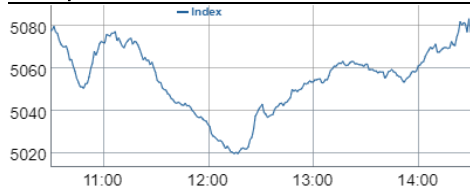


**MARKET DOWN 0.46 POINTS**

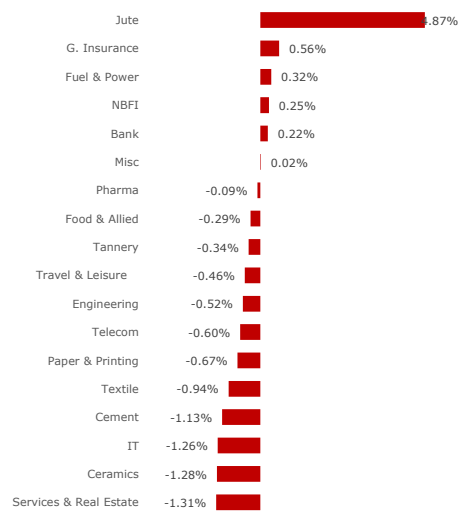
Market closed flat exhibiting volatility throughout the session as investors traded on fragile confidence. Turnover increased by 20% and stood at BDT 3.81bn. Meanwhile, the DSE requested all stock brokers to ensure legal authorisation when it comes to placing of any sale order. Such a move slowed the selling spree. In another news, the EPS of Heidelberg Cement Bangladesh Limited has turned negative in April-June quarter due to higher cost of goods sold and lower financial income.

Among major sectors, fuel and power, bank and NBFi closed positive today. Pharma sector dominated the turnover chart as SQRPHARMA was the most traded share today. BSC, UPGDCL, FORTUNE and BEACONPHAR were among other top traded shares.

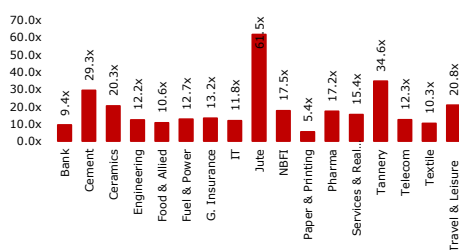
**Intraday Performance of DSEX**



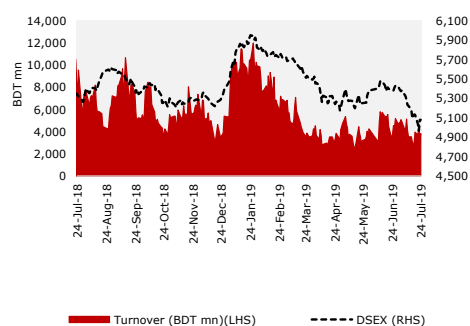
**Sector Return**



**Sector P/E**



**52 Week Daily Turnover & DSEX**



**Index**

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,077.29	(0.46)	-0.01%	5,385.64	-5.73%
DS30	1,816.70	2.08	0.11%	1,880.78	-3.41%
DSES	1,160.82	(3.90)	-0.34%	1,232.82	-5.84%
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)	3,806	3,171	635.32	20.04%	4,033
Turnover (USD mn)	45.31	37.75	7.56	20.04%	48
Volume (mn)	168	128	40.00	31.32%	128
Market Cap (BDT bn)	3,795	3,792	2.57	0.07%	
Market Cap (USD bn)	45	45	0.03	0.07%	
Market P/E (x)	12.74				

