

## Daily Market Update

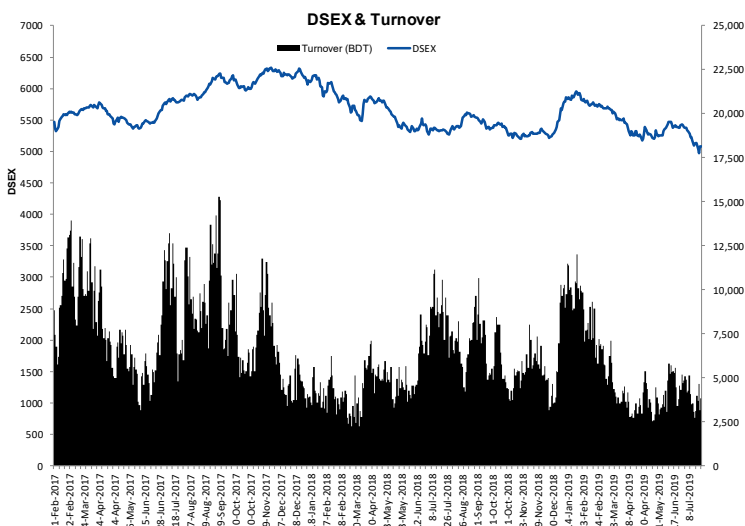
Market closed in red today. The benchmark index DSEX (-0.01%) lost 0.46 points and closed at 5,077.29 points today. The blue chip index DS30 (+0.11%) closed in green and the shariah based index DSES (-0.34%) closed in red. The large cap sectors showed mixed performance today. Power posted the highest gain of 0.32% followed by NBFIs (+0.23%) and Banks (+0.22%). Telecommunication experienced the highest loss of 0.60% followed by Engineering (-0.54%), Food & Allied (-0.29%), and Pharmaceuticals (-0.06%). Turnover stood at BDT 3.8 billion (USD 45.8 million). Square Pharmaceuticals (-0.3%) was the most traded share with a turnover of BDT 146.0 million.

Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,419.35	1,416.16	3.19	0.22%	30	579,315.0	17.90%	221.4	5.85%
NBFIs	1,806.90	1,802.79	4.12	0.23%	23	167,045.5	5.16%	96.5	2.55%
Mutual Funds	850.68	812.31	38.37	4.72%	37	44,206.2	1.37%	610.6	16.13%
General Insurance	1,921.23	1,910.36	10.87	0.57%	35	52,040.6	1.61%	429.4	11.34%
Life Insurance	2,287.88	2,280.85	7.03	0.31%	12	63,789.5	1.97%	118.8	3.14%
Telecommunication	4,489.45	4,516.40	-26.95	-0.60%	2	451,221.0	13.94%	128.8	3.40%
Pharmaceuticals	2,690.77	2,692.31	-1.54	-0.06%	32	507,490.2	15.68%	540.1	14.27%
Fuel & Power	1,878.01	1,872.08	5.93	0.32%	20	465,556.1	14.39%	286.8	7.57%
Cement	1,355.44	1,371.09	-15.65	-1.14%	7	82,430.7	2.55%	33.8	0.89%
Services & Real Estate	986.82	992.49	-5.68	-0.57%	8	38,663.9	1.19%	98.0	2.59%
Engineering	2,811.52	2,826.77	-15.24	-0.54%	38	182,545.8	5.64%	253.1	6.68%
Food & Allied	15,710.94	15,757.25	-46.31	-0.29%	17	289,140.8	8.93%	75.2	1.99%
IT	1,676.00	1,695.57	-19.57	-1.15%	9	18,530.2	0.57%	48.8	1.29%
Textiles	1,281.02	1,292.87	-11.85	-0.92%	55	124,236.9	3.84%	301.9	7.98%
Paper & Printing	6,775.05	6,863.66	-88.61	-1.29%	3	12,953.3	0.40%	17.3	0.46%
Tannery	2,408.82	2,417.35	-8.54	-0.35%	6	25,938.9	0.80%	149.4	3.95%
Jute	15,215.23	14,508.96	706.27	4.87%	3	3,362.6	0.10%	13.3	0.35%
Ceramics	438.26	444.73	-6.47	-1.45%	5	21,167.8	0.65%	65.7	1.74%
Miscellaneous	1,923.98	1,924.57	-0.59	-0.03%	13	106,755.7	3.30%	297.2	7.85%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
C & A Textiles Limited	2.20	10.0%	.8
International Leasing	6.60	10.0%	12.2
ICB AMCL Third NRB Mutual Fund	6.70	9.8%	11.7
SEML FBLSL Growth Fund	40.40	9.8%	4.3
SEML IBBL Shariah Fund	14.80	9.6%	.8
CAPM IBBL Islamic Mutual Fund	11.40	9.6%	47.2
SEML Lecture Equity Management Fund	11.40	9.6%	38.9
PHP First Mutual Fund	5.70	9.6%	25.5
CAPM BDBL Mutual Fund 01	10.40	9.5%	13.5
First Janata Bank Mutual Fund	5.80	9.4%	17.4

