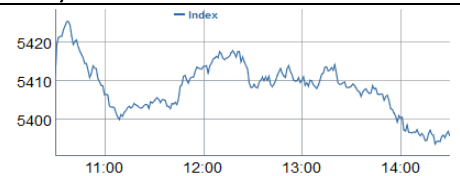


MARKET DOWN 15.78 POINTS

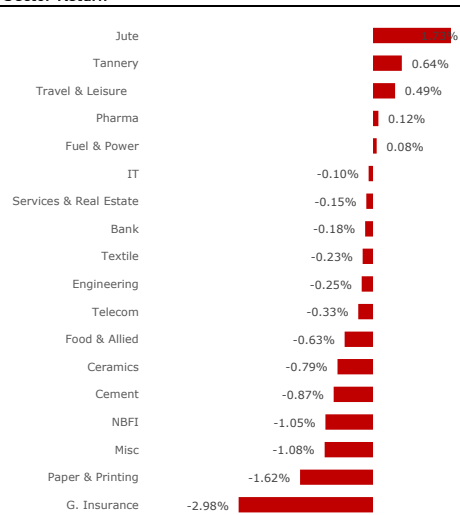
Market returned to negative territory as investors opted for profit taking after a brief surge in the market. Broad index, DSEX, lost 15.78 points fetching a turnover of BDT 4.46bn. Turnover declined by 19.56% compared to previous session. Government's proposal of charging tax on stock dividend and retained earnings in excess of 50% of paid up capital has created conundrum in the market. Investors are adopting "wait and see" approach which is shrinking the turnover in the market.

Among major sectors, Jute, Tannery and Pharmaceuticals posted positive return while General Insurance, NBF and Cement faced correction. UPGDCL, RUPALILIFE and NURANI topped the turnover chart. Investors' activities were mainly concentrated on Textile, General Insurance and Fuel & Power sectors.

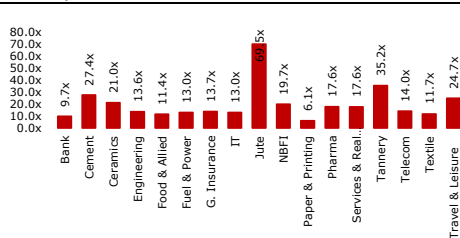
Intraday Performance of DSEX



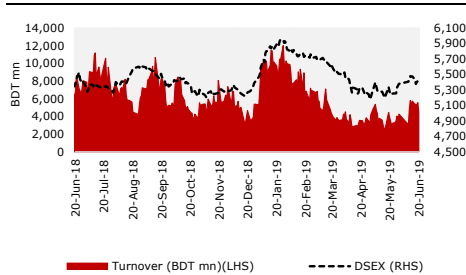
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,395.63	(15.78)	-0.29%	5,385.64	0.19%
DS30	1,894.39	(3.42)	-0.18%	1,880.78	0.72%
DSES	1,233.28	(1.80)	-0.15%	1,232.82	0.04%
Dow Jones IA	26,504.00	38.46	0.15%	22,878.45	15.85%
Nikkei 225	21,462.86	128.99	0.60%	20,077.62	6.90%
FTSE 100	7,427.17	23.63	0.32%	6,617.38	12.24%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,457	5,540	(1,083.73)	-19.56%	3,881
Turnover (USD mn)	53.06	65.96	(12.90)	-19.56%	46
Volume (mn)	134	162	(27.90)	-17.25%	103
Market Cap (BDT bn)	3,979	3,989	(10.71)	-0.27%	
Market Cap (USD bn)	47	47	(0.13)	-0.27%	
Market P/E (x)	13.56				
Particulars	Galner	Loser	Unchanged		
Market Breadth	85	222	44		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	548,527	13.79%	-0.2%	252.0	5.66%
Telecom	508,332	12.78%	-0.3%	102.5	2.30%
Pharma	480,499	12.08%	0.1%	386.9	8.68%
Fuel & Power	469,555	11.80%	0.1%	463.5	10.40%
Food & Allied	308,761	7.76%	-0.6%	173.7	3.90%
NBF	181,759	4.57%	-1.1%	153.8	3.45%
Engineering	149,559	3.76%	-0.3%	443.3	9.95%
Misc	108,945	2.74%	-1.1%	178.4	4.00%
Textile	92,625	2.33%	-0.2%	759.2	17.03%
Cement	88,593	2.23%	-0.9%	41.5	0.93%
G. Insurance	52,503	1.32%	-3.0%	529.4	11.88%
Tannery	25,561	0.64%	0.6%	116.9	2.62%
Ceramics	24,874	0.63%	-0.8%	91.0	2.04%
Travel & Leisure	20,637	0.52%	0.5%	11.1	0.25%
Services & Real Estate	17,329	0.44%	-0.1%	47.4	1.06%
IT	12,290	0.31%	-0.1%	111.6	2.50%
Jute	3,798	0.10%	1.7%	19.1	0.43%
Paper & Printing	2,194	0.06%	-1.6%	11.2	0.25%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
UPGDCL	373.20	0.76%	300.88	0.80	21.73
RUPALILIFE	67.10	1.21%	118.69	1.71	-
NURANI	17.00	0.00%	110.74	6.49	12.26
JMISMDL	437.60	-1.37%	105.95	0.24	66.84
EASTERNINS	56.00	-6.98%	92.45	1.62	17.72

