

Daily Market Update

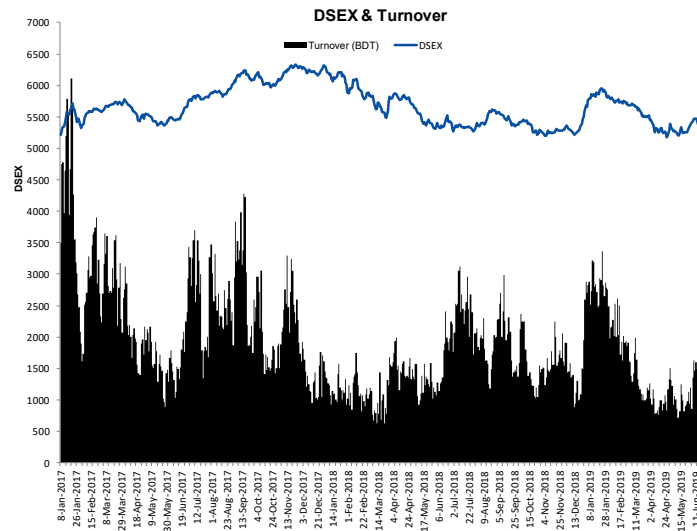
Market closed in red today. The benchmark index DSEX (-0.16%) lost 8.42 points and closed at 5,421.62 points today. The blue chip index DS30 (+0.22%) closed in green while the shariah based index DSES (-0.09%) closed in red. Large cap sectors showed mixed performance today. Food & Allied booked the highest gain of 0.83% followed by Pharmaceuticals (+0.55%) and Engineering (+0.24%). Power experienced the highest loss of 0.73% followed by NBFIs (-0.62%), Banks (-0.47%) and Telecommunication (-0.35%). Turnover stood at BDT 4.7 billion (USD 56.5 million). Bangladesh Submarine Cable Company Limited(-5.6%) was the most traded share with a turnover of BDT 225.0 million.

| Sector Index | Closing | Opening | Δ(Pts) | Δ% | No. of Cos | Sectoral Mcap | % of Total Mcap | Sectoral Turnover | % of Total Turnover |
|------------------------|-----------|-----------|--------|--------|------------|---------------|-----------------|-------------------|---------------------|
| Banks | 1,475.90 | 1,482.81 | -6.91 | -0.47% | 30 | 602,397.2 | 17.49% | 267.4 | 5.79% |
| NBFIs | 2,001.36 | 2,013.75 | -12.39 | -0.62% | 23 | 185,022.9 | 5.37% | 159.8 | 3.46% |
| Mutual Funds | 685.00 | 682.12 | 2.88 | 0.42% | 38 | 35,595.8 | 1.03% | 34.3 | 0.74% |
| General Insurance | 1,860.98 | 1,920.21 | -59.23 | -3.08% | 35 | 50,408.7 | 1.46% | 300.4 | 6.51% |
| Life Insurance | 2,123.21 | 2,162.32 | -39.11 | -1.81% | 12 | 59,198.1 | 1.72% | 120.8 | 2.62% |
| Telecommunication | 5,116.28 | 5,134.46 | -18.17 | -0.35% | 2 | 514,221.9 | 14.93% | 258.2 | 5.59% |
| Pharmaceuticals | 2,803.46 | 2,788.06 | 15.40 | 0.55% | 32 | 528,744.3 | 15.35% | 579.6 | 12.55% |
| Fuel & Power | 1,936.44 | 1,950.62 | -14.17 | -0.73% | 20 | 480,041.0 | 13.94% | 376.0 | 8.14% |
| Cement | 1,487.82 | 1,486.79 | 1.03 | 0.07% | 7 | 90,481.4 | 2.63% | 42.4 | 0.92% |
| Services & Real Estate | 992.44 | 988.43 | 4.01 | 0.41% | 8 | 38,884.1 | 1.13% | 93.4 | 2.02% |
| Engineering | 3,105.94 | 3,098.56 | 7.37 | 0.24% | 38 | 201,661.3 | 5.85% | 760.1 | 16.46% |
| Food & Allied | 17,082.58 | 16,942.79 | 139.80 | 0.83% | 17 | 314,384.2 | 9.13% | 157.8 | 3.42% |
| IT | 1,858.93 | 1,855.03 | 3.90 | 0.21% | 9 | 20,552.7 | 0.60% | 153.5 | 3.33% |
| Textiles | 1,445.04 | 1,438.16 | 6.89 | 0.48% | 55 | 140,144.1 | 4.07% | 818.7 | 17.73% |
| Paper & Printing | 7,564.82 | 7,626.39 | -61.57 | -0.81% | 3 | 14,463.2 | 0.42% | 65.4 | 1.42% |
| Tannery | 2,459.67 | 2,486.16 | -26.48 | -1.07% | 6 | 26,486.6 | 0.77% | 88.4 | 1.91% |
| Jute | 18,071.44 | 17,989.30 | 82.14 | 0.46% | 3 | 3,993.9 | 0.12% | 10.8 | 0.23% |
| Ceramics | 518.01 | 519.17 | -1.17 | -0.22% | 5 | 25,019.3 | 0.73% | 93.5 | 2.03% |
| Miscellaneous | 2,033.36 | 2,051.94 | -18.57 | -0.91% | 13 | 112,824.7 | 3.28% | 236.2 | 5.12% |

