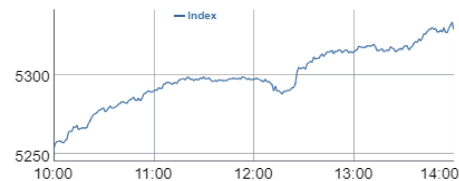


MARKET UP 75.22 POINTS

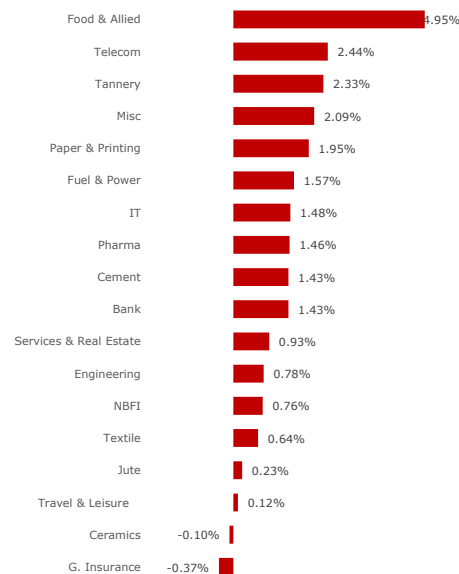
Market reverted to positive as striving investors were active to rebalance their portfolio ahead of upcoming Eid holidays and budget declaration. The market opened with positive vibe and continued the trend without any major divergence. At the end of the session, market closed at 5,328.75 points, up 1.43% from the previous session.

All the major sectors i.e. bank, telecom and pharmaceuticals grabbed investor's attention today while general insurance sector witnessed some liquidation after the recent surge. Large Cap scrips performed well today - SQRPHARMA, GP, BATBC and BRACBANK featured in top turnover list. BATBC gained 5.8% today after losing values in the last two sessions.

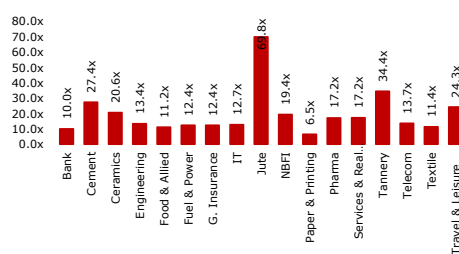
Intraday Performance of DSEX



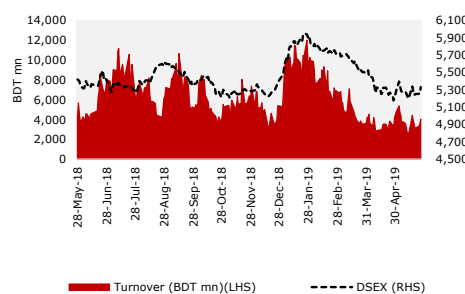
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,328.76	75.22	1.43%	5,385.64	-1.06%
DS30	1,861.37	33.07	1.81%	1,880.78	-1.03%
DSES	1,207.84	18.75	1.58%	1,232.82	-2.03%
Dow Jones IA	25,585.69	95.22	0.37%	22,878.45	11.83%
Nikkei 225	21,260.14	77.56	0.37%	20,077.62	5.89%
FTSE 100	7,302.84	25.11	0.35%	6,617.38	10.36%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,031	3,514	516.93	14.71%	4,117
Turnover (USD mn)	47.99	41.84	6.15	14.71%	49
Volume (mn)	115	120	(4.87)	-4.06%	100
Market Cap (BDT bn)	3,912	3,854	57.90	1.50%	
Market Cap (USD bn)	47	46	0.69	1.50%	
Market P/E (x)	13.40				
Particulars	Galner	Loser	Unchanged		
Market Breadth	225	70	54		

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	566,829	14.49%	1.4%	787.3	19.53%
Telecom	494,808	12.65%	2.4%	98.3	2.44%
Pharma	465,084	11.89%	1.5%	371.9	9.23%
Fuel & Power	450,033	11.51%	1.6%	316.3	7.85%
Food & Allied	302,510	7.73%	5.0%	149.4	3.71%
NBFI	179,878	4.60%	0.8%	201.5	5.00%
Engineering	148,054	3.79%	0.8%	319.2	7.92%
Misc	112,872	2.89%	2.1%	159.4	3.95%
Textile	89,034	2.28%	0.6%	212.1	5.26%
Cement	88,628	2.27%	1.4%	56.7	1.41%
G. Insurance	46,992	1.20%	-0.4%	328.7	8.15%
Tannery	25,016	0.64%	2.3%	77.1	1.91%
Ceramics	24,412	0.62%	-0.1%	91.5	2.27%
Travel & Leisure	20,272	0.52%	0.1%	6.2	0.15%
Services & Real Estate	17,004	0.43%	0.9%	12.4	0.31%
IT	12,034	0.31%	1.5%	53.0	1.31%
Jute	3,816	0.10%	0.2%	4.9	0.12%
Paper & Printing	2,307	0.06%	2.0%	4.9	0.12%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SQRPHARMA	251.90	2.48%	124.34	0.50	15.84
UPGDCL	334.10	2.96%	123.47	0.37	19.45
BRACBANK	62.90	3.28%	111.59	1.79	12.89
PREMIERBAN	12.50	0.81%	110.67	9.13	5.48
BATBC	1331.30	5.77%	106.37	0.08	9.70

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
GLOBALINS	19.80	11.86%	95.84	4.98	33.00
BATBC	1331.30	5.77%	106.37	0.08	9.70
FAREASTFIN	5.90	5.36%	1.17	0.20	n/a
JMISMDL	337.70	5.24%	60.73	0.18	51.58
SHEPHERD	36.80	5.14%	26.04	0.73	32.86

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
VAMLBDMF1	7.60	-6.17%	0.05	0.01	15.83
EASTERNINS	46.10	-5.14%	18.88	0.41	14.59
MEGCONMILK	20.60	-5.07%	0.36	0.02	n/a
SONARBAINS	46.50	-5.03%	36.86	0.78	23.72
RUPALLIFE	67.70	-3.97%	34.36	0.50	-

MERCINS

MERCINS: Buy Declaration of a Public Shareholder Director Mr. Nurul Azim Sunny, one of the Directors (Public Shareholder Director) of the Company, has expressed his intention to buy 8,62,277 shares of the Company at prevailing market price (In the Block Market) through Stock Exchange (DSE) within next 30 working days.