Particulars	Gain	Loser	Unchanged
Market Breadth	143	178	32

**Sector Statistics**

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	530,938	13.99%	0.2%	221.4	5.82%
Pharma	467,466	12.32%	-0.1%	540.1	14.19%
Fuel & Power	460,751	12.14%	0.3%	286.8	7.53%
Telecom	451,221	11.89%	-0.6%	128.8	3.38%
Food & Allied	286,408	7.55%	-0.3%	74.3	1.95%
NBFi	159,671	4.21%	0.3%	96.5	2.53%
Engineering	134,867	3.55%	-0.5%	253.1	6.65%
Misc	103,749	2.73%	0.0%	298.1	7.83%
Textile	81,550	2.15%	-0.9%	301.9	7.93%
Cement	80,944	2.13%	-1.1%	33.8	0.89%
G. Insurance	50,409	1.33%	0.6%	429.4	11.28%
Tannery	25,127	0.66%	-0.3%	149.4	3.93%
Ceramics	21,229	0.56%	-1.3%	65.7	1.73%
Travel & Leisure	19,312	0.51%	-0.5%	81.1	2.13%
Services & Real Estate	15,176	0.40%	-1.3%	16.9	0.44%
IT	11,211	0.30%	-1.3%	48.8	1.28%
Jute	3,363	0.09%	4.9%	13.3	0.35%
Paper & Printing	1,918	0.05%	-0.7%	17.3	0.46%

**Top Turnover**

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SQRPHARMA	250.00	-0.28%	145.98	0.58	15.72
BSC	52.10	5.25%	145.68	2.83	22.20
UPGDCL	379.40	0.53%	121.30	0.32	22.09
FORTUNE	38.90	-0.26%	118.31	3.03	17.47
BEACONPHAR	22.40	5.16%	96.79	4.42	30.00

**Top Gainers**

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
CNATEX	2.20	10.00%	0.78	0.37	3.06
ILFSL	6.60	10.00%	12.18	1.86	18.33
ICB3RDNRB	6.70	9.84%	11.74	1.81	15.70
SEMLFBSLGF	40.40	9.78%	4.33	0.11	1,010.00
SEMLIBLSF	14.80	9.63%	0.75	0.05	15.86

**Top Losers**

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
HEIDELBCEM	204.00	-8.60%	10.71	0.05	37.92
VAMLBDMF1	9.30	-7.92%	11.60	1.21	77.50
VAMLRBBF	10.20	-7.27%	11.68	1.11	n/a
DELTAASPINN	4.40	-6.38%	1.12	0.25	16.50
MICEMENT	56.80	-6.27%	0.20	0.00	39.81

## RUPALIBANK

### RUPALIBANK: Q2 Financials

Consolidated EPS was Tk. 0.28 for January-June 2019 as against Tk. 0.35 for January-June 2018. Consolidated NOCFPS was Tk. (98.26) for January-June 2019 as against Tk. 29.88 for January-June 2018. Consolidated NAV per share was Tk. 45.98 as on June 30, 2019 and Tk. 45.73 as on December 31, 2018. Consolidated EPS was Tk. 0.03 for April-June 2019 as against Tk. 0.14 for April-June 2018.

## ISLAMICFIN

### ISLAMICFIN: Q2 Financials

EPS was Tk. 0.30 for April-June 2019 as against Tk. 0.29 for April-June 2018; EPS was Tk. 0.66 for January-June 2019 as against Tk. 0.58 for January-June 2018. NOCFPS was Tk. (6.80) for January-June 2019 as against Tk. 3.30 for January-June 2018. NAV per share was Tk. 13.72 as on June 30, 2019 and Tk. 12.86 as on June 30, 2018.

## UTTARABANK

### UTTARABANK: Q2 Financials

Consolidated EPS was Tk. 1.58 for April-June 2019 as against Tk. 0.98 for April-June 2018; Consolidated EPS was Tk. 2.50 for January-June 2019 as against Tk. 1.35 for January-June 2018. Consolidated NOCFPS was Tk. (13.57) for January-June 2019 as against Tk. 7.97 for January-June 2018. Consolidated NAV per share was Tk. 34.64 as on June 30, 2019 and Tk. 34.29 as on June 30, 2018. The Company also informed that Net Operating Cash Flow Per Share (NOCFPS) has been decreased in the current period mainly due to increase of cash payment to employees, income tax paid and decrease of deposits from customers and other assets and other liabilities etc. compared to the previous corresponding period.

