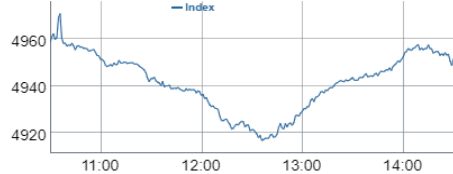


MARKET DOWN 6.98 POINTS

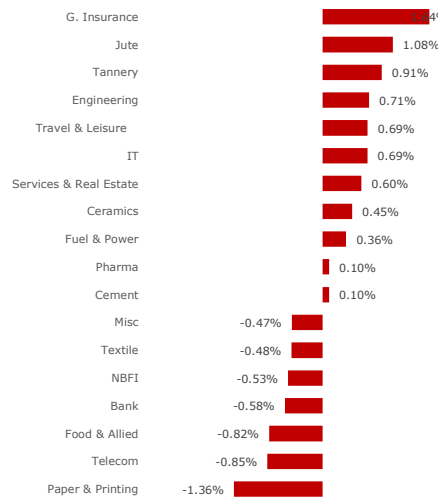
Market closed in red for the second successive day as investors' selling pressure continues. Broad index, DSEX, lost 6.98 points fetching a turnover of BDT 3.1bn. Market turnover was 21.5% lower compared to last session.

Engineering and Fuel & Power was among today's gainers. (0.71% and 0.36%, respectively). Telecommunication, Banks and NBFIs were among top losers as they fell 0.8%, 0.5% and 0.6%, respectively. Among large caps, GP, BATBC and SQRPHARMA lost value while UPGDCL gained in today's session. General insurance, Pharmaceuticals and Engineering stocks topped the turnover chart.

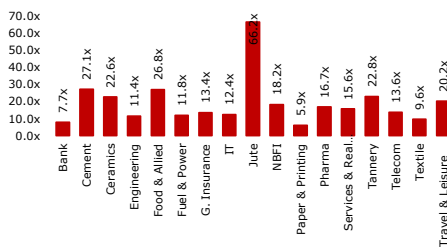
Intraday Performance of DSEX



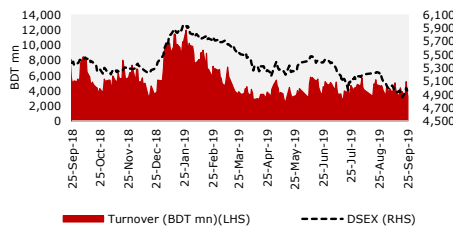
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	4,951.74	(6.98)	-0.14%	5,385.64	-8.06%
DS30	1,766.71	(7.40)	-0.42%	1,880.78	-6.07%
DSES	1,145.70	0.40	0.04%	1,232.82	-7.07%
Dow Jones IA	26,807.77	-142.22	-0.53%	22,878.45	17.17%
Nikkei 225	22,020.15	(78.69)	-0.36%	20,077.62	9.68%
FTSE 100	7,216.18	(75.25)	-1.03%	6,617.38	9.05%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	3,184	4,056	(871.90)	-21.49%	4,220
Turnover (USD mn)	37.91	48.29	(10.38)	-21.49%	50
Volume (mn)	106	128	(22.25)	-17.35%	127
Market Cap (BDT bn)	3,751	3,759	(7.93)	-0.21%	
Market Cap (USD bn)	45	45	(0.09)	-0.21%	
Market P/E (x)	12.97				

Particulars	Gain	Loser	Unchanged
Market Breadth	147	141	65

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	507,681	13.54%	-0.6%	186.4	5.85%
Telecom	498,753	13.30%	-0.8%	93.1	2.92%
Pharma	478,760	12.76%	0.1%	314.3	9.87%
Fuel & Power	423,581	11.29%	0.4%	187.9	5.90%
Food & Allied	266,859	7.11%	-0.8%	77.9	2.45%
NBFI	149,781	3.99%	-0.5%	76.6	2.40%
Engineering	133,004	3.55%	0.7%	454.2	14.26%
Misc	108,256	2.89%	-0.5%	102.8	3.23%
Cement	78,811	2.10%	0.1%	13.3	0.42%
Textile	75,388	2.01%	-0.5%	219.7	6.90%
G. Insurance	51,563	1.37%	1.6%	770.4	24.19%
Ceramics	23,612	0.63%	0.5%	109.7	3.44%
Tannery	23,335	0.62%	0.9%	98.6	3.10%
Travel & Leisure	18,740	0.50%	0.7%	21.0	0.66%
Services & Real Estate	15,230	0.41%	0.6%	13.9	0.44%
IT	11,742	0.31%	0.7%	46.7	1.47%
Jute	3,620	0.10%	1.1%	10.3	0.32%
Paper & Printing	2,119	0.06%	-1.4%	5.7	0.18%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
MONNOSTAF	1403.30	-4.73%	118.09	0.08	184.64
SONARBAINS	32.90	2.49%	98.18	2.99	17.14
NLTUBES	164.20	6.62%	87.73	0.55	n/a
GP	355.10	-0.92%	67.93	0.19	13.28
VFSTDL	26.30	2.33%	67.78	2.60	10.90

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SEMLLECMF	7.10	7.58%	32.17	4.47	12.91
PEOPLESINS	22.70	7.08%	18.93	0.84	13.35
NLTUBES	164.20	6.62%	87.73	0.55	n/a
REPUBLIC	25.40	6.28%	38.19	1.50	14.94
RENWICKJA	1494.10	6.24%	6.95	0.00	318.35

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
MONNOSTAF	1403.30	-4.73%	118.09	0.08	184.64
NATLIFEINS	241.50	-4.09%	8.33	0.03	-
ARAMITCEM	14.60	-3.95%	0.02	0.00	n/a
AAMRATECH	23.60	-3.67%	0.96	0.04	14.87
BWELDING	16.80	-3.45%	0.31	0.02	n/a

Daily Market Review

Market closed flat with decreasing turnover

25-Sep-2019

FAREASTLIF

FAREASTLIF: Q1 Financials

Decrease in consolidated life revenue account for Jan-Mar, 2019 was Tk. 889.51 million with consolidated total life insurance fund of Tk. 32,439.75 million as against decrease in consolidated life revenue account of Tk. 1,012.83 million and Tk. 32,449.67 million respectively for the same period of the previous year.

FAREASTLIF

FAREASTLIF: Q2 Financials

Increase in consolidated life revenue account for Apr-June, 2019 was Tk. 1,546.53 million with consolidated total life insurance fund of Tk. 33,986.28 million as against increase in Tk. 1,480.68 million and Tk. 33,930.36 million respectively for the same period of the previous year. Increase in consolidated life revenue account for Jan-June, 2019 was Tk. 657.02 million with consolidated total life insurance fund of Tk. 33,986.28 million as against increase in Tk. 467.86 million and Tk. 33,930.36 million respectively for the same period of the previous year.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BANKASIA	17.0	17.0	1	1,011,000	17.2
BSCCL	121.0	121.0	1	12,000	1.5
POPULARLIF	99.0	99.0	1	1,200,000	118.8
SINGERBD	208.0	208.0	3	29,000	6.0

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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