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BEACHHATCH	16.80	9.80%	4.30	0.26	n/a
FIRSTFIN	7.10	7.58%	1.94	0.28	n/a
IMAMBUTTON	27.70	7.36%	0.31	0.01	n/a
SUNLIFEINS	32.20	7.33%	33.90	1.03	-
ALLTEX	12.20	5.17%	0.94	0.08	n/a

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SONARBAINS	46.10	-7.80%	44.49	0.95	23.52
EASTERNINS	56.00	-6.98%	92.45	1.62	17.72
RUPALIINS	20.80	-5.45%	11.08	0.52	11.30
PURABIGEN	17.60	-5.38%	23.32	1.29	20.95
PHENIXINS	30.30	-5.31%	2.01	0.06	13.53

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AMANFEED	44.2	44.2	2	500,000	22.1
BXPHARMA	78.3	78.3	2	50,000	3.9
EASTERNINS	60.2	60.2	13	1,015,000	61.1
JAMUNABANK	19.1	19.1	2	477,000	9.1
NATLIFEINS	248.0	248.0	1	2,760	0.7
OLYMPIC	231.2	231.1	2	18,371	4.2
PTL	64.2	64.2	1	55,000	3.5
RNSPIN	6.7	6.7	1	100,000	0.7
UCB	19.2	19.2	1	2,756,000	52.9
VFSTDL	55.0	52.0	7	826,000	44.2

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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Buy	12 Months	More than +15%
Neutral/ Hold	12 Months	Between +15 % and -5 %
Underweight	12 Months	Less than -5 %

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CONTACT US

Research Team

Rajib Kumar Das	Head of Research	rajib.das@ucb.com.bd	+ 880 1730 797 728
Anika Mafiz	Research Associate	anika.mafiz@ucb.com.bd	+ 880 1701 205 006
Md Zarif Ibne Arif	Research Associate	zarif.arif@ucb.com.bd	+ 880 1701 205 072
Md. Nazmus Sakib	Research Associate	nazmus.sakib@ucb.com.bd	+ 880 1701 205 073
Anik Mahmood Ibne Anwar	Research Associate	anik.mahmood@ucb.com.bd	+ 880 1701 205 074
Shadman Sadique Kamal	Research Associate	shadman.kamal@ucb.com.bd	+ 880 1701 205 096

Institutional and Foreign Trade Department

Sonchoy Saha, CFA	Head of Institutional Sales	sonchoy.kumer@ucb.com.bd	+ 880 1755 615 313
Tahmidur Rahman	Senior Executive Officer	tahmid@bloomberg.net	+ 880 1726 995 520
		rahman.tahmidur@ucb.com.bd	

Office Premises

Head Office	Corporate Office	DSE Extension Office	Chattogram Office
6, Dilkusha C/A, (1st Floor)	Bulus Center (Level- 2)	Room 633, 9/E DSE Annex	Ayub Trade Center
Dhaka -1000	Plot - CWS (A)-1, Road no- 34	Building (5th Floor)	1269/B SK Mujib Road (4th Floor)
Bangladesh	Gulshan Avenue, Dhaka -1212	Motijheel C/A, Dhaka 1000	Agrabad C/A, Chattogram

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