| Top Ten Gainers | Close | Δ% | Turnover (mn BDT) |
|-------------------------------------|-------|-------|-------------------|
| H.R. Textile | 50.80 | 10.0% | 60.8 |
| Prime Finance First MF | 13.40 | 9.8% | 11.2 |
| SEML Lecture Equity Management Fund | 8.00 | 6.7% | 3.0 |
| The ACME Laboratories Limited | 77.00 | 4.8% | 17.6 |
| Alif Manufacturing Company Ltd. | 10.40 | 4.0% | 42.8 |
| Prime Textile | 34.40 | 3.9% | 39.7 |
| Premier Cement Mills Limited | 72.60 | 3.9% | .2 |
| SEML FBLSL Growth Fund | 10.80 | 3.8% | .0 |
| Aamra Technologies Limited | 26.60 | 3.5% | 2.7 |
| Saiham Textile | 47.00 | 3.1% | .9 |

| Top Ten Losers | Close | Δ% | Turnover (mn BDT) |
|---|-------|--------|-------------------|
| First Finance Limited | 6.00 | -11.8% | .7 |
| Peoples Leasing | 4.10 | -10.9% | 3.1 |
| Vanguard AML BD Finance Mutual Fund One | 6.70 | -8.2% | .4 |
| International Leasing | 10.20 | -7.3% | 15.7 |
| Purabi Gen. Insurance Company Ltd. | 15.60 | -7.1% | 12.9 |
| Peoples Insurance | 20.70 | -6.8% | 7.4 |
| Northern Insurance | 22.20 | -6.3% | 13.9 |
| Republic Insurance | 24.20 | -5.8% | 9.6 |
| Federal Insurance | 13.30 | -5.7% | 18.6 |
| Janata Insurance | 16.70 | -5.6% | 5.9 |

| Most Traded Share | Close | Δ% | Turnover (mn BDT) |
|--|--------|-------|-------------------|
| Bangladesh Submarine Cable Company Limited | 132.00 | -5.6% | 225.0 |
| Square Pharmaceuticals | 264.30 | 0.3% | 163.8 |
| United Power Generation & Distribution Company Ltd | 375.10 | -2.1% | 159.3 |
| Singer Bangladesh | 193.20 | 0.6% | 155.9 |
| National Polymer | 110.10 | 2.7% | 152.3 |
| Runner Automobiles Limited | 96.30 | 0.0% | 112.4 |
| BBS Cables Limited | 100.50 | 0.4% | 78.1 |
| Kattali Textile Limited | 22.50 | 0.9% | 77.6 |
| Genex Infosys Limited | 55.90 | 0.7% | 76.1 |
| Monno Ceramic | 202.90 | -2.5% | 74.8 |



