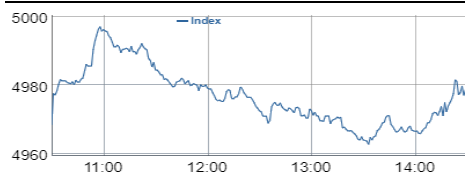


MARKET UP 7.27 POINTS

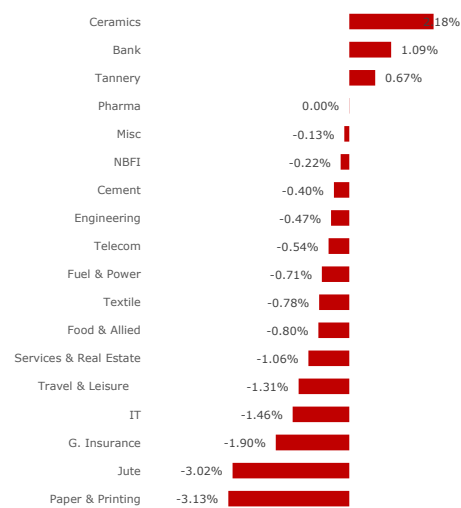
Broad index, DSEX, closed flat with a gain of 7.27 points. Turnover declined by 6.71% to BDT 3.8bn. Despite witnessing profit booking in mid-session, last hour buying pressure of large scrips namely SQRPHARMA, BRACBANK, and BSCCL led the upward movement of index. Among major sectors, Bank, Ceramics and Tannery posted positive return while General Insurance, IT and Food & Allied faced correction.

Investment Corporation Bangladesh (ICB) has sought BDT 10bn in financial support from Bangladesh Bank on an emergency basis to inject liquidity in the capital market. We are observing several initiatives from Government, Regulator and Central Bank to improve the liquidity scenario in the capital market. Hence, investors would continue to adopt wait and see approach.

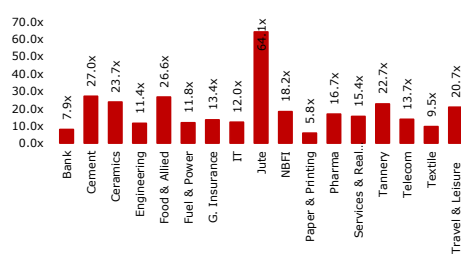
Intraday Performance of DSEX



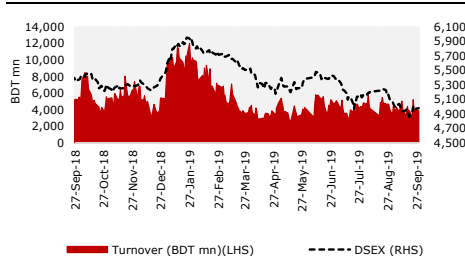
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'18 Value	YTD Δ %
DSEX	4,975.74	7.27	0.15%	5,385.64	-7.61%
DS30	1,767.98	(0.97)	-0.05%	1,880.78	-6.00%
DSES	1,149.54	1.02	0.09%	1,232.82	-6.76%
Dow Jones IA	26,820.25	(70.87)	-0.26%	22,878.45	17.23%
Nikkei 225	21,878.90	(169.34)	-0.77%	20,077.62	8.97%
FTSE 100	7,426.21	75.13	1.02%	6,617.38	12.22%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	3,841	4,117	(276.19)	-6.71%	4,205
Turnover (USD mn)	45.73	49.02	(3.29)	-6.71%	50
Volume (mn)	123	118	4.64	3.91%	128
Market Cap (BDT bn)	3,760	3,765	(5.43)	-0.14%	
Market Cap (USD bn)	45	45	(0.06)	-0.14%	
Market P/E (x)	13.01				