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Heidelberg Cement	204.00	-8.6%	10.7
Vanguard AML BD Finance Mutual Fund One	9.30	-7.9%	11.6
Vanguard AML Rupali Bank Balanced Fund	10.20	-7.3%	11.7
Delta Spinnings Ltd.	4.40	-6.4%	1.1
M.I. Cement Factory Limited	56.80	-6.3%	.2
United Airways (BD) Ltd.	1.50	-6.3%	2.3
Dacca Dyeing	3.00	-6.3%	.1
Al-Haj Textile	47.90	-5.5%	13.1
Desh Garments	151.50	-4.5%	.9
Meghna Pet Industries	9.00	-4.3%	.1

Most Traded Share	Close	Δ%	Turnover (mn BDT)
Square Pharmaceuticals	250.00	-0.3%	146.0
Bangladesh Shipping Corporation	52.10	5.3%	145.7
United Power Generation & Distribution Company Ltd	379.40	0.5%	121.3
Fortune Shoes Limited	38.90	-0.3%	118.3
Beacon Pharmaceuticals Limited	22.40	5.2%	96.8
National Life Insurance Company Ltd.	266.60	-0.5%	73.5
Rupali Insurance	25.10	4.6%	69.2
Asian Tiger Sandhani Life Growth Fund	13.10	3.1%	68.3
Grameenphone Ltd.	320.40	-0.9%	67.8
Sea Pearl Beach Resort & Spa Limited	37.90	1.9%	67.2



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Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	5,077.29	5,077.75	-0.46	-0.01%	-5.73%
DS30	1,816.70	1,814.62	2.08	0.11%	-3.41%
DSES	1,160.82	1,164.72	-3.90	-0.34%	-5.84%

	Advanced	Declined	Unchanged	Total
All Category	143	178	32	353
A Category (Equity)	112	136	20	268
B Category (Equity)	11	21	6	38
N Category (Equity)	4	4	0	8
Z Category (Equity)	16	17	6	39
Mutual Funds	32	5	0	37
Corporate Bonds	1	0	0	1

Market Stat	Today	Last Day	% Change	
Mcap	Mn BDT	3,794,989.5	3,792,424.0	
	Mn USD	45,651.3	45,620.4	0.1%
Turnover	Mn BDT	3,806.0	3,170.7	
	Mn USD	45.8	38.1	20.0%
Volume	Mn Shares	167.7	127.7	31.3%
Trade		116,107	105,153	10.4%

**Important DSE News****ALLTEX**

With reference to their earlier news disseminated by DSE on 25.06.2019 regarding decision to Lay off the Factory for 30 days, the Company has further informed that with no improvement in the sale of manufacturing yarn, the authorities have extended their announced lay off period for next 15 days, from July 25 to August 08, 2019.

**FIRSTSBANK**

(Q2 Un-audited): Consolidated EPS was Tk. 0.41 for April-June 2019 as against Tk. 0.05 for April-June 2018; Consolidated EPS was Tk. 0.95 for January-June 2019 as against Tk. 0.42 for January-June 2018. Consolidated NOCFPS was Tk. (2.76) for January-June 2019 as against Tk. (0.30) for January-June 2018. Consolidated NAV per share was Tk. 16.42 as on June 30, 2019 and Tk. 14.06 as on June 30, 2018.

**RUPALIBANK**

(Q2 Un-audited): Consolidated EPS was Tk. 0.03 for April-June 2019 as against Tk. 0.14 for April-June 2018.

(Q2 Un-audited): Consolidated EPS was Tk. 0.28 for January-June 2019 as against Tk. 0.35 for January-June 2018. Consolidated NOCFPS was Tk. (98.26) for January-June 2019 as against Tk. 29.88 for January-June 2018. Consolidated NAV per share was Tk. 45.98 as on June 30, 2019 and Tk. 45.73 as on December 31, 2018.

