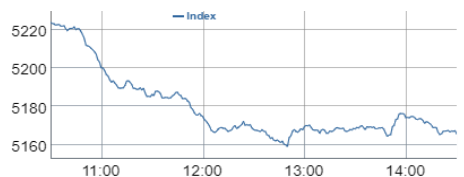


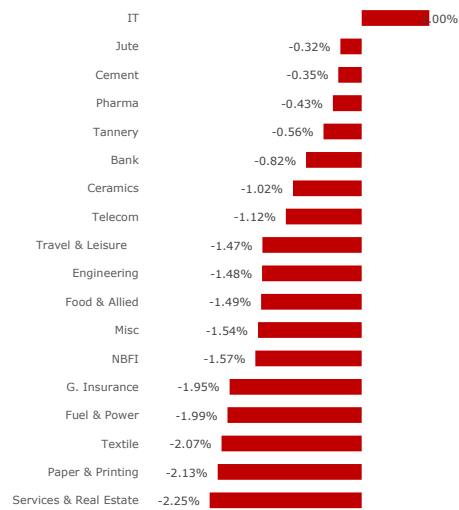
MARKET DOWN 57.96 POINTS

DSEX nosedived as large cap scrips such as GP, UPGDCL, BATBC and BRACBANK witnessed massive sell pressure. Selling pressure was apparent from the opening of the session and continued till the end. The High Court on Sunday declared legal the imposition of a BDT 300mn fine on GP by the Bangladesh Telecommunication Regulatory Commission (BTRC) for providing broadband internet services in violation of rules. The scrip fell 4.0% in last three trading session. The first half of 2019 saw a pickup in NPL - Government's initiative to allowing rescheduling default loans with just 2.0% down payment has worked as a stimulus for the bad borrowers. Among the 30 traded banking scrips, 22 lost value today.

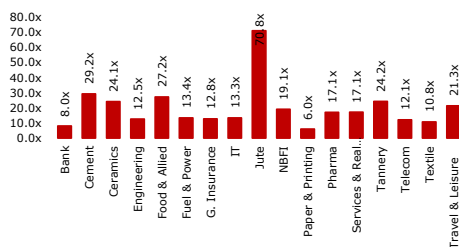
Intraday Performance of DSEX



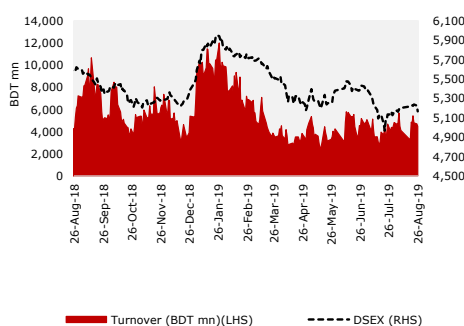
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,165.77	(57.96)	-1.11%	5,385.64	-4.08%
DS30	1,819.67	(22.10)	-1.20%	1,880.78	-3.25%
DSES	1,193.06	(10.68)	-0.89%	1,232.82	-3.23%
Dow Jones IA	25,628.90	(623.34)	-2.37%	2,2878.45	12.02%
Nikkei 225	20,261.04	(449.87)	-2.17%	20,077.62	0.91%
FTSE 100	7,094.98	(33.20)	-0.47%	6,617.38	7.22%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,472	4,690	(218.29)	-4.65%	4,310
Turnover (USD mn)	53.23	55.83	(2.60)	-4.65%	51
Volume (mn)	132	149	(17.51)	-11.75%	137
Market Cap (BDT bn)	3,831	3,868	(37.06)	-0.96%	
Market Cap (USD bn)	46	46	(0.44)	-0.96%	
Market P/E (x)	13.32				

