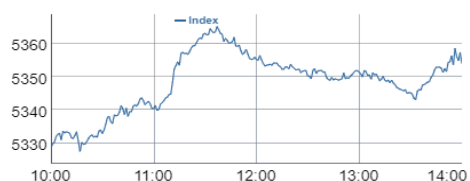


## MARKET UP 25.43 POINTS

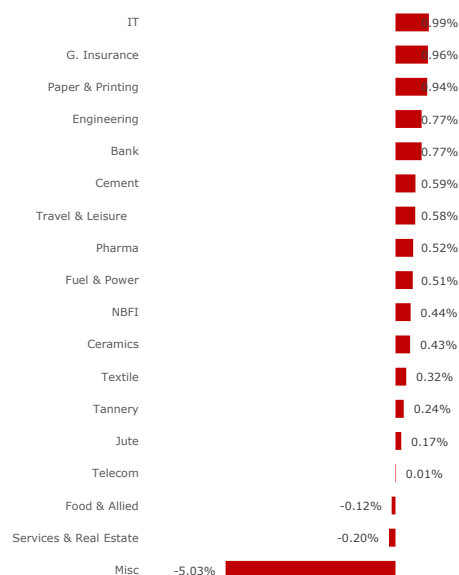
Market started the session with an upbeat vibe and continued till the end as investors continued to take position hoping upcoming budget would extend incentives to the market. Broad index, DSEX, gained 25.43 points closing the market at 5,354.20. Turnover decreased by 17.4% from last session.

Bank, Engineering and Textile sector's scrips dominated the turnover chart. BERGERPBL declared 250% Cash dividend for the year ended on March 31, 2019 - the stock shed 8.1% following the declaration. Bangladesh Shipping Corporation (DSE Ticker: BSC) has declared that the ship named M.T. Banglar Agrogati has started its commercial operation - this was the last Vessel among the six vessels that the company procured from New Yang G Shipyard Authority of China. The scrip gained 1.1% following the news.

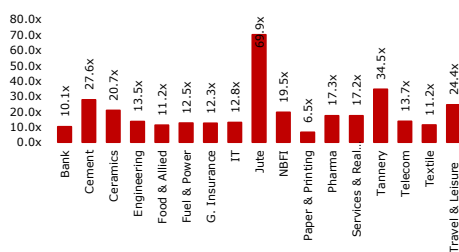
### Intraday Performance of DSEX



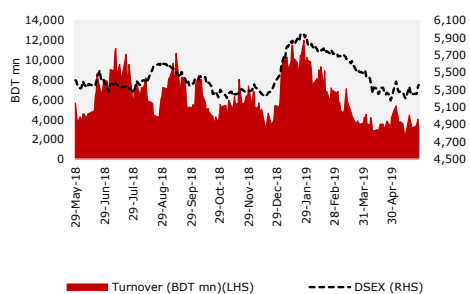
### Sector Return



### Sector P/E



### 52 Week Daily Turnover & DSEX



### Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	5,354.20	25.43	0.48%	5,385.64	-0.58%
DS30	1,868.27	6.89	0.37%	1,880.78	-0.67%
DSES	1,212.21	4.37	0.36%	1,232.82	-1.67%
Dow Jones IA	25,347.77	(237.92)	-0.93%	22,878.45	10.79%
Nikkei 225	21,003.37	(256.77)	-1.21%	20,077.62	4.61%
FTSE 100	7,194.24	(74.71)	-1.03%	6,617.38	8.72%

### Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	3,330	4,031	(701.57)	-17.40%	4,059
Turnover (USD mn)	39.64	47.99	(8.35)	-17.40%	48
Volume (mn)	102	115	(13.31)	-11.57%	99
Market Cap (BDT bn)	3,919	3,912	7.68	0.20%	
Market Cap (USD bn)	47	47	0.09	0.20%	
Market P/E (x)	13.39				
<b>Particulars</b>	<b>Winner</b>	<b>Loser</b>	<b>Unchanged</b>		
Market Breadth	174	117	56		

### Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	571,186	14.57%	0.8%	538.3	16.17%
Telecom	494,878	12.63%	0.0%	73.5	2.21%
Pharma	467,503	11.93%	0.5%	343.8	10.33%
Fuel & Power	452,313	11.54%	0.5%	279.3	8.39%
Food & Allied	302,153	7.71%	-0.1%	120.0	3.60%
NBFI	180,679	4.61%	0.4%	170.3	5.12%
Engineering	149,195	3.81%	0.8%	430.7	12.94%
Misc	107,198	2.74%	-5.0%	231.4	6.95%
Textile	89,316	2.28%	0.3%	370.5	11.13%
Cement	89,149	2.27%	0.6%	29.2	0.88%
G. Insurance	47,442	1.21%	1.0%	262.2	7.87%
Tannery	25,077	0.64%	0.2%	92.7	2.78%
Ceramics	24,517	0.63%	0.4%	60.3	1.81%
Travel & Leisure	20,390	0.52%	0.6%	6.6	0.20%
Services & Real Estate	16,971	0.43%	-0.2%	10.3	0.31%
IT	12,152	0.31%	1.0%	47.7	1.43%
Jute	3,822	0.10%	0.2%	5.8	0.17%
Paper & Printing	2,328	0.06%	0.9%	8.3	0.25%

### Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
NEWLINE	23.90	3.46%	142.85	6.18	12.19
JMISMDL	360.30	6.69%	115.68	0.33	55.04
UPGDCL	337.50	1.02%	114.79	0.34	19.65
SKTRIMS	52.00	4.42%	113.86	2.21	19.02
MERCANBANK	18.00	4.05%	95.38	5.38	7.14

### Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
PRIMEFIN	10.70	8.08%	1.94	0.18	66.88
JMISMDL	360.30	6.69%	115.68	0.33	55.04
PURABIGEN	17.80	6.59%	26.49	1.51	21.19
GLOBALINS	21.10	6.57%	50.43	2.44	9.59
VAMLBDMF1	8.00	5.26%	0.00	0.00	16.67

### Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BERGERPBL	1414.10	-8.06%	44.22	0.03	32.04
RUPALILIFE	63.50	-6.20%	49.87	0.77	-
UNITEDAIR	2.50	-3.85%	0.86	0.34	n/a
CENTRALINS	21.10	-3.65%	0.39	0.02	8.37
NATLIFEINS	203.80	-3.46%	33.53	0.16	-

### BERGERPBL

**BERGERPBL: Dividend Declaration**  
The Board of Directors has recommended 250% Cash dividend for the year ended on March 31, 2019. Date of AGM: 17.07.2019, Time of AGM: 10:00 AM, Venue of AGM: Golf Garden, Army Golf Club, Airport Road, Dhaka Cantonment, Dhaka 1206. Record Date for AGM: 25.06.2019. The Company has also reported Consolidated EPS of Tk. 44.13, Consolidated NAV per share of Tk. 176.18 and Consolidated NOCFPS of Tk. 55.09 for the year ended on March 31, 2019 as against Tk. 38.55, Tk. 142.06 and Tk. 31.66 respectively for the same period of the previous year.

### BSC

**BSC: Commercial Operation of last ship namely "M.T. Banglar Agrogati"**  
Further referring to their earlier news disseminated on 18.10.2016 regarding new vessels procurement, the Company has further informed that under the scope of the project for procurement of 6 new vessels (each having capacity of approximately 39,000 DWT), the last ship namely "M.T. Banglar Agrogati", which was built in China has already been handed over by the New Yang G Shipyard Authority of China and the said ship has already been engaged in the commercial operation.

### NBL

**NBL: Credit Rating Result**  
Emerging Credit Rating Limited (ECRL) has assigned the surveillance rating of the Company as "AA" in the long term and "ST-2" in the short term along with a Stable outlook of the Company based on audited financial statements up to December 31, 2018 and other relevant quantitative as well as qualitative information up to the date of rating.

### PREMIERBAN

**PREMIERBAN: Credit Rating Result**  
ARGUS Credit Rating Services Limited (ACRSL) has announced the rating of the Company as "AA+" for long term and "ST-1" for short term in consideration of financials of the Company up to December 31, 2018 (audited), Q1FY19 (unaudited) and other relevant quantitative as well as qualitative information up to the date of rating declaration.

### Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
AFTABAUTO	39.8	39.8	1	200,000	8.0
BRACBANK	63.1	63.0	8	1,000,000	63.1
BSC	48.5	48.5	1	14,000	0.7
ISLAMICFIN	18.0	18.0	1	100,000	1.8
KTL	21.6	21.6	1	235,000	5.1
MERCINS	26.5	26.5	1	862,277	22.9
NHFIL	43.4	43.4	1	25,000	1.1
PTL	67.3	67.0	2	200,000	13.4
RAHIMTEXT	387.0	387.0	2	20,234	7.8
VFSTDL	54.0	54.0	1	10,000	0.5

### 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	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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Expected absolute returns are calculated as the percentage of difference between our target price and latest close price. Stock recommendations are based on absolute upside (downside) and have a 12-month horizon. Please note that future price fluctuations could lead to a temporary mismatch between upside/downside for a stock and our recommendation.

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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