GLOBALINS

GLOBALINS: Dividend Declaration

The Board of Directors has recommended 5% stock dividend for the year ended on December 31, 2018. Date of AGM: 03.08.2019, Time: 11:00 AM, Venue: 'FARS Hotel & Resorts' 212, Shaheed Syed Nazrul Islam Sarani, Purana Paltan Dhaka. Record Date: 24.06.2019. The Company has also reported EPS of Tk. 0.54, NAV per share of Tk. 11.83 and NOCFPS of Tk. 1.15 for the year ended on December 31, 2018 as against Tk. 0.37, Tk. 11.86 and Tk. (0.35) respectively for the same period of the previous year.

GLOBALINS

GLOBALINS: Q1 Financials

EPS was Tk. 0.55 for January-March 2019 as against Tk. 0.41 for January-March 2018. NOCFPS was Tk. 0.46 for January-March 2019 as against Tk. 0.02 for January-March 2018. NAV per share was Tk. 12.38 as on March 31, 2019 and Tk. 12.32 as on March 31, 2018.

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
BATBC	1,269.9	1,269.9	2	200,000	254.0
BBSCABLES	90.5	90.5	1	14,811	1.3
SKTRIMS	49.7	49.7	1	25,000	1.2
SQRPHARMA	249.2	247.7	3	1,178,247	292.0

Upcoming Record Date, AGM and Spot

Ticker	Sector	AGM	Record Date	Spot Start	Spot Finish
KAY&QUE	Engineering			Compulsory Spot	
AZIZPIPES	Engineering			Compulsory Spot	
ASIAINS	G. Insurance	12-Jun-19	23-May-19	21-May-19	22-May-19
RUPALIBANK	Bank	17-Jun-19	23-May-19	21-May-19	22-May-19
PHOENIXFIN	NBFI	20-Jun-19	23-May-19	21-May-19	22-May-19
SOUTHEASTB	Bank	23-Jun-19	23-May-19	21-May-19	22-May-19
REPUBLIC	G. Insurance	27-Jun-19	23-May-19	21-May-19	22-May-19
CENTRALINS	G. Insurance	29-Jun-19	23-May-19	21-May-19	22-May-19
RUPALIINS	G. Insurance	3-Jul-19	23-May-19	21-May-19	22-May-19
IFIC	Bank	4-Jul-19	23-May-19	21-May-19	22-May-19
DHAKAINS	G. Insurance	27-Jun-19	26-May-19	22-May-19	23-May-19
ICBIBANK	Bank	11-Jul-19	26-May-19	13-May-19	23-May-19
ISLAMIINS	G. Insurance	27-Jul-19	27-May-19	23-May-19	26-May-19
EASTERNINS	G. Insurance	30-Jul-19	27-May-19	23-May-19	26-May-19
ABBANK	Bank	26-Jun-19	29-May-19	16-May-19	28-May-19
UNIONCAP	NBFI	20-Jun-19	29-May-19		
MERCANBANK	Bank	20-Jun-19	30-May-19		
MARICO	Pharma	24-Jul-19	30-May-19		
SHAHJABANK	Bank	25-Jul-19	30-May-19		
NCCBANK	Bank	30-Jul-19	30-May-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	27-May-19	23-May-19	26-May-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
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Neutral/ Hold	12 Months	Between +15 % and -5 %
Underweight	12 Months	Less than -5 %

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CONTACT US

Research Team

Rajib Kumar Das	Head of Research	rajib.das@ucb.com.bd	+ 880 1730 797 728
Anika Mafiz	Research Associate	anika.mafiz@ucb.com.bd	+ 880 1701 205 006
Md Zarif Ibne Arif	Research Associate	zarif.arif@ucb.com.bd	+ 880 1701 205 072
Md. Nazmus Sakib	Research Associate	nazmus.sakib@ucb.com.bd	+ 880 1701 205 073
Anik Mahmood Ibne Anwar	Research Associate	anik.mahmood@ucb.com.bd	+ 880 1701 205 074
Shadman Sadique Kamal	Research Associate	shadman.kamal@ucb.com.bd	+ 880 1701 205 096

Institutional and Foreign Trade Department

Sonchoy Saha, CFA	Head of Institutional Sales	sonchoy.kumer@ucb.com.bd	+ 880 1755 615 313
Tahmidur Rahman	Senior Executive Officer	tahmid@bloomberg.net	+ 880 1726 995 520
		rahman.tahmidur@ucb.com.bd	

Office Premises

Head Office	Corporate Office	DSE Extension Office	Chattogram Office
6, Dilkusha C/A, (1st Floor)	Bulus Center (Level- 2)	Room 633, 9/E DSE Annex	Ayub Trade Center
Dhaka -1000	Plot - CWS (A)-1, Road no- 34	Building (5th Floor)	1269/B SK Mujib Road (4th Floor)
Bangladesh	Gulshan Avenue, Dhaka -1212	Motijheel C/A, Dhaka 1000	Agrabad C/A, Chattogram

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