Particulars	Galner	Loser	Unchanged
Market Breadth	125	192	36

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	516,451	13.74%	1.1%	349.9	9.11%
Telecom	502,535	13.37%	-0.5%	168.7	4.39%
Pharma	479,289	12.75%	0.0%	333.2	8.68%
Fuel & Power	421,433	11.21%	-0.7%	215.1	5.60%
Food & Allied	264,808	7.04%	-0.8%	101.6	2.64%
NBFI	150,117	3.99%	-0.2%	135.6	3.53%
Engineering	133,604	3.55%	-0.5%	610.7	15.90%
Misc	108,421	2.88%	-0.1%	167.2	4.35%
Cement	78,404	2.09%	-0.4%	14.8	0.39%
Textile	74,622	1.98%	-0.8%	279.7	7.28%
G. Insurance	51,468	1.37%	-1.9%	624.1	16.25%
Ceramics	24,758	0.66%	2.2%	171.7	4.47%
Tannery	23,177	0.62%	0.7%	152.8	3.98%
Travel & Leisure	18,645	0.50%	-1.3%	14.1	0.37%
Services & Real Estate	15,033	0.40%	-1.1%	14.3	0.37%
IT	11,417	0.30%	-1.5%	55.7	1.45%
Jute	3,506	0.09%	-3.0%	26.5	0.69%
Paper & Printing	2,070	0.06%	-3.1%	10.9	0.28%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
BSCCL	125.00	3.31%	137.56	1.10	37.96
MONNOSTAF	1584.10	6.24%	129.75	0.08	208.43
MONNOCERA	193.80	6.84%	117.46	0.61	22.53
NLTUBES	156.80	-4.33%	112.29	0.70	n/a
SONARBAINS	36.70	1.94%	84.96	2.34	19.11

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
GHAIL	31.00	9.93%	17.24	0.56	15.00
PF1STMF	6.70	9.84%	5.89	0.91	13.67
SEMLFBSLGF	17.20	9.55%	28.90	1.78	45.26
SEMLLECMF	8.20	9.33%	37.49	4.87	14.91
SEMLIBLSF	11.00	7.84%	11.41	1.05	19.30

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ICBAMCL2ND	7.80	-6.02%	3.18	0.41	14.63
ARAMITCEM	15.00	-5.66%	0.05	0.00	n/a
IBP	19.00	-5.47%	23.83	1.24	12.61
SILVAPHL	16.50	-5.17%	7.68	0.46	12.76
ANLIMAYARN	30.20	-5.03%	3.78	0.12	55.24

ACI

ACI: Setting up a new subsidiary Company

The Company has informed that the Board of Directors of the Company has decided to set up a new Subsidiary Company in the name of ACI Marine and Riverine Technologies Limited having its authorized capital of Tk. 50.00 Crore and a paid up capital of Tk. 10.00 Crore wherein Advanced Chemical Industries Limited shall hold 77% shares at the earliest convenience subject to the approval of concern authority.

ONEBANKLTD

ONEBANKLTD: Decision for Issuance of Non-Convertible Perpetual Bond

The company has informed that the Board of Directors has decided to issue Non-Convertible Perpetual Bond (at floating rate) for Tire-I Capital subject to the approval of the concerned Regulatory Authorities. The details of the Bond are as follows: Issue Size: Tk. 400.00 crore, Tenor: Non-Convertible Perpetual Bond, Use of Proceeds: The proceeds will be treated as Capital and will help Bank grow its investment and loan portfolio.

MITHUNKNIT

MITHUNKNIT: Decision to suspend the factory operation

The Company has informed that the Board of Directors has decided to intimate the matter of suspension of operations of the factory situated at Plot no. 43-46, Sector - 04, Road - 05 in Chittagong EPZ, the operation remains suspended since September 20, 2019 and the Company will inform regarding the operation of the factory as soon as it resume.

POPULARLIF

POPULARLIF: Credit Rating Result

National Credit Ratings Limited (NCR) has announced the Surveillance entity rating of the Company as "AA+" in the long term and "ST-1" in the short term based on audited financial statements of the Company of December 31, 2018.

ANLIMAYARN

ANLIMAYARN: Credit Rating Result

National Credit Ratings Limited (NCR) has announced the surveillance entity rating of the Company as "A-" in the long term and "ST-2" in the short term along with a stable outlook based on audited financial statements of the Company as on June 30, 2018.

QUEENSOUTH

QUEENSOUTH: Credit Rating Result

ARGUS Credit Rating Services Limited (ACRSL) has rated the Company as "A" in the long term and "ST-2" in the short term along with a stable outlook based on audited financial statements of the Company up to June 30, 2018, un-audited financial statements ending March 31, 2019 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)
BANKASIA	17.9	17.9	1	958,000	17.1
BEACONPHAR	29.0	29.0	1	120,000	3.5
FEDERALINS	16.0	16.0	1	50,000	0.8
KPCL	46.5	46.5	1	100,000	4.7
ORIONINFU	60.0	60.0	1	8,800	0.5
RELIANCINS	47.3	47.3	5	2,452,199	116.0
RENATA	1,269.8	1,269.8	1	23,800	30.2
SEBL1STMF	10.5	10.5	2	400,000	4.2

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			
APEXFOOT	Tannery	12-Nov-19	13-Oct-19		
JMISMDL	Pharma	23-Nov-19	13-Oct-19		
EHL	Services & Rec	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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