

Daily Market Update

Market closed flat in green today. The benchmark index DSEX (+0.05%) gained 2.61 points and closed at 5,655.82 points today. The blue chip index DS30 (+0.91%) and the shariah based index DSES (+0.05%) both closed in green. The large cap sectors showed mixed performance today. Food & Allied posted the highest gain of 3.96% followed by Pharmaceuticals (+0.57%), Banks (+0.55%), and Telecommunication (+0.22%). Engineering posted the highest loss of 0.99% followed by Power (-0.32%) and NBFIs (-0.05%). Turnover stood at BDT 5.85 billion (USD 70.4 million) which was 17.4% lower than the previous session's value. BATBC (+5.0%) was the highest traded share with a turnover of BDT 536.9 million.

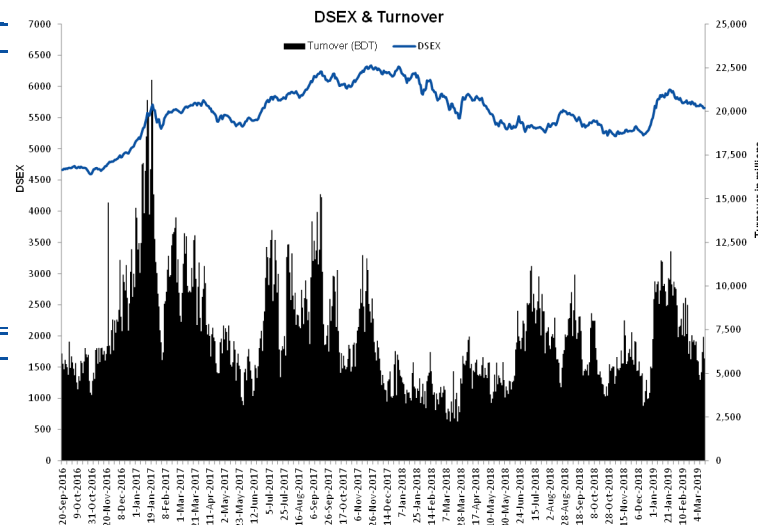
Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Turnover	% of Total Turnover
Banks	1,554.25	1,545.71	8.54	0.55%	30	634,376.6	17.42%	1,066.6	18.44%
NBFIs	2,156.99	2,158.04	-1.04	-0.05%	23	197,898.5	5.43%	182.9	3.16%
Mutual Funds	671.01	673.86	-2.86	-0.42%	38	35,866.5	0.98%	26.6	0.46%
General Insurance	1,823.87	1,867.82	-43.95	-2.35%	35	49,402.6	1.36%	273.1	4.72%
Life Insurance	2,058.26	2,066.56	-8.30	-0.40%	12	57,387.3	1.58%	51.0	0.88%
Telecommunication	5,450.53	5,438.55	11.98	0.22%	2	547,816.2	15.04%	123.8	2.14%
Pharmaceuticals	2,865.33	2,849.08	16.25	0.57%	31	540,908.2	14.85%	654.2	11.31%
Fuel & Power	2,028.04	2,034.62	-6.58	-0.32%	20	502,747.2	13.80%	586.5	10.14%
Cement	1,728.98	1,704.89	24.09	1.41%	7	105,146.0	2.89%	86.8	1.50%
Services & Real Estate	1,010.78	1,017.30	-6.53	-0.64%	8	39,602.8	1.09%	60.1	1.04%
Engineering	3,069.11	3,099.91	-30.81	-0.99%	37	199,269.5	5.47%	608.7	10.52%
Food & Allied	19,263.75	18,529.85	733.90	3.96%	17	354,527.4	9.73%	629.4	10.88%
IT	1,817.96	1,866.98	-49.02	-2.63%	9	20,099.8	0.55%	170.7	2.95%
Textiles	1,403.36	1,423.89	-20.53	-1.44%	53	136,102.4	3.74%	524.4	9.06%
Paper & Printing	8,259.51	8,369.14	-109.63	-1.31%	3	15,791.4	0.43%	16.8	0.29%
Tannery	2,730.03	2,675.72	54.31	2.03%	6	29,397.9	0.81%	288.8	4.99%
Jute	18,456.44	18,462.75	-6.31	-0.03%	3	4,078.9	0.11%	12.6	0.22%
Ceramics	629.72	616.03	13.69	2.22%	5	30,415.1	0.84%	221.7	3.83%
Miscellaneous	2,550.32	2,543.61	6.71	0.26%	13	141,509.1	3.89%	199.8	3.45%

