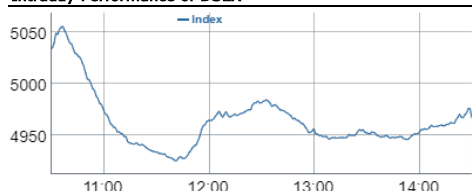


MARKET DOWN 67.31 POINTS

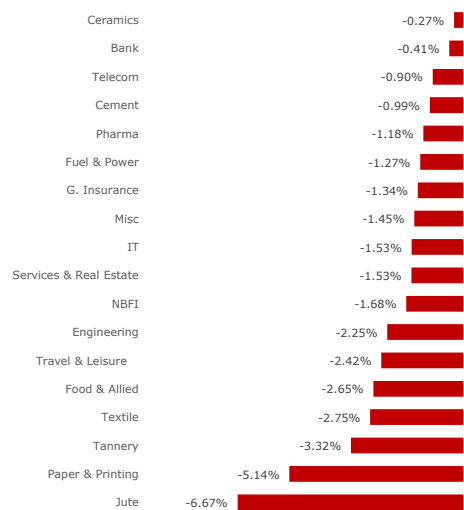
Market closed red extending the losing streak for three consecutive sessions. Broad index, DSEX, plunged sharply below 5,000 closing at a 31-months-low value of 4,966. It is the lowest level since December 22, 2016. Turnover increased by a whopping 28% and stood at BDT 4.64bn. This high level of trading activity amid deteriorating index proves that panic-driven investors continued to dump their holdings to avoid further losses. The government's move to liquidate People's Leasing and Financial Services Limited (PLFSL), Grameenphone issue coupled with fund shortage continued to take toll on the investor sentiment.

All major sectors closed negative today. FORTUNE, SQRPHARMA and UPGDCL dominated the turnover chart. Losers took a strong lead over the gainers as out of 353 issues traded, 60 advanced,

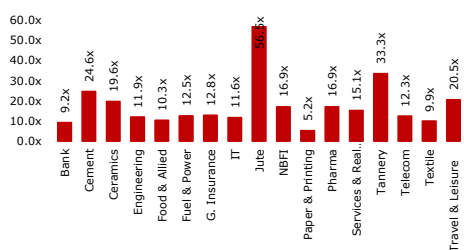
Intraday Performance of DSEX



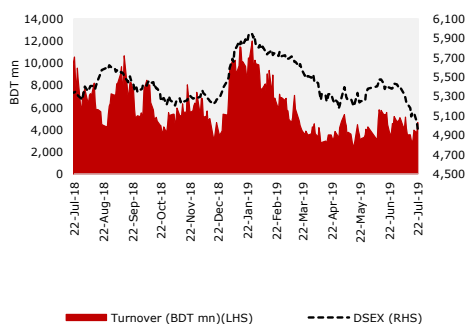
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	4,966.44	(67.31)	-1.34%	5,385.64	-7.78%
DS30	1,776.15	(23.27)	-1.29%	1,880.78	-5.56%
DSES	1,139.15	(18.34)	-1.58%	1,232.82	-7.60%
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)	4,642	3,686	955.43	25.92%	4,034
Turnover (USD mn)	55.26	43.89	11.37	25.92%	48
Volume (mn)	166	149	17.41	11.72%	126
Market Cap (BDT bn)	3,730	3,773	(43.59)	-1.16%	
Market Cap (USD bn)	44	45	(0.52)	-1.16%	
Market P/E (x)	12.48				