Particulars	Gain	Loser	Unchanged
Market Breadth	55	276	22

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	526,421	13.74%	-0.8%	197.6	4.42%
Pharma	489,453	12.78%	-0.4%	834.8	18.67%
Fuel & Power	477,893	12.47%	-2.0%	462.6	10.35%
Telecom	443,207	11.57%	-1.1%	92.3	2.06%
Food & Allied	270,843	7.07%	-1.5%	120.8	2.70%
NBFI	157,180	4.10%	-1.6%	94.6	2.12%
Engineering	142,935	3.73%	-1.5%	625.4	13.99%
Misc	111,031	2.90%	-1.5%	278.8	6.23%
Textile	85,361	2.23%	-2.1%	482.4	10.79%
Cement	84,684	2.21%	-0.3%	28.7	0.64%
G. Insurance	49,162	1.28%	-2.0%	238.1	5.32%
Ceramics	25,241	0.66%	-1.0%	163.1	3.65%
Tannery	24,591	0.64%	-0.6%	89.8	2.01%
Travel & Leisure	19,821	0.52%	-1.5%	29.1	0.65%
Services & Real Estate	16,907	0.44%	-2.2%	46.8	1.05%
IT	12,644	0.33%	1.0%	208.3	4.66%
Jute	3,872	0.10%	-0.3%	15.9	0.36%
Paper & Printing	2,127	0.06%	-2.1%	24.6	0.55%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
UPGDCL	393.20	-3.32%	219.26	0.55	24.45
SILCOPHL	34.20	1.48%	144.36	4.29	21.02
ORIONINFU	67.20	-5.35%	127.09	1.85	35.49
MONNOCERA	210.30	1.79%	108.06	0.52	24.45
BSC	54.90	-2.66%	102.84	1.86	23.39

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ZEALBANGLA	35.60	7.88%	0.00	0.00	n/a
STANCERAM	415.90	5.72%	47.25	0.12	205.21
PRAGATILIF	151.20	4.78%	56.34	0.38	-
BENGALWTL	26.90	4.67%	19.29	0.71	21.02
PREMIERCCEM	74.10	4.51%	0.36	0.00	17.99

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SEMLFBSLGF	18.40	-9.80%	9.60	0.51	48.42
DACCADYE	3.70	-9.76%	0.44	0.12	n/a
GLOBALINS	29.70	-9.73%	36.94	1.21	26.05
TALLUSPIN	4.70	-9.62%	0.22	0.05	n/a
UNITEDAIR	2.00	-9.09%	7.96	3.81	n/a

Daily Market Review

Market drop on large caps' fall

26-Aug-2019

STANDARINS

STANDARINS: Credit Rating Result

ARGUS Credit Rating Services Limited (ACRSL) has announced the claim paying ability rating of the Company as "A+" for long term and "ST-2" for short term in consideration of financials of the Company up to December 31, 2018 (audited), Q2FY19 (unaudited) and other relevant quantitative as well as qualitative information up to the date of rating declaration.

MEGHNALIFE

MEGHNALIFE: Buy Declaration of a Corporate Director

Karnaphuli Insurance Co. Ltd., one of the Corporate Directors of the Company, has expressed its intention to buy 3,40,000 shares of the Company at prevailing market price (In the Block Market) through Stock Exchange (DSE) within next 30 working days.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BEACONPHAR	25.4	25.1	16	5,350,000	134.9
BRACBANK	60.0	60.0	2	1,164,000	69.8
GLAXOSMITH	1,619.6	1,619.6	3	12,600	20.4
MEGHNALIFE	60.0	60.0	3	340,000	20.4
MONNOCERA	215.0	215.0	1	3,000	0.6
PHENIXINS	28.0	28.0	2	53,000	1.5
SHEPHERD	40.5	40.5	1	27,650	1.1

Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
KAY&QUE	Engineering			Compulsory Spot	
AZIZPIPES	Engineering			Compulsory Spot	
MEGHNALIFE	L. Insurance	26-Sep-19	1-Sep-19		
EBLNRBMF	Mutual Fund		27-Aug-19		
PHPMF1	Mutual Fund		27-Aug-19		
POPULAR1MF	Mutual Fund		27-Aug-19		
SANDHANINS	L. Insurance	29-Sep-19	3-Sep-19		
EXIM1STMF	Mutual Fund		27-Aug-19		
FBFIF	Mutual Fund		27-Aug-19		
1JANATAMF	Mutual Fund		27-Aug-19		
IFIC1STMF	Mutual Fund		27-Aug-19		
TRUSTB1MF	Mutual Fund		27-Aug-19		
EBL1STMF	Mutual Fund		27-Aug-19		
RUPALILIFE	L. Insurance		29-Aug-19	27-Aug-19	28-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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