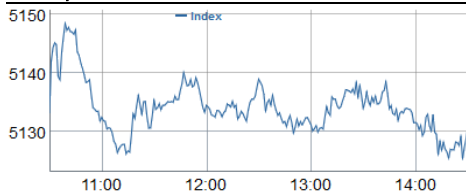


MARKET DOWN 2.44 POINTS

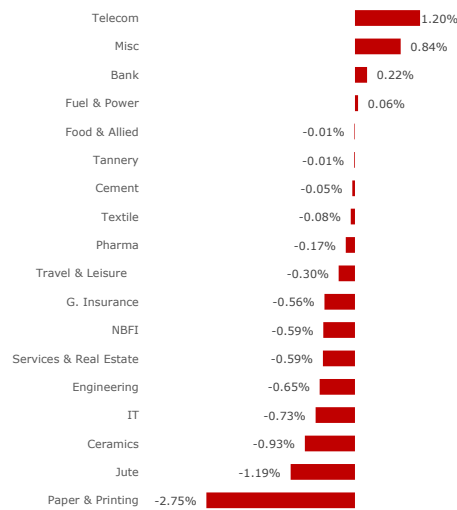
Market started the session with positive vibe but closed flat passing another volatile session. Broad index, DSEX, closed at 5,131 losing 2.44 points. Turnover increased by a staggering 28% and stood at BDT 3.95bn. The consolidated EPS of BERGERPBL rose 50% in Q2'2019 on a year-over-year basis. Following this news, BERGERPBL gained 2.6% today closing at BDT 1,434.5. In another news, Bangladesh has moved to import one fourth of its total LNG requirement from spot market to reap the benefits of a downtrend in global LNG prices.

Among major sectors, telecom, bank and fuel & power closed positive today while engineering faced correction. Pharma sector dominated the turnover chart today as BEACONPHAR was among the top traded shares.

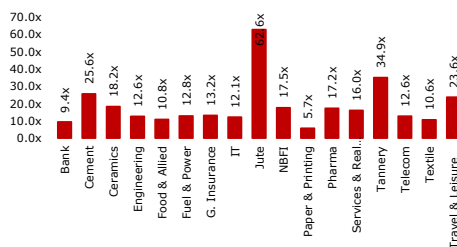
Intraday Performance of DSEX



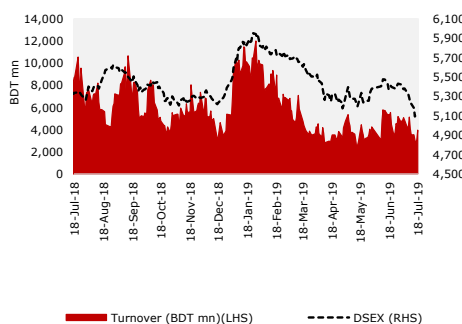
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,130.70	(2.44)	-0.05%	5,385.64	-4.73%
DS30	1,829.58	(0.45)	-0.02%	1,880.78	-2.72%
DSES	1,176.14	(0.74)	-0.06%	1,232.82	-4.60%
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)	3,953	3,096	856.95	27.68%	3,992
Turnover (USD mn)	47.06	36.86	10.20	27.68%	48
Volume (mn)	142	127	15.48	12.23%	123
Market Cap (BDT bn)	3,823	3,818	5.17	0.14%	
Market Cap (USD bn)	46	45	0.06	0.14%	
Market P/E (x)	12.85				
Particulars	Gain	Loser	Unchanged		
Market Breadth	111	204	38		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	530,735	13.88%	0.2%	168.8	4.27%
Pharma	468,902	12.27%	-0.2%	606.9	15.35%
Telecom	463,649	12.13%	1.2%	69.4	1.76%
Fuel & Power	462,523	12.10%	0.1%	211.0	5.34%
Food & Allied	290,871	7.61%	0.0%	85.9	2.17%
NBFI	160,209	4.19%	-0.6%	94.4	2.39%
Engineering	138,928	3.63%	-0.7%	416.0	10.52%
Misc	105,255	2.75%	0.8%	212.3	5.37%
Textile	83,989	2.20%	-0.1%	358.1	9.06%
Cement	82,658	2.16%	-0.1%	45.0	1.14%
G. Insurance	50,507	1.32%	-0.6%	559.8	14.16%
Tannery	25,363	0.66%	0.0%	414.0	10.47%
Ceramics	21,560	0.56%	-0.9%	52.9	1.34%
Travel & Leisure	19,744	0.52%	-0.3%	26.4	0.67%
Services & Real Estate	15,770	0.41%	-0.6%	19.1	0.48%
IT	11,508	0.30%	-0.7%	47.4	1.20%
Jute	3,421	0.09%	-1.2%	6.0	0.15%
Paper & Printing	2,017	0.05%	-2.7%	16.3	0.41%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FORTUNE	39.90	3.64%	388.45	9.77	17.92
BEACONPHAR	21.60	5.88%	265.14	12.38	28.93
SONARBAINS	30.10	-6.52%	139.14	4.46	15.36
NPOLYMAR	118.80	2.68%	102.32	0.86	28.47
FEDERALINS	15.70	3.97%	97.55	6.27	26.17

