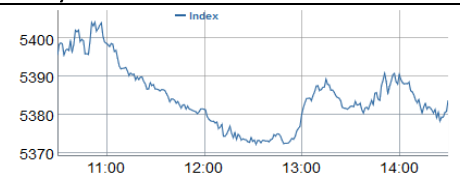


MARKET DOWN 11.73 POINTS

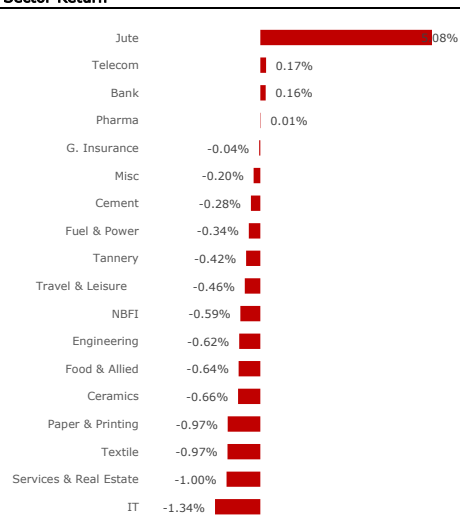
Market closed flat amid lacklustre participation from investors. Broad index, DSEX, lost 11.73 points fetching a turnover of BDT 3.38bn which is 24.11% lower than previous session. Predicament arose following the proposal of imposing tax on stock dividend and retained earnings in excess of 50% of paid-up capital. Investors are still waiting for further clarification on this matter and adopting cautious approach as regulatory unpredictability is creating some concerns.

Among major sectors, Bank, Telecom and Pharmaceuticals advanced marginally while IT, Services & Real Estate and Textile faced major correction. UPGDCL, EASTERNINS and GLOBALINS topped turnover chart.

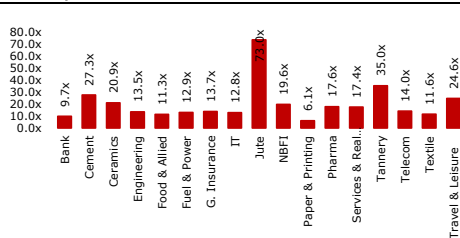
Intraday Performance of DSEX



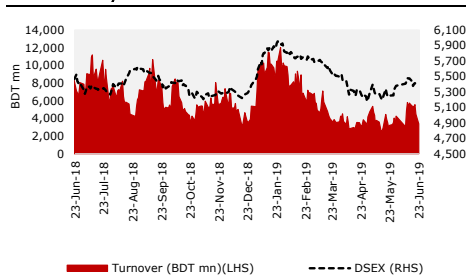
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

| Particulars | Value | Δ Points | Daily Δ % | Dec'18 Value | YTD Δ % |
|--------------|-----------|----------|-----------|--------------|---------|
| DSEX | 5,383.90 | (11.73) | -0.22% | 5,385.64 | -0.03% |
| DS30 | 1,896.72 | 2.33 | 0.12% | 1,880.78 | 0.85% |
| DSES | 1,231.43 | (1.85) | -0.15% | 1,232.82 | -0.11% |
| Dow Jones IA | 26,719.13 | (34.04) | -0.13% | 22,878.45 | 16.79% |
| Nikkei 225 | 21,258.64 | (204.22) | -0.95% | 20,077.62 | 5.88% |
| FTSE 100 | 7,407.50 | (16.94) | -0.23% | 6,617.38 | 11.94% |

Market Statistics

| Particulars | Today | Last Day | Daily Δ | Daily Δ % | 60 Day MA |
|---------------------|---------------|--------------|------------------|-----------|-----------|
| Turnover (BDT mn) | 3,382 | 4,457 | (1,074.69) | -24.11% | 3,858 |
| Turnover (USD mn) | 40.26 | 53.06 | (12.79) | -24.11% | 46 |
| Volume (mn) | 100 | 134 | (33.33) | -24.91% | 104 |
| Market Cap (BDT bn) | 3,970 | 3,979 | (8.89) | -0.22% | |
| Market Cap (USD bn) | 47 | 47 | (0.11) | -0.22% | |
| Market P/E (x) | 13.54 | | | | |
| Particulars | Galner | Loser | Unchanged | | |
| Market Breadth | 88 | 221 | 40 | | |

Sector Statistics

| Sector | Market Cap (BDTmn) | % of total Market Cap | Sector Return | Turnover (BDTmn) | % of total Turnover |
|------------------------|--------------------|-----------------------|---------------|------------------|---------------------|
| Bank | 549,393 | 13.84% | 0.2% | 268.7 | 7.95% |
| Telecom | 509,184 | 12.83% | 0.2% | 73.4 | 2.17% |
| Pharma | 480,562 | 12.11% | 0.0% | 311.4 | 9.21% |
| Fuel & Power | 467,946 | 11.79% | -0.3% | 290.8 | 8.60% |
| Food & Allied | 306,775 | 7.73% | -0.6% | 130.8 | 3.87% |
| NBFI | 180,689 | 4.55% | -0.6% | 105.4 | 3.12% |
| Engineering | 148,626 | 3.74% | -0.6% | 279.4 | 8.26% |
| Misc | 108,731 | 2.74% | -0.2% | 221.0 | 6.53% |
| Textile | 91,723 | 2.31% | -1.0% | 396.0 | 11.71% |
| Cement | 88,346 | 2.23% | -0.3% | 30.1 | 0.89% |
| G. Insurance | 52,484 | 1.32% | 0.0% | 618.3 | 18.28% |
| Tannery | 25,453 | 0.64% | -0.4% | 133.2 | 3.94% |
| Ceramics | 24,710 | 0.62% | -0.7% | 71.7 | 2.12% |
| Travel & Leisure | 20,543 | 0.52% | -0.5% | 7.9 | 0.23% |
| Services & Real Estate | 17,156 | 0.43% | -1.0% | 43.0 | 1.27% |
| IT | 12,125 | 0.31% | -1.3% | 68.2 | 2.02% |
| Jute | 3,991 | 0.10% | 5.1% | 30.5 | 0.90% |
| Paper & Printing | 2,173 | 0.05% | -1.0% | 8.3 | 0.24% |

