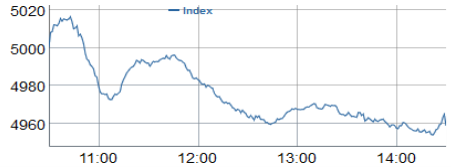


MARKET DOWN 41.51 POINTS

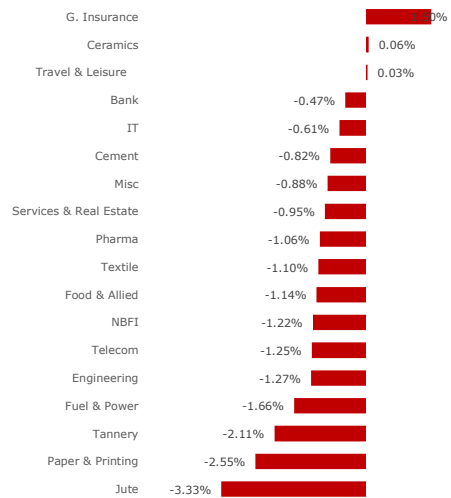
Market slid as investors opted for sell-off after two-days gain of 144 points. Broad index, DSEX, lost 41.51 points (0.83% down) with a turnover of BDT 4.06bn (21.59% down). Investors displayed mixed reaction towards Bangladesh Bank's stance in providing liquidity support for increasing Banks' investment in capital market. Dearth of liquidity is still keeping the market in the bear territory for an extended period.

Large cap scrips namely GP, UPGDCL and BATBC led the downturn of index. Most of the sectors faced correction except General Insurance, Ceramics and Travel & Leisure sectors. Investors activities were mostly concentrated on General Insurance, Pharmaceuticals and Engineering sectors.

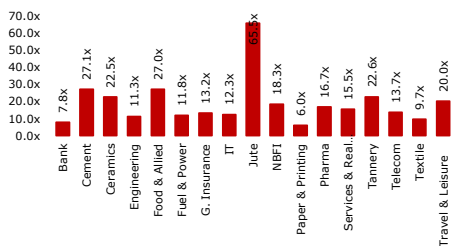
Intraday Performance of DSEX



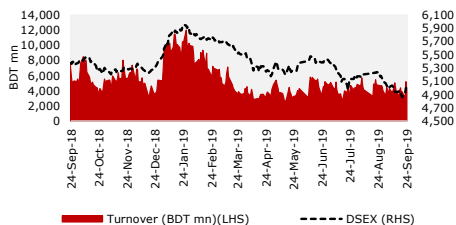
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	4,958.72	(41.51)	-0.83%	5,385.64	-7.93%
DS30	1,774.11	(15.86)	-0.89%	1,880.78	-5.67%
DSES	1,145.30	(12.86)	-1.11%	1,232.82	-7.10%
Dow Jones IA	26,949.99	14.92	0.06%	22,878.45	17.80%
Nikkei 225	22,098.84	19.75	0.09%	20,077.62	10.07%
FTSE 100	7,327.70	1.62	0.02%	6,617.38	10.73%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,056	5,173	(1,117.14)	-21.59%	4,230
Turnover (USD mn)	48.29	61.59	(13.30)	-21.59%	50
Volume (mn)	128	143	(14.74)	-10.31%	128
Market Cap (BDT bn)	3,759	3,792	(33.26)	-0.88%	
Market Cap (USD bn)	45	45	(0.40)	-0.88%	
Market P/E (x)	13.00				