| Index | Closing | Opening | Δ(Pts) | Δ% | %ΔYTD |
|-------|----------|----------|--------|--------|-------|
| DSEX | 5,421.62 | 5,430.05 | -8.42 | -0.16% | 0.67% |
| DS30 | 1,929.09 | 1,924.91 | 4.19 | 0.22% | 2.57% |
| DSES | 1,244.69 | 1,245.83 | -1.14 | -0.09% | 0.96% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 122 | 175 | 56 | 353 |
| A Category (Equity) | 102 | 138 | 30 | 270 |
| B Category (Equity) | 8 | 16 | 12 | 36 |
| N Category (Equity) | 3 | 3 | 1 | 7 |
| Z Category (Equity) | 9 | 18 | 13 | 40 |
| Mutual Funds | 17 | 8 | 12 | 37 |
| Corporate Bonds | 1 | 0 | 0 | 1 |

| Market Stat | Today | Last Day | % Change | |
|-------------|-----------|-------------|-------------|--------|
| Mcap | Mn BDT | 3,998,163.8 | 4,004,578.2 | -0.2% |
| | Mn USD | 48,095.3 | 48,172.5 | |
| Turnover | Mn BDT | 4,697.5 | 5,173.5 | -9.2% |
| | Mn USD | 56.5 | 62.2 | |
| Volume | Mn Shares | 129.3 | 149.0 | -13.2% |
| Trade | | 125,561 | 124,589 | 0.8% |

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Important DSE News**CITYGENINS**

The Company will be placed in 'B' category from existing 'A' category with effect from July 02, 2019 as the Company has approved 5% cash dividend for the year ended on December 31, 2018.

PLFSL

(Q1 Un-audited): The Company further informed that NAV per share was Tk. (65.59) as on December 31, 2018 instead of Tk. (65.59) as on March 31, 2018.

The Board of Directors has recommended No dividend for the year ended on December 31, 2018. Date of AGM: 17.09.2019, Time: 9:30 AM, Venue: RAOVA Convention Center (Anchor Hall), 3rd Floor, Mohakhali, Dhaka. Record Date: 05.08.2019. The Company has also reported Consolidated EPS of Tk. (5.52), Consolidated NAV per share of Tk. (65.59) and Consolidated NOCFPS of Tk. (3.69) for the year ended on December 31, 2018 as against Tk. (26.68), Tk. (60.07) and Tk. 5.76 respectively for the same period of the previous year.

FIRSTFIN

(Q1 Un-audited): EPS was Tk. (0.71) for January-March 2019 as against Tk. (1.70) for January-March 2018. NOCFPS was Tk. (8.71) for January-March 2019 as against Tk. 2.39 for January-March 2018. NAV per share was Tk. 6.68 as on March 31, 2019 and Tk. 7.39 as on December 31, 2018.

PRIMELIFE

(Q1 Un-audited): Decrease in life revenue account for Jan-Mar, 2019 was Tk. 451.88 million with total life insurance fund of Tk. 8,358.00 million as against decrease of Tk. 405.37 million and Tk. 8,061.22 million respectively for the same period of the previous year.

DELTALIFE

(Q1 Un-audited): Increase in consolidated life revenue account for Jan-March, 2019 was Tk. 51.83 million with consolidated life insurance fund of Tk. 38,348.57 million as against decrease in consolidated life revenue account of Tk. 341.26 million with consolidated life insurance fund of Tk. 36,400.94 million respectively for the same period of the previous year.

