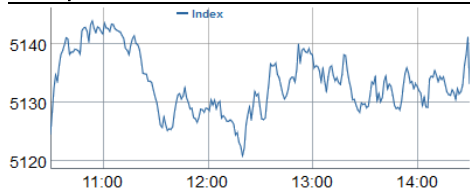


MARKET UP 8.69 POINTS

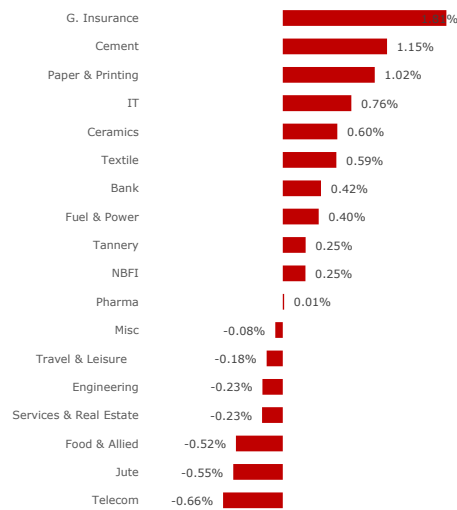
Market closed flat exhibiting volatility throughout the session. Broad index, DSEX, closed at 5,133 gaining 8.69 points. Trading activity was sluggish as investors maintained cautious stance. Bangladesh Telecommunication Regulatory Commission (BTRC) is set to lift the partial block on the bandwidth capacity of GP after government stepped in to give relief to the millions of internet users of the operator. Despite this positive development, GP lost 0.67% market cap today as investors remain uncertain about the regulator's future move.

Among major sectors, General Insurance, Cement and Bank posted positive return while Telecom and Food & Allied faced correction. FORTUNE and UPGDCL dominated the turnover chart.

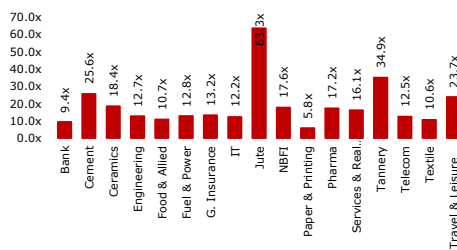
Intraday Performance of DSEX



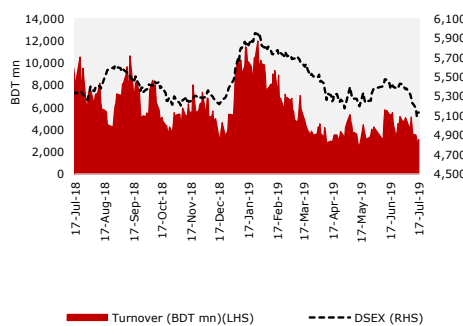
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,133.14	8.69	0.17%	5,385.64	-4.69%
DS30	1,830.03	0.54	0.03%	1,880.78	-2.70%
DSES	1,176.89	1.59	0.14%	1,232.82	-4.54%
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)	3,096	2,718	378.40	13.92%	3,976
Turnover (USD mn)	36.86	32.35	4.50	13.92%	47
Volume (mn)	127	96	30.33	31.50%	122
Market Cap (BDT bn)	3,818	3,812	5.53	0.15%	
Market Cap (USD bn)	45	45	0.07	0.15%	
Market P/E (x)	12.83				
Particulars	Gainer	Loser	Unchanged		
Market Breadth	196	118	38		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	529,555	13.87%	0.4%	170.0	5.49%
Pharma	469,698	12.30%	0.0%	305.0	9.85%
Fuel & Power	462,260	12.11%	0.4%	249.5	8.06%
Telecom	458,140	12.00%	-0.7%	97.4	3.14%
Food & Allied	290,899	7.62%	-0.5%	92.3	2.98%
NBFI	161,154	4.22%	0.3%	73.4	2.37%
Engineering	139,840	3.66%	-0.2%	306.9	9.91%
Misc	104,373	2.73%	-0.1%	188.5	6.09%
Textile	84,056	2.20%	0.6%	255.3	8.25%
Cement	82,699	2.17%	1.2%	33.4	1.08%
G. Insurance	50,793	1.33%	1.8%	467.3	15.09%
Tannery	25,367	0.66%	0.3%	248.7	8.03%
Ceramics	21,761	0.57%	0.6%	43.0	1.39%
Travel & Leisure	19,803	0.52%	-0.2%	6.0	0.19%
Services & Real Estate	15,864	0.42%	-0.2%	17.8	0.58%
IT	11,593	0.30%	0.8%	48.9	1.58%
Jute	3,463	0.09%	-0.6%	5.3	0.17%
Paper & Printing	2,074	0.05%	1.0%	12.1	0.39%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FORTUNE	38.50	2.67%	231.97	6.04	17.29
UPGDCL	378.40	1.50%	94.01	0.25	22.03
SILCOPHL	27.20	9.24%	80.00	2.99	16.72
GP	326.00	-0.61%	74.55	0.23	12.19
GLOBALINS	26.80	5.51%	74.34	2.78	12.18

