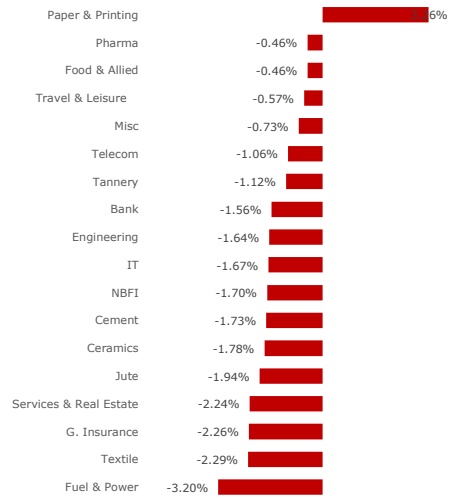
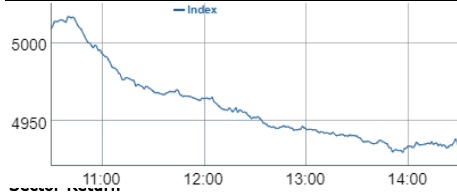


MARKET DOWN 75.79 POINTS

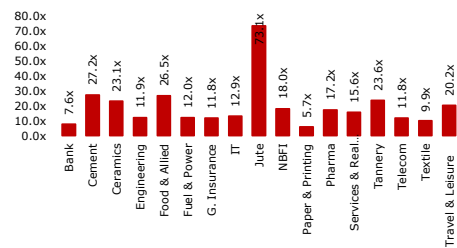
Market continued its bearish trend as majority of the scrips faced sell pressure. DSEX has lost a massive 75.8 points in today's session with an increased turnover compared to the last trading session (turnover BDT 5.02bn).

Apart from Paper & Printing, all the other sectors faced correction today and among them Fuel & Power took the biggest hit with a 3.2% decrease. Other major corrected sectors were General Insurance and Textile (both sector dropped 2.3%). One of the bigger market cap company UPGDCL's value dropped by 4.6% while GP also fell 0.9% as the tension between GP and BTRC has taken a new turn with GP announcing its legal battle against BTRC over the alleged audit claim.

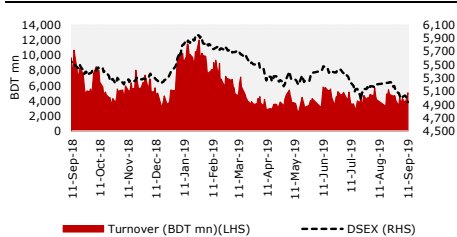
Intraday Performance of DSEX



Sector P/E



52 Week Daily Turnover & DSEX



Index

| Particulars | Value | Δ Points | Daily Δ % | Dec'18 Value | YTD Δ % |
|--------------|-----------|----------|-----------|--------------|---------|
| DSEX | 4,933.18 | (75.79) | -1.51% | 5,385.64 | -8.40% |
| DS30 | 1,736.19 | (21.93) | -1.25% | 1,880.78 | -7.69% |
| DSES | 1,155.49 | (14.02) | -1.20% | 1,232.82 | -6.27% |
| Dow Jones IA | 26,909.43 | 73.92 | 0.28% | 22,878.45 | 17.62% |
| Nikkei 225 | 21,597.76 | 205.66 | 0.96% | 20,077.62 | 7.57% |
| FTSE 100 | 7,326.44 | 58.49 | 0.80% | 6,617.38 | 10.72% |

Market Statistics

| Particulars | Today | Last Day | Daily Δ | Daily Δ % | 60 Day MA |
|---------------------|-------|----------|---------|-----------|-----------|
| Turnover (BDT mn) | 5,024 | 4,070 | 953.89 | 23.43% | 4,410 |
| Turnover (USD mn) | 59.81 | 48.46 | 11.36 | 23.43% | 52 |
| Volume (mn) | 128 | 96 | 32.53 | 33.94% | 135 |
| Market Cap (BDT bn) | 3,697 | 3,747 | (50.28) | -1.34% | |
| Market Cap (USD bn) | 44 | 45 | (0.60) | -1.34% | |
| Market P/E (x) | 12.73 | | | | |

| Particulars | Gain | Loser | Unchanged |
|----------------|------|-------|-----------|
| Market Breadth | 37 | 288 | 28 |

Sector Statistics

| Sector | Market Cap (BDTmn) | % of total Market Cap | Sector Return | Turnover (BDTmn) | % of total Turnover |
|------------------------|--------------------|-----------------------|---------------|------------------|---------------------|
| Bank | 497,244 | 13.45% | -1.6% | 257.7 | 5.13% |
| Pharma | 492,360 | 13.32% | -0.5% | 1,166.7 | 23.22% |
| Telecom | 430,677 | 11.65% | -1.1% | 79.4 | 1.58% |
| Fuel & Power | 430,385 | 11.64% | -3.2% | 363.8 | 7.24% |
| Food & Allied | 264,523 | 7.16% | -0.5% | 329.8 | 6.56% |
| NBFI | 148,116 | 4.01% | -1.7% | 183.7 | 3.66% |
| Engineering | 135,705 | 3.67% | -1.6% | 803.0 | 15.98% |
| Misc | 111,770 | 3.02% | -0.7% | 191.5 | 3.81% |
| Cement | 78,948 | 2.14% | -1.7% | 17.2 | 0.34% |
| Textile | 78,536 | 2.12% | -2.3% | 485.3 | 9.66% |
| G. Insurance | 45,256 | 1.22% | -2.3% | 249.1 | 4.96% |
| Tannery | 24,163 | 0.65% | -1.1% | 94.0 | 1.87% |
| Ceramics | 24,125 | 0.65% | -1.8% | 182.1 | 3.62% |
| Travel & Leisure | 18,795 | 0.51% | -0.6% | 26.8 | 0.53% |
| Services & Real Estate | 15,433 | 0.42% | -2.2% | 22.7 | 0.45% |
| IT | 12,281 | 0.33% | -1.7% | 109.6 | 2.18% |
| Jute | 3,997 | 0.11% | -1.9% | 68.8 | 1.37% |
| Paper & Printing | 2,051 | 0.06% | 3.3% | 17.4 | 0.35% |