**ISLAMICFIN**

(Q2 Un-audited): EPS was Tk. 0.30 for April-June 2019 as against Tk. 0.29 for April-June 2018; EPS was Tk. 0.66 for January-June 2019 as against Tk. 0.58 for January-June 2018. NOCFPS was Tk. (6.80) for January-June 2019 as against Tk. 3.30 for January-June 2018. NAV per share was Tk. 13.72 as on June 30, 2019 and Tk. 12.86 as of June 30, 2018.

**UTTARABANK**

(Q2 Un-audited): Consolidated EPS was Tk. 1.58 for April-June 2019 as against Tk. 0.98 for April-June 2018; Consolidated EPS was Tk. 2.50 for January-June 2019 as against Tk. 1.35 for January-June 2018. Consolidated NOCFPS was Tk. (13.57) for January-June 2019 as against Tk. 7.97 for January-June 2018. Consolidated NAV per share was Tk. 34.64 as on June 30, 2019 and Tk. 34.29 as on June 30, 2018. The Company also informed that Net Operating Cash Flow Per Share (NOCFPS) has been decreased in the current period mainly due to increase of cash payment to employees, income tax paid and decrease of deposits from customers and other assets and other liabilities etc. compared to the previous corresponding period.

**MERCINS**

(Q2 Un-audited): EPS was Tk. 0.18 for April-June 2019 as against Tk. 0.33 for April-June 2018; EPS was Tk. 0.80 for January-June 2019 as against Tk. 1.01 for January-June 2018. NOCFPS was Tk. 0.52 for January-June 2019 as against Tk. 0.82 for January-June 2018. NAV per share was Tk. 18.06 as on June 30, 2019 and Tk. 17.93 as on December 31, 2018.

**LRGLOBMF1**

(Q3 Un-audited): EPU was Tk. (0.14) for April-June 2019 as against Tk. 0.19 for April-June 2018; EPU was Tk. 0.04 for October 2018-June 2019 as against Tk. 0.25 for October 2017-June 2018. NOCFPU was Tk. 0.22 for October 2018-June 2019 as against Tk. 0.22 for October 2017-June

2018. NAV per unit at market price was Tk. 11.01 as on June 30, 2019 and Tk. 11.09 as on September 30, 2018. NAV per unit at cost price was Tk. 10.08 as on June 30, 2019 and Tk. 10.59 as on September 30, 2018.

**VAMLBDMF1**

(Q3 Un-audited): EPU was Tk. (0.15) for April-June 2019 as against Tk. (0.16) for April-June 2018; EPU was Tk. 0.09 for October 2018-June 2019 as against Tk. 0.43 for October 2017-June 2018. NOCFPU was Tk. 0.13 for October 2018-June 2019 as against Tk. 0.06 for October 2017-June 2018. NAV per unit at market price was Tk. 10.45 as on June 30, 2019 and Tk. 10.86 as on September 30, 2018. NAV per unit at cost price was Tk. 10.83 as on June 30, 2019 and Tk. 11.04 as on September 30, 2018.

**HEIDELBCEM**

(Q2 Un-audited): Consolidated EPS was Tk. (0.72) for April-June 2019 as against Tk. 4.21 for April-June 2018; Consolidated EPS was Tk. 2.69 for January-June 2019 as against Tk. 9.55 for January-June 2018. Consolidated NOCFPS was Tk. 5.78 for January-June 2019 as against Tk. 10.81 for January-June 2018. Consolidated NAV per share was Tk. 77.87 as on June 30, 2019 and Tk. 82.68 as on December 31, 2018. It is to be noted that compare to same period of previous year, NAV per share reduced due to charging of regular depreciation and decrease of inventory. EPS declined by Tk. 6.86 due to higher cost of goods sold and lower financial income. NOCFPS decrease for lower sales collection, increase of supplier payment and more advance tax payment in import stage.

**UNIQUEHRL**

With reference to their earlier news disseminated by DSE on 27.06.2018 regarding receipt of Letter of Intent (LOI) for the development of Gas/R-LNG based Combined Cycle Power Generation Facility of 584 MW (Net) capacity at Meghnaghat, Narayanganj, on Build-Own-Operate (BOO) basis under Private Sector Power Generation Policy of Bangladesh. The Company has further informed that the Project Company 'Unique Meghnaghat Power Limited' has to sign (i) the Implement Agreement (IA) with the GOB & PGCB, (ii) the Power Purchase Agreement (PPA) with BPDB and (iii) the Gas Supply Agreement (GSA) with the concerned Gas Supplier (Collectively, the 'Project Agreements'). The said Project Agreement signing ceremony of Unique Meghnaghat Power Limited scheduled to be held on July 24, 2019 where Unique Hotel & Resorts Limited owned 65.01% share of the Company.