Particulars	Gain	Loser	Unchanged
Market Breadth	103	214	34

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	510,643	13.59%	-0.5%	225.0	5.55%
Telecom	503,027	13.38%	-1.2%	203.0	5.00%
Pharma	478,279	12.72%	-1.1%	560.4	13.81%
Fuel & Power	422,048	11.23%	-1.7%	290.3	7.16%
Food & Allied	269,066	7.16%	-1.1%	95.0	2.34%
NBFI	150,577	4.01%	-1.2%	94.4	2.33%
Engineering	132,062	3.51%	-1.3%	511.7	12.62%
Misc	108,770	2.89%	-0.9%	117.4	2.89%
Cement	78,733	2.09%	-0.8%	18.4	0.45%
Textile	75,750	2.02%	-1.1%	261.9	6.46%
G. Insurance	50,730	1.35%	1.5%	750.7	18.51%
Ceramics	23,505	0.63%	0.1%	92.8	2.29%
Tannery	23,125	0.62%	-2.1%	251.9	6.21%
Travel & Leisure	18,611	0.50%	0.0%	15.8	0.39%
Services & Real Estate	15,140	0.40%	-0.9%	14.2	0.35%
IT	11,662	0.31%	-0.6%	49.2	1.21%
Jute	3,582	0.10%	-3.3%	13.1	0.32%
Paper & Printing	2,149	0.06%	-2.5%	9.4	0.23%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FORTUNE	29.90	-9.12%	197.28	6.47	13.43
GP	358.40	-1.21%	171.16	0.48	13.40
BEACONPHAR	27.90	0.36%	122.43	4.41	37.37
SONARBAINS	32.10	6.29%	115.09	3.57	16.72
NLTUBES	154.00	-3.57%	112.33	0.71	n/a

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SEMLLECMF	6.60	10.00%	11.04	1.71	12.00
SEMLFBSLGF	15.60	9.86%	22.60	1.49	41.05
SEMLIBLSF	10.20	9.68%	7.75	0.77	17.89
VAMLBDMF1	6.90	9.52%	3.19	0.47	57.50
ICBAGRANI1	5.90	9.26%	5.13	0.89	11.80

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
FORTUNE	29.90	-9.12%	197.28	6.47	13.43
TUNGHAI	2.60	-7.14%	0.28	0.11	3.20
MONNOSTAF	1472.90	-6.18%	102.07	0.07	193.80
SAIHAMTEX	36.50	-5.19%	0.51	0.01	19.98
MIRACLEIND	18.60	-5.10%	5.46	0.29	35.77

Daily Market Review

Market closed negative after two-days gain

24-Sep-2019

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BEACONPHAR	28.0	27.8	9	5,930,000	165.6
BRACBANK	62.2	62.2	1	150,000	9.3
GP	357.0	357.0	1	20,000	7.1
JAMUNABANK	18.9	18.9	1	1,000,000	18.9
LINDEBD	1,315.0	1,315.0	1	800	1.1
PADMAOIL	200.0	200.0	1	225,000	45.0
SINOBANGLA	71.0	71.0	1	35,000	2.5
SKTRIMS	43.0	43.0	1	11,700	0.5
UPGDCL	333.0	333.0	1	4,000	1.3

Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
KAY&QUE	Engineering			Compulsory Spot	
AZIZPIPES	Engineering			Compulsory Spot	
MONNOCERA	Ceramics			Compulsory Spot	
AL-HAJTEX	Textile			Compulsory Spot	
NPOLYMAR	Engineering	15-Oct-19	22-Sep-19		
DOREENPWR	Fuel & Power	12-Dec-19	13-Oct-19		
PADMALIFE	L. Insurance		13-Oct-19		
KDSALTD	Engineering	7-Nov-19	1-Oct-19		
BSRMLTD	Engineering	19-Dec-19	27-Oct-19		
BSRMSTEEL	Engineering	19-Dec-19	27-Oct-19		
RUNNERAUTO	Engineering	25-Nov-19	15-Oct-19		
ARGONDENIM	Textile	28-Oct-19	13-Oct-19		
ETL	Textile	28-Oct-19	13-Oct-19		
APEXTANRY	Tannery	21-Oct-19	25-Sep-19	23-Sep-19	24-Sep-19
APEXFOOT	Tannery	12-Nov-19	13-Oct-19		
JMISMDL	Pharma	23-Nov-19	13-Oct-19		
EHL	Services & Re:	14-Nov-19	17-Oct-19		
IBNSINA	Pharma	14-Nov-19	14-Oct-19		
SUMITPOWER	Fuel & Power	24-Nov-19	17-Oct-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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