

Daily Market Update

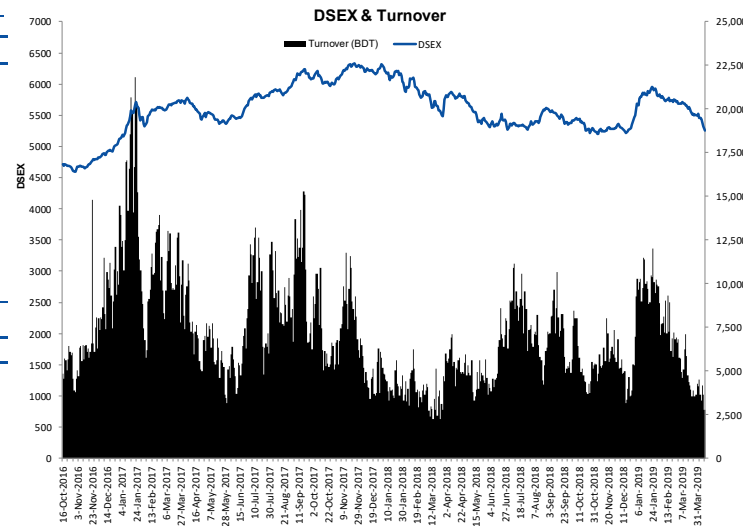
Market closed in red today. The benchmark index DSEX (-1.07%) lost 57.15 points and closed at 5,261.60 points today. The blue chip index DS30 (-1.19%) and the shariah based index DSES (-1.23%) both closed in red. All the large cap sectors showed negative performance today except NBFIs (+0.43%). Food & Allied posted the highest loss of 3.66% followed by Pharmaceuticals (-1.45%), Telecommunication (-1.26%), Banks (-0.94%), Power (-0.77%), and Engineering (-0.71%). Turnover stood at BDT 2.7 billion (USD 33.1 million). Grameenphone Ltd. (-1.2%) was the most traded share with a turnover of BDT 175.7 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,417.44	1,430.87	-13.43	-0.94%	30	578,535.3	17.14%	240.9	9.10%
NBFIs	1,966.64	1,958.18	8.46	0.43%	23	180,434.3	5.35%	92.3	3.49%
Mutual Funds	639.22	641.99	-2.76	-0.43%	38	34,167.9	1.01%	17.1	0.65%
General Insurance	1,689.94	1,699.62	-9.67	-0.57%	35	45,775.1	1.36%	118.1	4.46%
Life Insurance	1,898.18	1,892.81	5.37	0.28%	12	52,924.1	1.57%	26.3	1.00%
Telecommunication	5,056.01	5,120.70	-64.69	-1.26%	2	508,163.8	15.06%	239.1	9.03%
Pharmaceuticals	2,748.70	2,789.03	-40.33	-1.45%	31	518,891.2	15.38%	353.9	13.36%
Fuel & Power	1,839.88	1,854.12	-14.25	-0.77%	20	456,102.7	13.52%	277.9	10.49%
Cement	1,570.15	1,635.79	-65.63	-4.01%	7	95,487.0	2.83%	55.0	2.08%
Services & Real Estate	952.71	954.56	-1.85	-0.19%	8	37,327.5	1.11%	22.2	0.84%
Engineering	2,856.77	2,877.23	-20.46	-0.71%	37	185,483.1	5.50%	387.6	14.64%
Food & Allied	18,156.52	18,845.78	-689.26	-3.66%	17	334,150.1	9.90%	149.1	5.63%
IT	1,615.81	1,640.97	-25.16	-1.53%	9	17,864.7	0.53%	34.9	1.32%
Textiles	1,348.01	1,369.48	-21.47	-1.57%	54	130,734.3	3.87%	258.3	9.75%
Paper & Printing	7,000.60	7,085.70	-85.09	-1.20%	3	13,384.5	0.40%	7.6	0.29%
Tannery	2,565.51	2,572.27	-6.76	-0.26%	6	27,626.2	0.82%	153.7	5.80%
Jute	18,121.33	18,172.27	-50.95	-0.28%	3	4,004.9	0.12%	9.3	0.35%
Ceramics	576.70	566.84	9.86	1.74%	5	27,854.3	0.83%	136.9	5.17%
Miscellaneous	2,267.45	2,293.86	-26.41	-1.15%	13	125,813.5	3.73%	67.8	2.56%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Rupali Life Insurance Co. Ltd.	86.40	7.6%	10.5
Dulamia Cotton	53.30	7.5%	3.5
Monno Ceramic	330.20	6.4%	130.7
Tallu Spinning	5.60	5.7%	.3
Fine Foods Ltd	38.80	4.6%	8.0
Samata Leather	74.40	4.5%	7.6
Alltex Ind. Ltd.	13.40	3.9%	4.7
Islami Insurance	20.30	3.6%	2.7
Standard Ceramic	149.70	3.4%	2.4
Shinepukur Ceramics	13.50	3.1%	.2

