

MARKET UP 19.35 POINTS

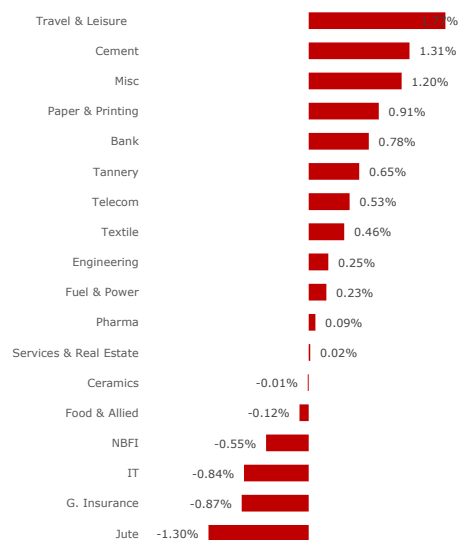
Market closed the session on positive note riding on large cap scrips namely GP, BRACBANK and BERGERPBL. Broad index, DSEX, gained 19.35 points with a turnover of BDT 5.17bn. Investors received news from different parties of capital market and government that budget reform is undergoing consideration especially regarding proposals related to capital market. Such anticipation led investors to exert buying binge on fundamentally sound scrips as investors expect a positive impact on capital market from the reform. Moreover, investors went for seeking scrips that are undervalued.

Among major sectors, Cement, Miscellaneous and Bank posted return while General Insurance, IT and NBFI faced correction. SQRPHARMA, UPGDCL and JMISMDL topped the turnover chart.

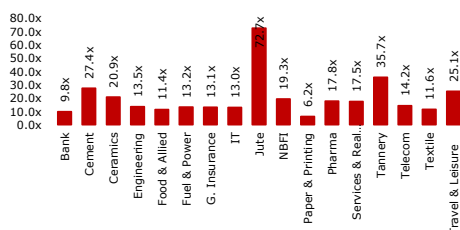
Intraday Performance of DSEX



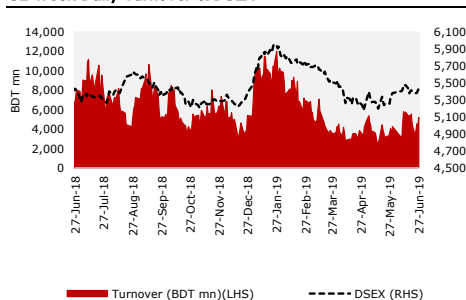
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,430.05	19.35	0.36%	5,385.64	0.82%
DS30	1,924.91	13.35	0.70%	1,880.78	2.35%
DSES	1,245.83	3.90	0.31%	1,232.82	1.06%
Dow Jones IA	26,536.82	(11.40)	-0.04%	22,878.45	15.99%
Nikkei 225	21,338.17	251.58	1.19%	20,077.62	6.28%
FTSE 100	7,386.22	(30.17)	-0.41%	6,617.38	11.62%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	5,174	4,316	857.08	19.86%	3,889
Turnover (USD mn)	61.59	51.39	10.20	19.86%	46
Volume (mn)	149	115	34.24	29.83%	107
Market Cap (BDT bn)	4,005	3,993	11.33	0.28%	
Market Cap (USD bn)	48	48	0.13	0.28%	
Market P/E (x)	13.66				
Particulars	Galner	Loser	Unchanged		
Market Breadth	147	154	51		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	554,681	13.85%	0.8%	495.8	9.58%
Telecom	516,048	12.89%	0.5%	187.7	3.63%
Pharma	483,894	12.08%	0.1%	700.2	13.53%
Fuel & Power	478,401	11.95%	0.2%	401.5	7.76%
Food & Allied	308,840	7.71%	-0.1%	278.5	5.38%
NBFI	178,123	4.45%	-0.6%	150.9	2.92%
Engineering	149,047	3.72%	0.3%	601.7	11.63%
Misc	110,261	2.75%	1.2%	289.3	5.59%
Textile	92,090	2.30%	0.5%	645.8	12.48%
Cement	88,732	2.22%	1.3%	61.3	1.18%
G. Insurance	50,387	1.26%	-0.9%	450.3	8.70%
Tannery	25,943	0.65%	0.7%	135.7	2.62%
Ceramics	24,652	0.62%	0.0%	95.9	1.85%
Travel & Leisure	20,961	0.52%	1.8%	27.1	0.52%
Services & Real Estate	17,304	0.43%	0.0%	43.8	0.85%
IT	12,292	0.31%	-0.8%	154.8	2.99%
Jute	3,976	0.10%	-1.3%	21.0	0.41%
Paper & Printing	2,224	0.06%	0.9%	59.2	1.14%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SQRPHARMA	263.50	0.04%	262.02	0.99	16.57
UPGDCL	383.10	-0.08%	215.20	0.56	22.31
JMISMDL	460.70	-2.54%	115.35	0.25	70.37
RUNNERAUTO	96.30	6.76%	112.28	1.20	20.17
BSC	51.50	-0.39%	108.03	2.08	21.95

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
PRAGATIINS	39.30	9.78%	9.16	0.23	11.04
SALVOCHEM	17.00	9.68%	30.42	1.82	31.88
RUNNERAUTO	96.30	6.76%	112.28	1.20	20.17
VAMLBDMF1	7.30	5.80%	0.00	0.00	15.21
BGIC	25.80	4.88%	28.25	1.11	8.84

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
EASTERNINS	46.30	-7.03%	44.23	0.92	14.65
SEMILLECMF	7.50	-6.25%	0.21	0.03	6.94
1STPRIMFMF	12.20	-5.43%	35.10	2.81	12.71
SONARBAINS	39.20	-5.08%	39.50	0.99	20.00
CAPMIBBLMF	7.70	-4.94%	1.64	0.21	7.40

SHURWID

SHURWID: Agreement signed with Infosapex Ltd. to Open New Business Wing

he Company has informed that the Board of Directors has decided that the Company will open new business wing i.e. Software business, which is fully Tax exempted up to June 30, 2024 as per 6th schedule, part-A, Para-33 of the Income Tax Ordinance, 1984. In this regard, an agreement was signed with the Company and Infosapex Ltd. on June 26, 2019 and Infosapex-Shurwid JVC (Joint Venture Consortium) will do business of ICT products, branding & further development of the products that is (i) Robotic Process Automation (RPA), (ii) Paperless Meeting (Board Maestro), (iii) Business Process Automation & other software and both the company will share cost and profit equal basis.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BRACBANK	66.0	66.0	6	839,105	55.4
IPDC	27.0	27.0	1	369,000	10.0
ITC	47.7	47.7	1	25,000	1.2
MARICO	1,509.1	1,509.1	2	5,252	7.9
MERCANBANK	14.6	14.6	1	45,000	0.7
PRIMEFIN	10.2	10.2	1	5,458,330	55.7
RNSPIN	6.6	5.8	3	7,950,000	46.2
SONARBAINS	37.2	37.2	4	500,000	18.6
VFSTDL	56.0	55.0	2	42,500	2.4

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		

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 underweight	12 Months	Between +15 % and -5 %
	12 months	Less than -5 %

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