

**TODAY'S MARKET REVIEW**

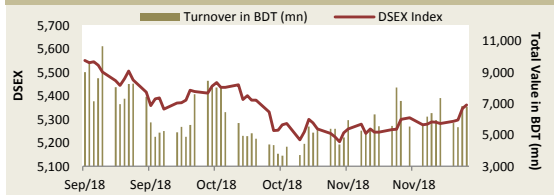
The stock market continued the bullish trend for the four consecutive sessions as the excited investors were active on the bank sector stocks. The morning positive vibe persisted till the end amid some volatility in the session. The investors' sentiment regarding the market stayed positive as some investors took position especially in bank, engineering and financial institutions sectors stocks. However, the shaky investors opted to book some quick gain on cement, textile, pharma, telecom and fuel & power sectors stocks. Turnover stayed flat over last session as the investors remained cautious about fresh investment ahead of national election. Textile sector continued to dominate the turnover chart where 'Z' category stocks seized the top gainer list. At the days end, the DSEX and DS30 added 15.68 points and 2.07 points respectively while the DSES lost 3.69 points to their previous day's level.

The major sectors witnessed mixed performance today. Among the major sectors based on market capitalization – bank (1.4%), engineering (0.5%) and financial institution (0.4%) sectors achieved price appreciation while cement (-2.2%), textile (-0.6%) and pharma (-0.5%) sectors witnessed price correction in the day's session. The investors' activity was mostly centered on textile (26.5%), pharma (15.4%) and engineering (13.6%) sectors while DSSL (4.9%), BRACBANK (3.8%) and PTL (3.4%) led the scrip wise turnover board today.

The port city bourse, CSE increased by 52.19 points in its broad based index – CASPI.

**TODAY'S MARKET SUMMARY**

	Today	Yesterday	Change	%
DSEX	5,361	5,345	15.7	0.3%
DS30	1,872	1,870	2.1	0.1%
DSES	1,231	1,235	(3.7)	-0.3%
Market Cap (BDT bn)	3,841	3,841	0.8	0.0%
Turnover (BDT mn)	6,796	6,835	(38.9)	-0.6%
Volume (mn)	216	214	1.8	0.8%
No of Issues Advanced	176	211		
No of Issues Declined	131	85		
Issues Unchanged	33	45		
Market Trailing P/E	14.8	14.8		
Market Forward P/E	14.7	14.7		

**3-MONTHS MARKET MOVEMENT**

**UPCOMING DIVIDENDS/ RIGHTS OFFERINGS**

Ticker	Record Date	Date of AGM	Declaration
BATASHOE	11.12.2018	N/A	240% Interim Cash
KEYACOSMET	12.12.2018	26.01.2019	10%B
AMCL(PRAN)	13.12.2018	27.12.2018	32%C

**DSE NEWS IN BRIEF**

**SKTRIMS:** The Company has informed that the Board of Directors of the Company has decided to invest 30% shares (i.e. amounting to taka 1,50,00,000.00) of Shahjalal Asset Management Limited. The application for approving the Asset Management Company will be submitted within short time subject to approval from BSEC.

**MEGHNACEM:** The Company has informed that it has credited the bonus shares for the year ended on June 30, 2018 to the respective shareholders' BO Accounts.

**TODAY'S WORLD STOCK INDICES**

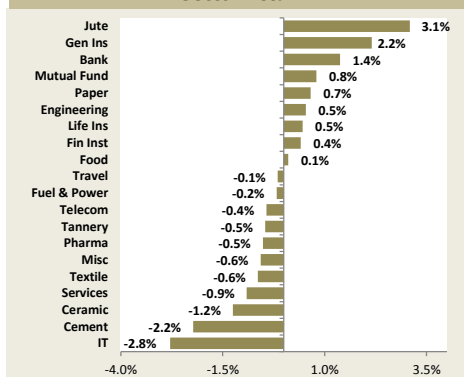
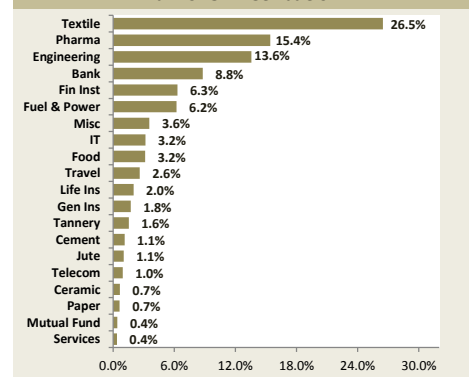
	Value	Change	% Change
DJIA (USA)	25,027.07	-799.36	-3.10%
FTSE 100 (UK)	6,929.94	-92.82	-1.32%
SENSEX (India)	35,872.94	-261.37	-0.72%
STI (Singapore)	3,147.85	-19.94	-0.63%
Nikkei 225 (Japan)	21,919.33	-116.72	-0.53%