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)
Prime Finance First MF	10.30	8.4%	8.5
Monno Jute Staffers	1,790.10	6.3%	57.3
BRAC Bank	88.50	5.2%	442.1
Monno Ceramic	353.90	5.1%	212.8
Reckitt Benckiser	3,246.20	5.0%	77.7
BATBC	4,776.70	5.0%	536.9
Bata Shoe	1,265.30	4.8%	136.2
Heidelberg Cement	356.20	4.1%	12.4
Glaxo Smithkline	1,566.90	4.1%	13.6
ICB AMCL Sonali Bank Limited 1st Mutual	7.20	2.9%	.0

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Safko Spinnings	20.30	-7.7%	34.7
Genex Infosys Limited	42.20	-7.7%	75.8
Emerald Oil Industries Ltd.	16.80	-7.2%	2.0
Bangladesh National Insurance Company	18.60	-6.5%	12.1
Simtex Industries Limited	28.70	-6.5%	29.2
Indo-Bangla Pharmaceuticals Limited	25.10	-6.3%	27.2
Continental Ins Ltd.	20.60	-5.9%	3.8
Jute Spinners	84.20	-5.9%	.1
Sonar Bangla Ins	56.80	-5.3%	29.0
S. S. Steel Limited	32.10	-5.3%	14.5

Most Traded Share	Close	Δ%	Turnover (mn BDT)
BATBC	4,776.70	5.0%	536.9
BRAC Bank	88.50	5.2%	442.1
United Power Generation & Distribution Company Ltd	405.40	0.4%	274.9
Dutch-Bangla Bank	218.10	0.2%	250.9
Monno Ceramic	353.90	5.1%	212.8

Square Pharmaceuticals	267.60	0.5%	184.1
Singer Bangladesh	277.00	1.9%	143.7
Bata Shoe	1,265.30	4.8%	136.2
Mercantile Insurance	33.70	0.0%	85.0
Bangladesh Submarine Cable Company Lim-	152.30	-3.7%	85.0



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

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

Index	Closing	Opening	Δ(Pts)	Δ%	%ΔYTD
DSEX	5,655.82	5,653.21	2.61	0.05%	5.02%
DS30	2,023.66	2,005.49	18.17	0.91%	7.60%
DSES	1,292.83	1,292.20	0.63	0.05%	4.87%

	Advanced	Declined	Unchanged	Total
All Category	77	231	39	347
A Category (Equity)	65	182	25	272
B Category (Equity)	1	28	4	33
N Category (Equity)	0	2	1	3
Z Category (Equity)	11	19	9	39
Mutual Funds	8	17	11	36
Corporate Bonds	0	1	0	1

Market Stat		Today	Last Day	% Change
Mcap	Mn BDT	4,196,592.3	4,180,575.5	
	Mn USD	50,482.3	50,289.6	0.4%
Turnover	Mn BDT	5,850.1	7,081.3	-17.4%
	Mn USD	70.4	85.2	
Volume	Mn Shares	104.5	140.9	-25.8%
Trade		130,804	134,164	-2.5%

Corporate Actions: Upcoming Record Dates

DSE Ticker	Company Name	Rights	Stock	Cash	Year End	Record Date
UNITEDFIN	United Finance Limited		0.0%	10.0%	31-Dec-2018	18-Mar-2019
GLAXOSMITH	GlaxoSmithKline (GSK) Bangladesh Ltd.		0.0%	530.0%	31-Dec-2018	21-Mar-2019
SINGERBD	Singer Bangladesh Limited		30.0%	0.0%	31-Dec-2018	24-Mar-2019
LHBL	LafargeHolcim Bangladesh Limited		0.0%	10.0%	31-Dec-2018	24-Mar-2019
VAMLRBBF	Vanguard AML Rupali Bank Balanced Fund		0.0%	5.0%	31-Dec-2018	24-Mar-2019
LINDEBD	Linde Bangladesh Limited		0.0%	375.0%	31-Dec-2018	25-Mar-2019
PARAMOUNT	Paramount Insurance Company Ltd.		5.0%	0.0%	31-Dec-2018	28-Mar-2019
BATBC	British American Tobacco Bangladesh Company Limited		200.0%	500.0%	31-Dec-2018	4-Apr-2019

Important DSE News
GP

The auditor of the company has given the following "Emphasis of Matter" paragraph in the audit report of the company prepared for the year ended on 31 December 2018. Emphasis of Matter: We draw attention to Note 45 to the financial statements, where management explains the circumstances of claim from Bangladesh Telecommunication Regulatory Commission (BTRC), claim from National Board of Revenue (NBR) for SIM tax on replacement SIMs, the uncertainties of getting rebate of input VAT related to 2G license renewal fee and claim from Large Taxpayers Unit (LTU) -VAT based on assessment by office of the Comptroller and Auditor General (C&AG), interest claim on SIM tax from NBR and management's position on the same. Our opinion is not modified in respect of this matter.