Top Turnover

| Ticker | Close Price (BDT) | Daily Δ % | Turnover (BDTmn) | Volume (mn) | P/E (x) |
|------------|-------------------|-----------|------------------|-------------|---------|
| UPGDCL | 368.60 | -1.23% | 165.76 | 0.44 | 21.46 |
| EASTERNINS | 57.30 | 2.32% | 134.23 | 2.39 | 18.13 |
| GLOBALINS | 32.20 | 4.55% | 100.44 | 3.15 | 14.64 |
| FORTUNE | 35.80 | 2.29% | 93.29 | 2.63 | 16.08 |
| SQRPHARMA | 260.60 | -0.04% | 73.54 | 0.28 | 16.38 |

Top Gainers

| Ticker | Close Price (BDT) | Daily Δ % | Turnover (BDTmn) | Volume (mn) | P/E (x) |
|------------|-------------------|-----------|------------------|-------------|---------|
| CENTRALINS | 27.50 | 10.00% | 53.94 | 2.02 | 10.91 |
| SAVAREFR | 119.60 | 9.72% | 1.22 | 0.01 | n/a |
| PLFSL | 5.10 | 8.51% | 3.11 | 0.61 | n/a |
| NORTHERN | 1112.10 | 6.25% | 3.00 | 0.00 | 46.03 |
| 1STPRIMFMF | 10.50 | 6.06% | 11.15 | 1.07 | 10.94 |

Top Losers

| Ticker | Close Price (BDT) | Daily Δ % | Turnover (BDTmn) | Volume (mn) | P/E (x) |
|------------|-------------------|-----------|------------------|-------------|---------|
| POPULARLIF | 96.30 | -4.65% | 0.55 | 0.01 | - |
| MIDASFIN | 20.50 | -4.65% | 14.72 | 0.71 | 16.53 |
| BANGAS | 286.50 | -4.53% | 28.16 | 0.10 | 65.91 |
| ILFSL | 11.10 | -4.31% | 16.12 | 1.44 | 13.88 |
| NEWLINE | 23.20 | -4.13% | 36.83 | 1.56 | 11.84 |

UPGDCL

Acquisition of 75% shares of LGBDL & expiry of rental power contract

The Company has informed that the Board of Directors has decided to acquire 75%, equivalent to 3,00,000 ordinary shares of Leviathan Global BD Ltd. (LGBDL) at Face Value of Tk. 10.00 per share each, held by United Enterprises & Co. Ltd. (UECL) which is a wholly owned subsidiary company of UPGDCL. LGBDL is a 50 MW IPP gas fired power plant having a contract period of 30 years (extendable for further 30 years), built under joint venture with Leviathan Global BD Ltd., USA and UECL respectively. The plant is located at Karnaphuli EPZ (KEPZ) in Chattogram and will be operated under an agreement with Bangladesh Export Processing Zone Authority (BEPZA). Shares will be acquired with effect from 1st July 2019 while the expected Commercial Operation Date (COD) of LGBDL is August, 2019. It is to be further informed that the contract for supply of electricity under the rental power arrangement with respect to United Energy Ltd. (UEL) 53 MW Power Plant, located at Ashuganj, is going to expire on 22nd June, 2019. Application for subsequent renewal of the contract has been submitted with the Ministry of Power, Energy & Mineral Resources and is under active consideration at the moment. The other power generation plant of UEL consisting of 28 MW, located at Sylhet, is fully operational.

BEACHHATCH

Final Agreement with AquaOptima AS of Trondheim, Norway & Local Agent

With reference to their earlier news disseminated by DSE on 28.04.2019 regarding diversification of business through farming white fish, the Company has further informed that the management of the company has signed the final Agreement with AquaOptima AS of Trondheim, Norway and Local Agent Agile Resources, LR Villa Concord, House-9, Road-113, Gulshan-2, Dhaka.

Block Trade

| Ticker | Max Price (BDT) | Min Price (BDT) | No. of Trades | Volume | Value (BDTmn) |
|------------|-----------------|-----------------|---------------|---------|---------------|
| BATBC | 1,351.0 | 1,351.0 | 1 | 3,000 | 4.1 |
| CITYBANK | 27.1 | 27.1 | 1 | 42,000 | 1.1 |
| CONFIDCEM | 158.0 | 158.0 | 1 | 60,000 | 9.5 |
| EASTERNINS | 60.2 | 59.8 | 11 | 517,300 | 31.1 |
| GLAXOSMITH | 1,470.0 | 1,470.0 | 1 | 4,200 | 6.2 |
| GP | 360.4 | 360.4 | 1 | 2,000 | 0.7 |
| KTL | 21.0 | 21.0 | 1 | 120,000 | 2.5 |
| NATLIFEINS | 236.0 | 236.0 | 1 | 7,000 | 1.7 |
| SHURWID | 32.8 | 32.8 | 1 | 57,000 | 1.9 |
| UPGDCL | 346.0 | 346.0 | 2 | 10,000 | 3.5 |

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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