Particulars	Gain	Loser	Unchanged
Market Breadth	60	277	16

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	521,891	13.99%	-0.4%	280.8	6.05%
Pharma	460,028	12.33%	-1.2%	445.9	9.61%
Fuel & Power	452,833	12.14%	-1.3%	325.3	7.01%
Telecom	452,292	12.13%	-0.9%	94.9	2.05%
Food & Allied	278,940	7.48%	-2.7%	143.2	3.08%
NBFI	154,227	4.14%	-1.7%	124.3	2.68%
Engineering	131,074	3.51%	-2.2%	403.5	8.69%
Misc	101,544	2.72%	-1.4%	247.4	5.33%
Cement	79,451	2.13%	-1.0%	33.7	0.73%
Textile	78,489	2.10%	-2.8%	371.1	7.99%
G. Insurance	49,547	1.33%	-1.3%	498.1	10.73%
Tannery	24,216	0.65%	-3.3%	250.2	5.39%
Ceramics	20,483	0.55%	-0.3%	86.3	1.86%
Travel & Leisure	19,029	0.51%	-2.4%	104.1	2.24%
Services & Real Estate	14,939	0.40%	-1.5%	35.6	0.77%
IT	11,027	0.30%	-1.5%	52.4	1.13%
Jute	3,088	0.08%	-6.7%	8.7	0.19%
Paper & Printing	1,848	0.05%	-5.1%	13.8	0.30%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FORTUNE	37.80	-4.79%	209.40	5.44	16.98
SQRPHARMA	247.60	-2.33%	125.41	0.50	15.57
UPGDCL	375.10	-1.16%	105.07	0.28	21.84
FEDERALINS	15.50	-4.32%	94.62	5.95	25.83
SEAPEARL	36.50	-6.89%	88.00	2.29	44.88

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FIRSTFIN	4.40	10.00%	0.39	0.09	n/a
AL-HAJTEX	47.50	9.95%	15.68	0.34	n/a
SEMLFBSLGF	33.50	9.84%	0.03	0.00	837.50
SEMLIBLSLF	12.30	9.82%	3.17	0.26	13.18
PF1STMF	7.90	9.72%	21.52	2.80	14.11

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
EMERALDOIL	9.00	-10.00%	0.51	0.06	75.00
MEGCONMILK	13.80	-9.80%	0.43	0.03	n/a
CNATEX	1.90	-9.52%	1.51	0.79	2.64
JUTESPINN	68.10	-9.32%	0.01	0.00	n/a
IMAMBUTTON	18.50	-9.31%	0.20	0.01	n/a

UNIONCAP

UNIONCAP: Sale declaration of a Sponsor

Engr. M. Abu Taher, one of the Sponsors of the Company, has expressed his intention to sell 27,497 shares out of his total holding of 21,34,323 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

PRAGATIINS

PRAGATIINS: Q2 Financials

EPS was Tk. 0.63 for April-June 2019 as against Tk. 0.69 for April-June 2018; EPS was Tk. 1.52 for January-June 2019 as against Tk. 1.39 for January-June 2018. NOCFPS was Tk. 1.20 for January-June 2019 as against Tk. 1.18 for January-June 2018. NAV per share was Tk. 60.72 as on June 30, 2019 and Tk. 53.05 as on December 31, 2018.

SONARBAINS

SONARBAINS: Q2 Financials

Consolidated EPS was Tk. 0.39 for April-June 2019 as against Tk. 0.40 for April-June 2018; Consolidated EPS was Tk. 0.96 for January-June 2019 as against Tk. 0.92 for January-June 2018. Consolidated NOCFPS was Tk. 0.71 for January-June 2019 as against Tk. 0.43 for January-June 2018. Consolidated NAV per share was Tk. 18.69 as on June 30, 2019 and Tk. 17.73 as on June 30, 2018.

IPDC

IPDC: Q2 Financials

EPS was Tk. 0.69 for April-June 2019 as against Tk. 0.42 for April-June 2018; EPS was Tk. 1.36 for January-June 2019 as against Tk. 0.72 for January-June 2018. NOCFPS was Tk. 2.56 for January-June 2019 as against Tk. (2.48) for January-June 2018. NAV per share was Tk. 16.64 as on June 30, 2019 and Tk. 15.92 as on December 31, 2018.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BANGAS	295.0	295.0	1	5,000	1.5
BARKAPOWER	24.9	24.9	1	161,877	4.0
BRACBANK	61.3	61.3	1	10,318,474	632.5
EHL	54.3	54.3	1	14,000	0.8
NITOLINS	31.4	31.4	1	40,000	1.3
PRIMEINSUR	23.6	23.6	1	820,000	19.4
SIMTEX	23.9	23.9	2	50,000	1.2
SINOBANGLA	70.2	70.2	1	32,000	2.2
SQURPHARMA	250.0	247.0	2	252,686	63.1

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

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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