

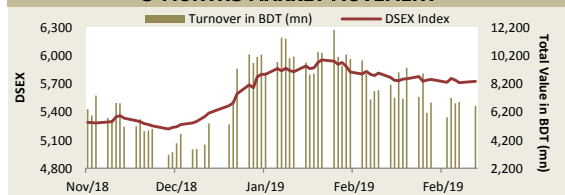
TODAY'S MARKET REVIEW

The stock market returned to the green after witnessing two sessions of profit booking sell pressure amidst the mixed trading behavior of the investors. The shaky investors went for selling of shares from the beginning of the session, while some expectant investors took position in the middle of the session especially on engineering, bank, financial institutions and food sectors which helped the prime index to close green. The Investors' selling spree was observed in different stocks, especially from telecom, fuel & power, pharma, insurance and miscellaneous sectors. Trading activities remained almost same over last session where engineering and bank sector seized the investors' attention. Top gainer and loser lists were mostly dominated by small cap and 'Z' category' stocks. Top ten traded stocks captured around 41.1% of the day's total turnover while MONNOCERA dominated with 5.9% of total turnover. At the days end, the DSEX, DSES and DS30 added 11.2 points, 3.3 points and 3.8 points respectively to their previous day's level.

The major sectors witnessed mixed performance today. Among the major sectors based on market capitalization – engineering (0.8%), bank (0.3%), financial institutions (0.4%), cement (3.1%) and food (0.8%) sectors achieved price appreciation while telecom (-0.8%), fuel & power (-1.4%), pharma (-0.3%) and general insurance (-2.6%) sectors witnessed price correction in the day's session. The investors' activity was mostly centered on engineering (18.4%), bank (14.8%) and textile (11.5%) sectors while MONNOCERA (5.9%), SINGERBD (5.4%) and UCB (5.4%) led the scrip wise turnover board today. The port city bourse, CSE increased by 28.4 points in its broad based index – CASPI.

TODAY'S MARKET SUMMARY

	Today	Yesterday	Change	%
DSEX	5,723	5,712	11.2	0.2%
DS30	2,002	1,999	3.8	0.2%
DSES	1,318	1,315	3.3	0.2%
Market Cap (BDT bn)	4,147	4,151	(3.4)	-0.1%
Turnover (BDT mn)	6,623	6,892	(269.8)	-3.9%
Volume (mn)	146	144	1.7	1.2%
No of Issues Advanced	139	105		
No of Issues Declined	153	190		
Issues Unchanged	48	51		
Market Trailing P/E	16.2	16.2		
Market Forward P/E	16.3	16.4		

3-MONTHS MARKET MOVEMENT

UPCOMING IPOs

Name	Subs. Open	Subs. Close	Offer Price (BDT)	
SILCO PHARMACEUTICALS LTI	7/Mar/19	19/Mar/19		10

SELECTED EARNINGS (EPS) UPDATE (BDT)

Name	Latest Q	Previous Q	Growth	Q
SINGERBD	11.96	9.79	22.2%	Q4
LHBL	0.96	0.69	39.1%	Q1
VAMLRBBF	-0.18	1.25	-114%	Q4

UPCOMING DIVIDENDS/ RIGHTS OFFERINGS

Ticker	Record Date	Date of AGM	Declaration
LHBL	24.03.2019	16.05.2019	10% C
SINGERBD	24.03.2019	23.04.2019	30% S
VAMLRBBF	24.03.2019	-	5% C

TODAY'S WORLD STOCK INDICES

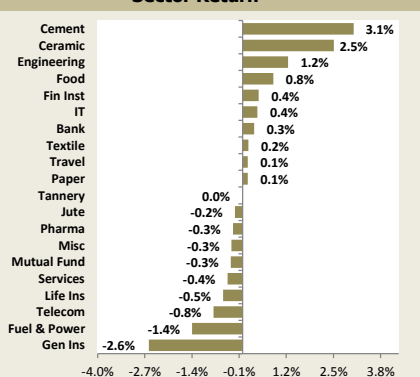
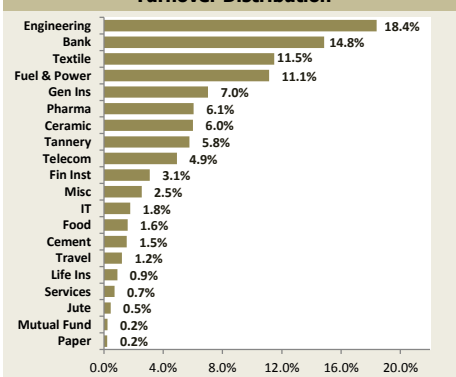
	Value	Change	% Change
DJIA (USA)	26,026.32	110.32	0.43%
FTSE 100 (UK)	7,106.73	32.00	0.45%
SENSEX (India)	36,063.81	196.37	0.55%
STI (Singapore)	3,220.40	7.71	0.24%
Nikkei 225 (Japan)	21,602.69	217.53	1.02%