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
EASTERNINS	44.40	9.90%	30.71	0.70	14.05
SONARBAINS	32.20	9.90%	15.07	0.48	16.43
VAMLRBBF	9.10	9.64%	1.20	0.13	n/a
BEACHHATCH	14.80	9.63%	1.58	0.11	n/a
SEMLIBLSF	9.30	9.41%	8.02	0.87	9.96

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BIFC	3.20	-8.57%	0.11	0.04	n/a
FIRSTFIN	4.20	-6.67%	0.86	0.20	n/a
UNITEDAIR	1.80	-5.26%	0.71	0.39	n/a
FAREASTFIN	3.80	-5.00%	0.66	0.17	n/a
BXSYNTH	4.60	-4.17%	0.44	0.09	n/a

BANKASIA

BANKASIA: Consent from BSEC for Issuance of Non-Convertible Subordinated Bond

With reference to their earlier news disseminated by DSE on 18.10.2018 regarding Issuing of 7 years Non-Convertible Subordinated Bond, the Company has further informed that BSEC vide its letter dated July 16, 2019 has given consent for raising of capital of the company through issuance of Floating Rate Non-Convertible Subordinated Bond of Tk. 500.00 crore only divided into 500 bond of Tk. 10,000,000.00 each through private placement to other than existing shareholders of the Company subject to NOC from Bangladesh Bank. Purpose of the proposed bond is to strengthen the capital base of the Company.

PRIMELIFE

PRIMELIFE: Q2 Financials

Decrease in life revenue account for Apr-June 2019 was Tk. 84.24 mn with total life insurance fund of Tk. 8,273.77 mn as against decrease in Tk. 3.57 mn and Tk. 8,057.65 mn respectively for the same period of the previous year. Decrease in life revenue account for Jan-June 2019 was Tk.536.12 mn with total life insurance fund of Tk. 8,273.76 mn as against decrease in Tk. 408.94 mn and Tk. 8,057.65 mn respectively for the same period of the previous year.

EHL

EHL: Decision to purchase floor space

The Company has informed that the Board of Directors of the Company has decided to purchase a floor space measuring 6687.88 sq. ft. at 59/B, Kemal Ataturk Avenue, Banani, Dhaka 1213 at a cost of Tk. 22,76,55,000.00 only excluding registration and other related expenses.

SHASHADNIM

SHASHADNIM: Credit Rating Result

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the surveillance rating of the Company as "AA3" in the long term and "ST-2" in the short term along with a stable outlook based on audited financial statements of the Company up to June 30, 2018, Bank liability position as on June 25, 2019 and other relevant quantitative as well as qualitative information up to the date of rating declaration.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
FORTUNE	38.2	37.7	3	400,000	15.1
GP	326.4	326.4	1	129,074	42.1
IBP	24.1	24.1	1	72,000	1.7
PTL	60.5	60.5	1	20,000	1.2
RUPALIINS	22.2	22.2	1	200,000	4.4
SILCOPHL	26.5	26.5	1	20,000	0.5
UNITEDINS	58.7	58.7	1	50,000	2.9
UPGDCL	350.0	350.0	1	2,000	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	
PRAGATILIF	L. Insurance	25-Aug-19	28-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	25-Jul-19	23-Jul-19	10-Jul-19	22-Jul-19
GP	Telecom		4-Aug-19	31-Jul-19	1-Aug-19
PRIMELIFE	L. Insurance	26-Sep-19	21-Jul-19	17-Jul-19	18-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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