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Heidelberg Cement	294.40	-16.5%	27.0
Savar Refractories	92.30	-9.5%	.4
R.N. Spinning Mills Limited	5.80	-9.4%	6.7
Zeal Bangla Sugar Mills	37.20	-7.0%	.0
Progressive Life Ins	80.40	-6.5%	.3
Dutch-Bangla Bank	81.80	-6.1%	15.8
Takaful Insurance	26.30	-6.1%	2.1
Glaxo Smithkline	1,426.80	-5.9%	6.8
Esquire Knit Composite Limited	43.30	-5.7%	63.4
Eastern Cables	333.60	-5.3%	74.3

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Grameenphone Ltd.	357.60	-1.2%	175.7
Monno Ceramic	330.20	6.4%	130.7
Fortune Shoes Limited	35.90	2.9%	97.0
Reckitt Benckiser	3,400.60	-5.0%	91.1
United Power Generation & Distribution Company Ltd	336.50	-1.1%	90.2
BATBC	1,508.70	-3.9%	85.4
Eastern Cables	333.60	-5.3%	74.3
Esquire Knit Composite Limited	43.30	-5.7%	63.4
Bangladesh Submarine Cable Company Limited	153.40	-2.2%	63.4
Monno Jute Staffers	1,438.80	-2.6%	62.5



Associate:
Md. Rafiqul Islam
 (880)1708805229
mrfaqulislam@bracepl.com

Associate:
Md. Mahirul Quddus
 (880)1709636546
mmahirul.quddus@bracepl.com

Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	5,261.60	5,318.75	-57.15	-1.07%	-2.30%
DS30	1,877.92	1,900.54	-22.61	-1.19%	-0.15%
DSES	1,217.86	1,233.00	-15.13	-1.23%	-1.21%

	Advanced	Declined	Unchanged	Total
All Category	64	231	53	348
A Category (Equity)	45	186	40	271
B Category (Equity)	8	21	4	33
N Category (Equity)	0	4	0	4
Z Category (Equity)	11	20	9	40
Mutual Funds	5	14	17	36
Corporate Bonds	1	0	0	1

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,928,958.4	3,973,293.1	-1.1%
	Mn USD	47,262.8	47,796.1	
Turnover	Mn BDT	2,748.4	3,659.2	-24.9%
	Mn USD	33.1	44.0	
Volume	Mn Shares	64.0	76.5	-16.3%
Trade		96,467	127,164	-24.1%

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
ISLAMICFIN	Islamic Finance & Investment Ltd.		4.5%	10.0%	31-Dec-2018	11-Apr-2019
BRACBANK	BRAC Bank Ltd.		15.0%	0.0%	31-Dec-2018	11-Apr-2019
GSPFINANCE	GSP Finance Company (Bangladesh) Limited		0.0%	18.0%	31-Dec-2018	15-Apr-2019
BANKASIA	Bank Asia Ltd.		5.0%	5.0%	31-Dec-2018	15-Apr-2019

Important DSE News
MONNOSTAF

Monno Welfare Foundation, one of the Corporate Directors of the Company, has expressed its intention to sell 50,000 shares out of its total holding of 5,36,714 shares of the Company at prevailing market price (in the Block Market) through Stock Exchange (DSE) within April 30, 2019.

RNSPIN

The Company has informed that a massive fire incident has occurred at 9:30 PM on April 08, 2019 at the factory of the Company at Comilla EPZ.

PUBALIBANK

The Board of Directors has recommended 10% cash and 3% stock Dividend for the year ended on December 31, 2018. Date of AGM: 19.05.2019, Time: 10:30 AM, Venue: Pubali Bank Auditorium, Head Office, 26 Dilkusha C/A, Dhaka-1000. Record Date: 02.05.2019. The Company has also reported Consolidated EPS of Tk. 3.63, Consolidated NAV per share of Tk. 27.25 and Consolidated NOCFPS of Tk. 3.59 for the year ended on December 31, 2018 as against Tk. 0.06 (restated), Tk. 25.29 and Tk. 1.57 respectively for the same period of the previous year.

HEIDELBCEM

EPS was Tk. 3.42 for January-March, 2019 as against Tk. 5.34 for January-March, 2018; NOCFPS was Tk. 5.55 for January-March, 2019 as against Tk. 31.80 for January-March, 2018. NAV per share was Tk. 84.22 as on March 31, 2019 and Tk. 82.68 as on December 31, 2018. It is to be further noted that NAV per share increased due to more capital expenditure and increase in inventory compared to the end of December 2018. EPS declined by 36.06% due to higher cost of goods sold and administrative expenses and lower financial income, NOCFPS decreased for lower sales collection, increase of supplier payment and more advance tax payment in import stage compared to the same period of 2018.

The Board of Directors has recommended 75% cash dividend for the year ended on December 31, 2018. Date of AGM: 22.05.2019, Time: 11:00 AM, Venue: Factory Office, Tatki Jatramora, Tarabow, Rupgonj, Narayangonj. Record date: 06.05.2019. The Company has also reported EPS of Tk. 14.33, NAV per share of Tk. 82.68 and NOCFPS of Tk. 11.32 for the year ended on December 31, 2018 as against Tk. 14.21, Tk. 83.17 and Tk. 14.09 respectively for the same period of the previous year.