## MERCINS

### MERCINS: Q2 Financials

EPS was Tk. 0.18 for April-June 2019 as against Tk. 0.33 for April-June 2018; EPS was Tk. 0.80 for January-June 2019 as against Tk. 1.01 for January-June 2018. NOCFPS was Tk. 0.52 for January-June 2019 as against Tk. 0.82 for January-June 2018. NAV per share was Tk. 18.06 as on June 30, 2019 and Tk. 17.93 as on December 31, 2018.

## LRGLOBMF1

### LRGLOBMF1: Q3 Financials

EPU was Tk. (0.14) for April-June 2019 as against Tk. 0.19 for April-June 2018; EPU was Tk. 0.04 for October 2018-June 2019 as against Tk. 0.25 for October 2017-June 2018. NOCFPU was Tk. 0.22 for October 2018-June 2019 as against Tk. 0.22 for October 2017-June 2018. NAV per unit at market price was Tk. 11.01 as on June 30, 2019 and Tk. 11.09 as on September 30, 2018. NAV per unit at cost price was Tk. 10.08 as on June 30, 2019 and Tk. 10.59 as on September 30, 2018.

## VAMLBDMF1

### VAMLBDMF1: Q3 Financials

EPU was Tk. (0.15) for April-June 2019 as against Tk. (0.16) for April-June 2018; EPU was Tk. 0.09 for October 2018-June 2019 as against Tk. 0.43 for October 2017-June 2018. NOCFPU was Tk. 0.13 for October 2018-June 2019 as against Tk. 0.06 for October 2017-June 2018. NAV per unit at market price was Tk. 10.45 as on June 30, 2019 and Tk. 10.86 as on September 30, 2018. NAV per unit at cost price was Tk. 10.83 as on June 30, 2019 and Tk. 11.04 as on September 30, 2018.

## HEIDELBCEM

### HEIDELBCEM: Q2 Financials

Consolidated EPS was Tk. (0.72) for April-June 2019 as against Tk. 4.21 for April-June 2018; Consolidated EPS was Tk. 2.69 for January-June 2019 as against Tk. 9.55 for January-June 2018. Consolidated NOCFPS was Tk. 5.78 for January-June 2019 as against Tk. 10.81 for January-June 2018. Consolidated NAV per share was Tk. 77.87 as on June 30, 2019 and Tk. 82.68 as on December 31, 2018. It is to be noted that compare to same period of previous year, NAV per share reduced due to charging of regular depreciation and decrease of inventory. EPS declined by Tk. 6.86 due to higher cost of goods sold and lower financial income. NOCFPS decrease for lower sales collection, increase of supplier payment and more advance tax payment in import stage.

## Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ASIAINS	26.0	26.0	1	20,000	0.5
DHAKAINS	34.2	34.2	1	33,000	1.1
FORTUNE	41.4	41.4	1	35,000	1.4
GP	323.7	323.7	1	5,332	1.7
IBNSINA	234.3	234.3	1	25,000	5.9
IFIC	9.5	9.5	1	60,000	0.6
MARICO	1,523.0	1,523.0	1	2,198	3.3
SAIHAMCOT	25.5	25.5	1	116,500	3.0
UPGDCL	380.5	380.5	3	5,500	2.1

## Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
KAY&QUE	Engineering			Compulsory Spot	
AZIZPIPES	Engineering			Compulsory Spot	
PRAGATILIF	L. Insurance	25-Aug-19	28-Jul-19	24-Jul-19	25-Jul-19
GP	Telecom		4-Aug-19	31-Jul-19	1-Aug-19
REGENTTEX	Textile	29-Aug-19	28-Jul-19	24-Jul-19	25-Jul-19
MEGHNALIFE	L. Insurance	26-Sep-19	1-Sep-19		
FAREASTFIN	NBFI	4-Sep-19	19-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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