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SONARGAON	33.00	10.00%	2.21	0.07	28.13
PROGRESLIF	95.20	9.93%	3.62	0.04	-
VAMLRBBF	10.00	9.89%	10.01	1.00	n/a
SEMLFBSLGF	27.80	9.88%	0.64	0.02	695.00
SEMLIBLSF	10.20	9.68%	8.92	0.89	10.93

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BIFC	2.90	-9.38%	0.23	0.08	n/a
DELTASPINN	4.90	-9.26%	0.51	0.10	18.38
AL-HAJTEX	46.80	-8.95%	22.54	0.47	n/a
BXSYNTH	4.20	-8.70%	0.67	0.15	n/a
FAREASTFIN	3.50	-7.89%	0.44	0.12	n/a

PLFSL

PLFSL: Information regarding liquidation of the Company

The Company has informed that they have received a certificate of the Lawyer of Bangladesh Bank regarding liquidation of the Company. It was also informed that Bangladesh Bank appointed a Provisional Liquidator to take charge of the assets of the Company.

UTTARABANK

UTTARABANK: Credit Rating Result

Emerging Credit Rating Limited (ECRL) has assigned the surveillance rating of the Company as "AA" 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 December 31, 2018 and other relevant quantitative as well as qualitative information up to the date of rating.

RAKCERAMIC

RAKCERAMIC: Q2 Financials

Consolidated EPS was Tk. 0.37 for April-June 2019 as against Tk. 0.34 for April-June 2018; Consolidated EPS was Tk. 0.80 for January-June 2019 as against Tk. 0.90 for January-June 2018. Consolidated NOCFPS was Tk. 0.53 for January-June 2019 as against Tk. (0.22) for January-June 2018. Consolidated NAV per share was Tk. 16.20 as on June 30, 2019 and Tk. 16.68 as on June 30, 2018.

PURABIGEN

PURABIGEN: Q2 Financials

EPS was Tk. 0.30 for April-June 2019 as against Tk. 0.21 for April-June, 2018; EPS was Tk. 0.51 for January-June 2019 as against Tk. 0.50 for January-June, 2018. NOCFPS was Tk. 0.12 for January-June, 2019 as against Tk. 0.37 for January-June 2018. NAV per share was Tk. 13.58 as on June 30, 2019 and Tk. 12.50 as on June 30, 2018.

BERGERPBL

BERGERPBL: Q1 Financials

Consolidated EPS was Tk. 11.12 for April-June 2019 as against Tk. 7.39 for April-June 2018; Consolidated NOCFPS was Tk. 20.03 for April-June 2019 as against Tk. (3.38) for April-June 2018. Consolidated NAV per share was Tk. 187.31 as on June 30, 2019 and Tk. 176.18 as on March 31, 2019. The Company also informed that EPS for first quarter ended June 30, 2019 increased significantly from the same period of previous year as a result of decline in price of key raw materials and increase in net financial income. The NOCFPS increased significantly from same period of previous year mainly because of improvement in working capital management.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ASIAINS	25.6	25.6	1	20,500	0.5
FORTUNE	37.1	36.0	2	1,540,000	55.5
NEWLINE	25.3	25.3	1	35,400	0.9
PRIMEINSUR	25.0	25.0	1	24,500	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	
ILFSL	NBFI	22-Aug-19	23-Jul-19	21-Jul-19	22-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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