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**TODAY'S SECTOR MOVEMENT**

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	1.4%	597.6	8.8%	17.6%	8.7	10.0	0.9
Cement	-2.2%	76.9	1.1%	3.1%	36.3	38.1	2.8
Ceramic	-1.2%	45.9	0.7%	0.9%	23.9	22.7	1.9
Engineering	0.5%	923.1	13.6%	5.8%	16.2	16.1	1.6
Financial Institutions	0.4%	430.4	6.3%	5.8%	13.3	23.8	1.7
Food & Allied	0.1%	214.3	3.2%	7.9%	25.8	19.1	6.2
Fuel & Power	-0.2%	423.6	6.2%	13.0%	12.7	10.5	1.6
General Insurance	2.2%	119.1	1.8%	1.2%	11.3	11.3	0.8
IT	-2.8%	216.7	3.2%	0.5%	24.0	22.0	2.2
Jute	3.1%	71.5	1.1%	0.1%	1,021.2	207.4	6.2
Life Insurance	0.5%	136.7	2.0%	1.7%	-	-	-
Miscellaneous	-0.6%	242.1	3.6%	3.2%	18.3	26.7	1.1
Mutual Fund	0.8%	29.2	0.4%	1.0%	7.0	14.1	15.9
Paper & Printing	0.7%	44.7	0.7%	0.6%	23.9	26.6	1.9
Pharma. & Chemicals	-0.5%	1,048.4	15.4%	15.6%	18.7	18.0	2.5
Services & Real Estate	-0.9%	26.2	0.4%	0.6%	15.9	13.6	1.1
Tannery	-0.5%	105.4	1.6%	0.8%	18.4	16.2	2.5
Telecommunication	-0.4%	65.6	1.0%	15.2%	18.2	14.3	12.7
Textile	-0.6%	1,797.8	26.5%	4.6%	19.6	16.9	1.1
Travel & Leisure	-0.1%	178.8	2.6%	0.7%	32.3	25.9	0.6

**Sector Return**

**Turnover Distribution**

**TOP GAINERS**

Ticker	Price (BDT)	Change**	Forward P/E*
VAMLBDMF1	7.7	10.0%	18.8
RNSPIN	9.9	10.0%	13.0
FAREASTFIN	5.5	10.0%	n/a
FAMILYTEX	5.6	9.8%	63.9
KPPL	21.3	9.8%	n/a
ALLTEX	10.1	9.8%	n/a
ISLAMIINS	23.0	9.5%	16.0
DACCADYE	5.9	9.3%	n/a
TUNGHAI	4.9	8.9%	n/a
SAVAREFR	97.7	8.7%	n/a

**TOP LOSERS**

Ticker	Price (BDT)	Change**	Forward P/E*
MLDYEING	47.2	-9.9%	37.3
MONNOSTAF	1,695.1	-6.1%	222.8
RDFOOD	17.4	-5.4%	32.6
SILVAPHL	36.2	-5.2%	18.9
ITC	49.9	-5.0%	47.3
PREMIERCCEM	64.6	-4.6%	15.8
IBP	41.1	-4.2%	36.5
ADVENT	47.8	-4.0%	11.8
KDSALTD	52.8	-4.0%	50.8
KTL	31.2	-4.0%	16.8

**TOP TURNOVER\* (BDT mn)**

Ticker	Price (BDT)	Turnover	% Turnover
DSSL	26.7	333.2	4.9%
BRACBANK	77.0	255.7	3.8%
PTL	68.6	229.2	3.4%
WMSHIPYARD	22.0	225.9	3.3%
BBSCABLES	97.6	173.0	2.5%
SAIHAMCOT	27.3	169.0	2.5%
MLDYEING	47.2	157.9	2.3%
UNIQUEHRL	52.8	155.3	2.3%
UPGDCL	285.8	126.0	1.9%
ADVENT	47.8	123.6	1.8%

**TOP MKT CAP (BDT mn)**

Ticker	Price (BDT)	M. Cap	% M.Cap
GP	360.8	487,188	14.8%
SQURPHARMA	257.4	203,091	6.2%
BATBC	3,299.8	197,988	6.0%
UPGDCL	285.8	136,923	4.2%
RENATA	1,127.8	90,828	2.8%
BRACBANK	77.0	84,483	2.6%
ICB	114.2	79,675	2.4%
BERGERPBL	1,333.4	61,840	1.9%
LHBL	43.9	50,984	1.5%
OLYMPIC	212.0	42,387	1.3%

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

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

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