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TODAY'S SECTOR MOVEMENT

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	0.3%	983.3	14.8%	17.3%	9.4	10.8	1.0
Cement	3.1%	102.3	1.5%	2.9%	36.9	35.0	2.7
Ceramic	2.5%	397.9	6.0%	1.0%	29.0	22.5	2.2
Engineering	1.2%	1,218.7	18.4%	5.8%	17.4	18.4	1.7
Financial Institutions	0.4%	205.3	3.1%	5.5%	13.8	25.5	1.8
Food & Allied	0.8%	106.0	1.6%	8.1%	29.0	21.9	7.0
Fuel & Power	-1.4%	737.9	11.1%	14.1%	15.0	13.4	1.9
General Insurance	-2.6%	465.5	7.0%	1.5%	15.7	15.2	1.2
IT	0.4%	117.4	1.8%	0.6%	25.2	21.5	2.7
Jute	-0.2%	30.2	0.5%	0.1%	974.3	91.0	6.1
Life Insurance	-0.5%	60.1	0.9%	1.6%	-	-	-
Miscellaneous	-0.3%	168.7	2.5%	3.7%	22.6	31.2	1.3
Mutual Fund	-0.3%	15.9	0.2%	1.0%	7.5	12.9	16.8
Paper & Printing	0.1%	15.4	0.2%	0.5%	20.6	36.1	1.6
Pharma. & Chemicals	-0.3%	400.9	6.1%	14.9%	19.5	19.0	2.6
Services & Real Estate	-0.4%	47.7	0.7%	0.5%	16.8	17.7	1.1
Tannery	0.0%	382.3	5.8%	0.8%	18.7	17.2	2.6
Telecommunication	-0.8%	325.8	4.9%	15.4%	20.2	15.6	11.5
Textile	0.2%	760.4	11.5%	4.0%	18.6	18.3	1.1
Travel & Leisure	0.1%	81.0	1.2%	0.6%	32.4	24.3	0.6

Sector Return

Turnover Distribution

TOP GAINERS

Ticker	Price (BDT)	Change**	Forward P/E*
FIRSTFIN	6.6	10.0%	n/a
EMERALDOIL	17.9	9.1%	n/a
INTECH	47.0	8.0%	16.8
LHBL	43.9	7.6%	45.7
MONNOCERA	441.3	6.7%	27.1
IMAMBUTTON	19.2	6.7%	n/a
VFSTDL	59.2	6.7%	26.0
PREMIERBAN	16.1	6.6%	8.6
JUTESPINN	99.4	6.0%	n/a
AIL	86.4	5.8%	22.7

TOP LOSERS

Ticker	Price (BDT)	Change**	Forward P/E*
SONARGAON	33.0	-7.3%	56.9
EASTERNINS	52.2	-7.3%	20.2
TAKAFULINS	31.7	-7.0%	23.3
BIFC	5.5	-6.8%	n/a
BNICL	23.7	-5.2%	10.7
FEDERALINS	12.8	-5.2%	23.4
KARNAPHULI	20.3	-5.1%	18.3
ASIAINS	33.0	-4.9%	19.3
ZEALBANGLA	37.6	-4.8%	n/a
SONARBAINS	64.1	-4.8%	36.4

TOP TURNOVER^o (BDT mn)

Ticker	Price (BDT)	Turnover	% Turnover
MONNOCERA	441.3	389.4	5.9%
SINGERBD	248.4	358.5	5.4%
UCB	18.8	355.4	5.4%
BSCCL	175.5	289.9	4.4%
PREMIERBAN	16.1	276.8	4.2%
FORTUNE	37.6	271.3	4.1%
AIL	86.4	262.1	4.0%
UPGDCL	393.5	214.7	3.2%
NPOLYMAR	91.6	159.9	2.4%
MONNOSTAF	2,018.0	141.0	2.1%

TOP MKT CAP (BDT mn)

Ticker	Price (BDT)	M. Cap	% M.Cap
GP	390.0	526,617	14.6%
BATBC	3,765.0	225,900	6.3%
SQURPHARMA	272.6	215,084	6.0%
UPGDCL	393.5	188,521	5.2%
RENATA	1,168.2	94,082	2.6%
BRACBANK	81.7	89,640	2.5%
BERGERPBL	1,825.0	84,640	2.4%
ICB	119.9	83,651	2.3%
LHBL	43.9	50,984	1.4%
OLYMPIC	229.8	45,946	1.3%

 Source: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; ILS Research Team

 * Based on current outstanding no. of shares; **No. of shares adjusted on record date; ^oTurnover includes block trade

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