	-3.03%
DS30	1,857.71	(3.19)	-0.17%	1,880.78	-1.23%
DSES	1,194.60	(3.66)	-0.31%	1,232.82	-3.10%
Dow Jones IA	26,860.20	76.71	0.29%	22,878.45	17.40%
Nikkei 225	21,643.53	110.05	0.51%	20,077.62	7.80%
FTSE 100	7,549.56	18.87	0.25%	6,617.38	14.09%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	3,511	4,089	(577.99)	-14.14%	3,993
Turnover (USD mn)	41.80	48.68	(6.88)	-14.14%	48
Volume (mn)	136	157	(20.89)	-13.28%	119
Market Cap (BDT bn)	3,866	3,873	(6.67)	-0.17%	
Market Cap (USD bn)	46	46	(0.08)	-0.17%	
Market P/E (x)	13.06				
Particulars	Gain	Loser	Unchanged		
Market Breadth	108	219	26		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	534,864	13.83%	0.2%	239.9	6.83%
Pharma	475,641	12.30%	-0.2%	274.4	7.82%
Fuel & Power	467,330	12.09%	0.3%	178.9	5.10%
Telecom	467,070	12.08%	-0.7%	118.2	3.37%
Food & Allied	297,070	7.68%	0.1%	111.4	3.17%
NBFI	166,802	4.31%	-1.1%	75.9	2.16%
Engineering	143,856	3.72%	-0.5%	388.4	11.06%
Misc	104,973	2.72%	0.4%	143.1	4.08%
Textile	86,526	2.24%	-1.8%	367.9	10.48%
Cement	82,617	2.14%	-0.7%	21.5	0.61%
G. Insurance	52,054	1.35%	0.4%	614.4	17.50%
Tannery	25,004	0.65%	0.1%	70.0	1.99%
Ceramics	22,695	0.59%	0.6%	89.7	2.55%
Travel & Leisure	19,921	0.52%	-0.7%	19.2	0.55%
Services & Real Estate	16,335	0.42%	-0.3%	27.1	0.77%
IT	11,726	0.30%	-1.4%	53.7	1.53%
Jute	3,720	0.10%	3.1%	12.3	0.35%
Paper & Printing	2,126	0.05%	1.5%	13.5	0.38%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
NATLIFEINS	260.40	5.04%	188.95	0.75	-
FEDERALINS	15.40	9.22%	106.50	7.11	25.67
GP	331.60	-0.75%	88.01	0.27	12.54
RUPALIINS	24.40	-2.79%	77.22	3.10	13.26
MONNOCERA	175.50	9.35%	74.82	0.44	20.41

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SEMLFBSLGF	17.60	10.00%	0.08	0.00	440.00
SEMLLECMF	9.00	9.76%	22.18	2.51	8.33
MONNOCERA	175.50	9.35%	74.82	0.44	20.41
FEDERALINS	15.40	9.22%	106.50	7.11	25.67
1STPRIMFMF	19.20	9.09%	30.71	1.64	20.00

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
UNITEDAIR	1.80	-10.00%	11.01	6.09	n/a
JUTESPINN	81.80	-9.91%	0.44	0.01	n/a
BXSYNTH	4.80	-9.43%	1.87	0.39	n/a
SHASHADNIM	39.60	-9.38%	36.27	0.90	7.90
SHYAMPSUG	22.40	-9.31%	0.42	0.02	n/a

ASIAPACINS

ASIAPACINS: Credit Rating Result

Alpha Credit Rating Limited (AlphaRating) has rated the Company as "AA" in the long term and "ST-1" in the short term along with a stable outlook based on audited financial statements of the Company as on December 31, 2018 and other relevant qualitative information till July 10, 2019.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BANGAS	331.0	331.0	1	1,650	0.5
BANKASIA	17.5	17.5	1	103,835	1.8
BXPHERMA	81.7	81.7	1	362,250	29.6
DBH	123.1	123.1	1	153,682	18.9
FEDERALINS	14.2	14.2	1	60,000	0.9
ISLAMIBANK	25.2	25.2	1	1,300,000	32.8
NLI1STMF	14.6	14.6	1	100,000	1.5
PTL	62.4	62.4	1	10,000	0.6
REGENTEX	16.5	16.5	1	50,000	0.8
RUNNERAUTO	110.0	110.0	1	14,000	1.5
SKTRIMS	49.1	49.1	3	284,226	14.0

Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
KAY&QUE	Engineering			Compulsory Spot	
AZIZPIPES	Engineering			Compulsory Spot	
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			
FIRSTFIN	NBFI		23-Jul-19	10-Jul-19	22-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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