

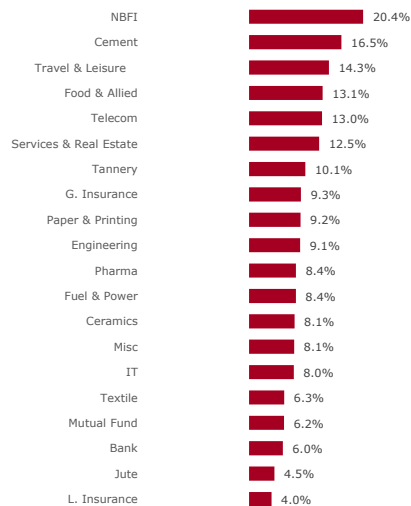
DSEX UP 364.1 POINTS

Market advanced 8.77% this week and closed at 4513.9 gaining 364.1 points. The average turnover increased by 71.6% as investors sentiment seems positive. There were a few positive developments related to the capital market. Bangladesh Bank (BB) has already submitted a set of proposals to the finance ministry, including formation of a BDT 100bn refinancing fund in line with some stockbrokers' demand to stabilise the ailing capital market. Moreover, a capital market monitoring committee of the Ministry of Finance (MoF) prepared a work-plan to consult with the government bodies and stakeholders concerned to make the capital market stable. Tax exemptions to small investors, bringing good companies in the market, strengthening the bond market etc. are a few plans that were discussed by the committee. We believe these events have boosted investors' confidence which resulted in the market upturn during the week.

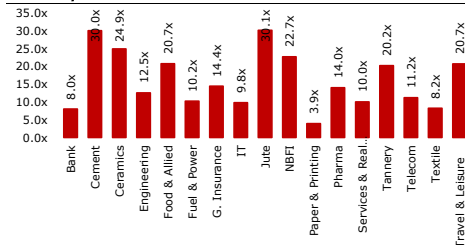
Intraweek Performance of DSEX



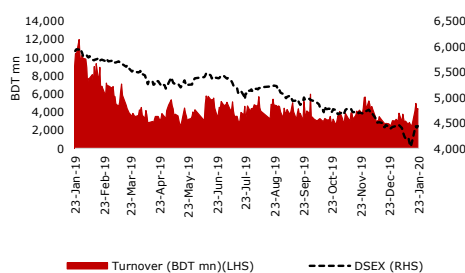
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Weekly Δ %	Dec'19 Value	YTD Δ %
DSEX	4,513.89	364.06	8.77%	4,452.93	1.37%
DS30	1,543.43	136.83	9.73%	1,513.35	1.99%
DSES	1,035.49	95.20	10.13%	999.83	3.57%
Dow Jones IA	29,186.27	(111.37)	-0.38%	28,645.26	1.89%
Nikkei 225	23,795.44	(137.69)	-0.58%	23,656.62	0.59%
FTSE 100	7,542.02	(67.79)	-0.89%	7,624.03	-1.08%

Market Statistics

Particulars	This Week	Last Week	Weekly Δ	Weekly Δ %
Avg. Turnover (BDT mn)	4,532	2,641	1,890.12	71.56%
Avg. Turnover (USD mn)	54	31	22.50	71.56%
Avg. Volume (mn)	165	102	63.42	62.45%
Market Cap (BDT bn)	3,451	3,194	256.99	8.05%
Market Cap (USD bn)	41	38	3.06	8.05%
Market P/E (x)	11.92			

Particulars	Galner	Loser
Market Breadth	326	24

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	478,852	13.9%	6.0%	416	9.18%
Cement	79,969	2.3%	16.5%	287	6.34%
Ceramics	21,848	0.6%	8.1%	67	1.48%
Engineering	131,559	3.8%	9.1%	692	15.26%
Food & Allied	238,264	6.9%	13.1%	177	3.90%
Misc	98,397	2.9%	8.1%	242	5.34%
Fuel & Power	385,541	11.2%	8.4%	310	6.83%
G. Insurance	51,234	1.5%	9.3%	395	8.71%
L. Insurance	57,194	1.7%	4.0%	58	1.29%
IT	20,456	0.6%	8.0%	201	4.44%
Jute	1,930	0.1%	4.5%	47	1.05%
Mutual Fund	31,287	0.9%	6.2%	66	1.45%
NBF1	141,308	4.1%	20.4%	120	2.65%
Paper & Printing	9,819	0.3%	9.2%	12	0.26%
Pharma	430,023	12.5%	8.4%	566	12.50%
Services & Real Estate	13,576	0.4%	12.5%	21	0.47%
Tannery	18,874	0.5%	10.1%	51	1.12%
Telecom	384,646	11.1%	13.0%	200	4.42%
Textile	90,457	2.6%	6.3%	404	8.92%
Travel & Leisure	24,442	0.7%	14.3%	68	1.50%

Top Turnover

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
LHBL	44.80	15.8%	266.65	6.27	33.27
SQRPHARMA	198.90	11.5%	209.49	1.07	11.70
SSSTEEL	13.50	-15.6%	135.83	9.82	4.27
KPCL	53.60	6.6%	128.05	2.43	12.07
GP	272.00	12.3%	124.82	0.46	10.88

Top Gainers

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ICB	90.30	41.1%	16.13	0.18	n/a
SAMATALETH	164.80	31.9%	3.07	0.02	824.00
SEAPEARL	58.00	31.8%	56.14	1.07	107.41
BSCCL	105.30	31.1%	75.34	0.78	25.31
GEMINISEA	174.60	29.5%	4.20	0.03	89.08

Top Losers

Ticker	Close Price (BDT)	Weekly Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SSSTEEL	13.50	-15.6%	135.83	9.82	4.27
MHSMML	9.30	-13.9%	6.14	0.60	n/a
STANCERAM	578.40	-10.4%	37.39	0.06	n/a
SILCOPHL	26.00	-9.1%	37.57	1.35	20.97
TOSRIFA	12.00	-7.7%	1.10	0.09	n/a

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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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CONTACT US

Research Team

Rajib Kumar Das	Head of Research	rajib.das@ucb.com.bd	+ 880 1730 797 728
Md. Sakib Chowdhury, CFA	Deputy Head of Research	sakib.chowdhury@ucb.com.bd	+ 880 1713 205 698
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
Md. Asif Muntasir Shakkhor	Research Associate	asif.muntasir@ucb.com.bd	+ 880 1713 205 696

Investment Strategist

Syed Adnan Huda, CFA	Vice President	adnan.huda@ucb.com.bd	+ 880 1730 325 232
Md. Hasib Reza, CFA	Assistant Vice President	hasib.reza@ucb.com.bd	+ 880 1755 658 997

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 rahman.tahmidur@ucb.com.bd	+ 880 1726 995 520

Office Premises

Head Office

6, Dilkusha C/A, (1st Floor)
Dhaka -1000
Bangladesh

Corporate Office

Bulus Center (Level- 2)
Plot - CWS (A)-1, Road no- 34
Gulshan Avenue, Dhaka -1212

DSE Extension Office

Room 633, 9/E DSE Annex
Building (5th Floor)
Motijheel C/A, Dhaka 1000

Extension of Main Office

NIK Tower
55 Dilkusha C/A
(4th Floor), Dhaka-1000.

Chattogram Office

Ayub Trade Center
1269/B SK Mujib Road (4th Floor)
Agrabad C/A, Chattogram

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