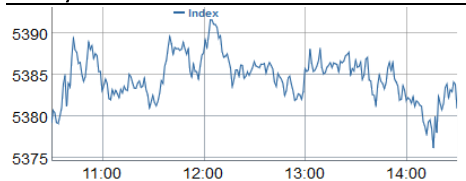


MARKET UP 1.81 POINTS

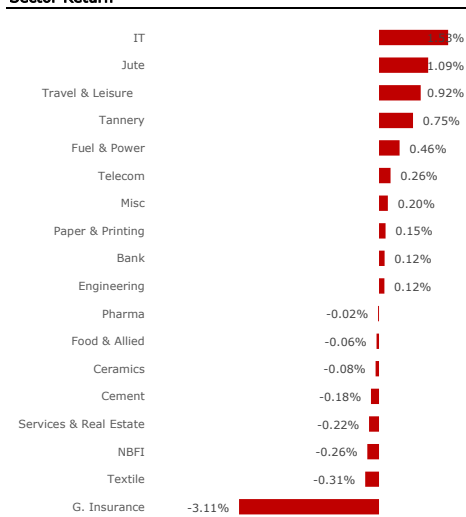
Market remained flat throughout the day as investors oscillated between optimism and uncertainty regarding regulatory stance prior to budget passage for FY20. Investors digested news regarding possibility of lifting the proposal for imposing tax on retained earnings and reserves. Broad index, DSEX, went up marginally by 1.81 points with some improvement in turnover. Turnover was BDT 4.53bn (up by 19.89%) by end of the session.

Among major sectors, IT, Fuel & Power and Telecommunication posted positive return while General Insurance, Textile and NBFI faced correction. JMISMDL, UPGDCL and GENEXIL topped the turnover chart.

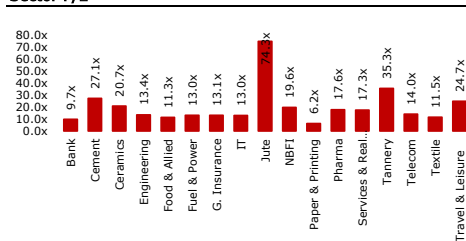
Intraday Performance of DSEX



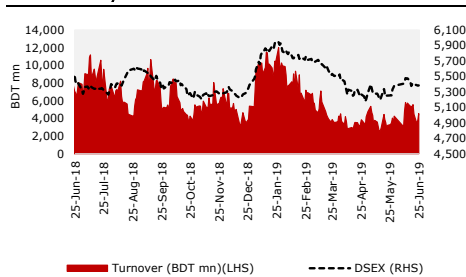
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,380.96	1.81	0.03%	5,385.64	-0.09%
DS30	1,896.49	2.67	0.14%	1,880.78	0.84%
DSES	1,230.81	0.77	0.06%	1,232.82	-0.16%
Dow Jones IA	26,727.54	8.41	0.03%	22,878.45	16.82%
Nikkei 225	21,193.81	(92.18)	-0.43%	20,077.62	5.56%
FTSE 100	7,397.43	(19.26)	-0.26%	6,617.38	11.79%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,534	3,782	752.28	19.89%	3,855
Turnover (USD mn)	53.97	45.02	8.96	19.89%	46
Volume (mn)	122	125	(2.89)	-2.32%	105
Market Cap (BDT bn)	3,969	3,967	2.35	0.06%	
Market Cap (USD bn)	47	47	0.03	0.06%	
Market P/E (x)	13.52				
Particulars	Galner	Loser	Unchanged		
Market Breadth	131	161	57		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	549,065	13.83%	0.1%	444.9	9.81%
Telecom	507,198	12.78%	0.3%	143.9	3.17%
Pharma	479,973	12.09%	0.0%	583.8	12.88%
Fuel & Power	471,290	11.87%	0.5%	361.7	7.98%
Food & Allied	306,980	7.73%	-0.1%	183.8	4.05%
NBFI	180,461	4.55%	-0.3%	112.0	2.47%
Engineering	148,013	3.73%	0.1%	505.0	11.14%
Misc	109,098	2.75%	0.2%	297.6	6.56%
Textile	91,635	2.31%	-0.3%	486.2	10.72%
Cement	87,493	2.20%	-0.2%	42.6	0.94%
G. Insurance	50,312	1.27%	-3.1%	534.4	11.79%
Tannery	25,681	0.65%	0.8%	111.8	2.47%
Ceramics	24,496	0.62%	-0.1%	87.8	1.94%
Travel & Leisure	20,643	0.52%	0.9%	19.0	0.42%
Services & Real Estate	17,083	0.43%	-0.2%	38.4	0.85%
IT	12,287	0.31%	1.5%	184.0	4.06%
Jute	4,063	0.10%	1.1%	37.3	0.82%
Paper & Printing	2,213	0.06%	0.1%	7.4	0.16%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
JMISMDL	482.50	3.45%	241.02	0.50	73.70
UPGDCL	375.40	1.65%	197.48	0.53	21.86
GENEXIL	54.80	3.79%	127.26	2.34	23.76
GLOBALINS	30.80	-4.35%	122.40	3.85	14.00
BSC	51.60	-0.19%	106.92	2.06	21.99

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
1STPRIMFMF	12.60	9.57%	36.26	2.94	13.13
SEMLLECMF	8.00	8.11%	7.42	0.95	7.41
RUNNERAUTO	87.80	7.73%	98.06	1.15	18.39
BANGAS	298.10	5.60%	40.80	0.14	68.58
STANCERAM	257.30	5.49%	11.32	0.04	126.96

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
AL-HAJTEX	63.70	-9.90%	27.35	0.43	n/a
EASTERNINS	49.70	-8.30%	70.79	1.39	15.73
NORTHRNINS	24.20	-7.63%	21.28	0.86	11.42
CENTRALINS	25.20	-7.01%	17.25	0.67	10.00
UNITEDINS	60.40	-5.77%	29.23	0.48	79.47

LIBRAINFU

LIBRAINFU: Q3 Financials

EPS was Tk. (11.38) for January-March 2019 as against Tk. (12.13) for January-March 2018; EPS was Tk. (18.07) for July 2018-March 2019 as against Tk. (12.65) for July 2017-March 2018. NOCFPS was Tk. 2.84 for July 2018-March 2019 as against Tk. 9.70 for July 2017-March 2018. NAV per share was Tk. 1,309.82 as on March 31, 2019 and Tk. 1,565.31 as on March 31, 2018.

AL-HAJTEX

AL-HAJTEX: Decision to Lay off the Factory for 30 days

The Company has informed that the Board of Directors has decided to lay off the factory for 30 days with effect from June 25, 2019 at 7:00 AM to July 24, 2019 due to severe fall in volume of sales as a result of lack of demand in the market and shortage of storage facilities for holding stock of finished goods in the godown and also severe blockage of working capital.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AGRANINS	27.2	27.2	1	22,000	0.6
BSCCL	146.0	146.0	1	8,000	1.2
EASTLAND	30.0	30.0	1	50,000	1.5
GP	360.0	360.0	4	197,000	70.9
NATLIFEINS	235.0	235.0	1	14,090	3.3
NORTHRNINS	25.2	25.2	1	198,000	5.0
PROVATIINS	29.0	29.0	1	400,000	11.6
SQURPHARMA	261.2	260.8	2	40,858	10.7
SUMITPOWER	45.2	45.2	1	380,000	17.2
UPGDCL	340.0	340.0	1	24,000	8.2

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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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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