Top Turnover

| Ticker | Close Price (BDT) | Daily Δ % | Turnover (BDTmn) | Volume (mn) | P/E (x) |
|------------|-------------------|-----------|------------------|-------------|---------|
| NLTUBES | 152.70 | 9.94% | 268.82 | 1.83 | n/a |
| JMISMDL | 517.70 | 5.14% | 248.88 | 0.49 | 79.08 |
| BEACONPHAR | 29.00 | 5.07% | 234.65 | 8.18 | 38.84 |
| MONNOCERA | 216.60 | -0.41% | 139.72 | 0.64 | 25.19 |
| STYLECRAFT | 919.70 | 2.71% | 131.46 | 0.14 | 116.32 |

Top Gainers

| Ticker | Close Price (BDT) | Daily Δ % | Turnover (BDTmn) | Volume (mn) | P/E (x) |
|-----------|-------------------|-----------|------------------|-------------|---------|
| NLTUBES | 152.70 | 9.94% | 268.82 | 1.83 | n/a |
| KPPL | 13.70 | 9.60% | 1.56 | 0.12 | n/a |
| STANCERAM | 428.50 | 8.73% | 36.27 | 0.09 | 211.43 |
| GEMINISEA | 310.30 | 8.72% | 51.13 | 0.17 | 347.35 |
| MONNOSTAF | 2032.50 | 5.46% | 131.36 | 0.07 | 267.43 |

Top Losers

| Ticker | Close Price (BDT) | Daily Δ % | Turnover (BDTmn) | Volume (mn) | P/E (x) |
|------------|-------------------|-----------|------------------|-------------|---------|
| MLDYIEING | 22.70 | -9.56% | 4.56 | 0.20 | 17.03 |
| VFSTDL | 25.80 | -9.15% | 112.94 | 4.34 | 10.69 |
| POPULARLIF | 84.10 | -8.39% | 0.25 | 0.00 | - |
| SEMLIBLSF | 9.90 | -8.33% | 8.08 | 0.78 | 17.37 |
| GLOBALINS | 18.90 | -8.25% | 25.25 | 1.31 | 16.58 |

Daily Market Review

Market faced major sell-off
11-Sep-2019

Block Trade

| Ticker | Max Price (BDT) | Min Price (BDT) | No. of Trades | Volume | Value (BDTmn) |
|------------|-----------------|-----------------|---------------|-----------|---------------|
| AL-HAJTEX | 72.0 | 72.0 | 1 | 7,000 | 0.5 |
| ANWARGALV | 88.0 | 86.0 | 2 | 11,900 | 1.0 |
| BANGAS | 310.0 | 310.0 | 1 | 2,500 | 0.8 |
| BANKASIA | 17.0 | 17.0 | 1 | 860,000 | 14.6 |
| BEACONPHAR | 28.5 | 28.5 | 2 | 497,000 | 14.2 |
| CITYBANK | 25.3 | 25.3 | 2 | 3,000,000 | 75.9 |
| IBBLPBOND | 914.5 | 914.5 | 1 | 1,463 | 1.3 |
| JAMUNABANK | 15.4 | 15.4 | 5 | 3,538,000 | 54.5 |
| LANKABAFIN | 17.8 | 17.8 | 1 | 100,000 | 1.8 |
| NLTUBES | 146.0 | 142.0 | 2 | 8,500 | 1.2 |
| PHARMAID | 603.0 | 603.0 | 1 | 850 | 0.5 |
| SINOBANGLA | 71.4 | 71.4 | 2 | 35,000 | 2.5 |
| SQRPHARMA | 247.0 | 247.0 | 1 | 7,480 | 1.8 |
| UTTARABANK | 26.1 | 26.1 | 1 | 1,100,000 | 28.7 |
| WATACHEM | 665.0 | 665.0 | 1 | 1,000 | 0.7 |

Upcoming Record Date, AGM and Spot

| Ticker | Sector | AGM | Record Date | Spot Start | Spot Finish |
|-----------|--------------|-----------|-------------|-----------------|-------------|
| KAY&QUE | Engineering | | | Compulsory Spot | |
| AZIZPIPES | Engineering | | | Compulsory Spot | |
| RSRMSTEEL | Engineering | | 18-Sep-19 | | |
| NPOLYMAR | Engineering | 15-Oct-19 | 22-Sep-19 | | |
| DOREENPWR | Fuel & Power | 12-Dec-19 | 13-Oct-19 | | |
| PADMALIFE | L. Insurance | | 13-Oct-19 | | |
| KDSALTD | Engineering | 7-Nov-19 | 1-Oct-19 | | |
| IFIC | Bank | | 16-Sep-19 | 12-Sep-19 | 15-Sep-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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