ILFSL

The Company has further informed that Net Profit After Tax (NPAT) has declined by 80.39% compared to last year for the following reasons: i) In comparison for the same period in 2018, Interest income is increased by 9.6% due to increase of the weighted lending rate of Loans and advances. ii) Interest expense is increased by 26.73% in comparison from the same period due to increase of the cost of fund of the company. iii) Investment income is increased by 167.28% in comparison from the same period due to increased investment income of the subsidiary company. iv) Commission, fees, exchange and brokerage income is increased by 109.74% in comparison from the same period due to increased Commission, fees, exchange and brokerage income of the subsidiary company. v) Provision for Diminution in value of Investment has decreased by BDT 86 million as most of the provision is realized. vi) Provision for leases, loans and advances is increased by BDT 43 million as the quality of assets is increased.

The Board of Directors has recommended 5% stock dividend for the year ended on December 31, 2018. Date of AGM: 22.08.2019, Time: Will be notified later, Venue: FARs Hotel & Resorts, 212,

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Shahid Syed Nazrul Islam Sharani, Purana Paltan, Dhaka. Record Date: 23.07.2019. The Company has also reported Consolidated EPS of Tk. 0.53, Consolidated NAV per share of Tk. 13.36 and Consolidated NOCFPS of Tk. (6.29) for the year ended on December 31, 2018 as against Tk. 1.84, Tk. 12.83 and Tk. 7.26 respectively for the same period of the previous year. The Company has further informed that NPAT has declined by 71.07% compared to last year for the following reasons: i) In 2017, ILFSL has investment income of Tk. 189 million but this year there was loss of Tk. 64 million ii) Commission, fees, exchange and brokerage income has been decreased by Tk. 114 million due to less brokerage income from subsidiary (International Leasing Securities Limited). iii) Due to increase in asset quality Provisions for lease, loans and advances has decreased by Tk. 65 million in 2018 compared to 2017. iv) Provision for Diminution in value of Investment has decreased by Tk. 23 million. v) Provision for income tax is increased by Tk. 141 million in 2018 compared to 2017 because the claim from write off loan is decreased by Tk. 365 million.

PRIMELIFE

The Board of Directors has recommended 12% Cash Dividend for the year ended on December 31, 2018. The Board has also decided to reconstitute the Board of the Company. Date of EGM & AGM: 26.09.2019, Time: 11:00 AM, Venue: Celebrity Convention Hall, Plot # 12, Block CWS (C), Gulshan South Avenue, Gulshan-1, Dhaka-1212. Record Date for EGM & AGM: 21.07.2019.

FIRSTFIN

The Board of Directors has recommended No dividend for the year ended on December 31, 2018. Date & Time of AGMs: 25.07.2019 (suspended 24th AGM at 10:00 AM & pending 25th AGM at 11:30 AM; due to suspension of immediate 24th AGM). Date & Time of 26th AGM: 19.09.2019 at 11:00 AM. Venue of the 24th, 25th & 26th AGMs: Trust Milonayaton, 545, Old Airport Road, Dhaka Cantonment, Dhaka. Record Dates: 23.05.2017 (for 24th AGM; same as before), 30.08.2018 (for 25th AGM; same as before) and 23.07.2019 (for 26th AGM). (Continuation news of FIRSTFIN): The Company has reported EPS of Tk. (3.49), NAV per share of Tk. 7.39 and NOCFPS of Tk. 8.91 for the year ended on December 31, 2018 as against Tk. (2.62), Tk. 10.88 and Tk. 2.60 respectively for the same period of the previous year.

GPHISPAT

With reference to their earlier news disseminated by DSE on 16.09.2018 with regard to decision to invest as equity in a Private Limited Company, the Company has further informed that the Board of Directors of the Company decided to invest Tk. 6.00 Crore as equity in Star Allied Venture Limited against purchase of 50 acres land in Mirershorai Economic Zone, Mirershorai, Chattogram to set up a TBR Tyre Factory. It is mentioned here that Tk. 6.00 crore is the additional amount of equity of earlier Tk. 25.00 lac investment as equity.