

TODAY'S MARKET REVIEW

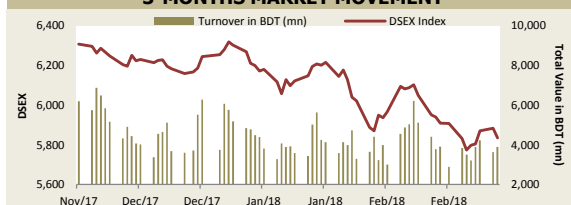
The prime index of the Dhaka Stock Exchange observed profit booking selling off today, ending a four day bull run amid investors' cautious stance. The investors went for profit booking sell from the beginning of the session and continued till the end. Bank and financial institution sectors' stocks observed most liquidation ahead of their year-end declaration. Apart from this, cement, textile and telecom sectors also observed correction in today's session. On the other hand, mutual fund and food sectors' stocks witnessed investor's buoyancy. Meanwhile, CAPM IBBL Islamic Mutual Fund, which made debut today, lost 6% from its offering price of BDT 10.0. Small cap stocks continued to dominate the top gainers list. At the day's end, the DSEX, DSES and DS30 lost 48.1 points, 6.1 points and 20.0 points respectively to their previous day's level.

The major sectors witnessed correction today. Among the major sectors based on market capitalization – bank (-1.6%), financial institution (-1.3%) cement (-1.2%), textile (-1.1%), and telecom (-0.6%) sectors witnessed price correction while mutual fund (1.2%) and food (0.3%) sector achieved price appreciation in the day's session. The investors' activity was mostly centered on engineering (20.0%), pharmaceuticals (16.1%) and textile (11.4%) sectors while IBNSINA (4.3%), MONNOCERA (3.9%) and SQRPHARMA (3.4%) led the scrip wise turnover board today.

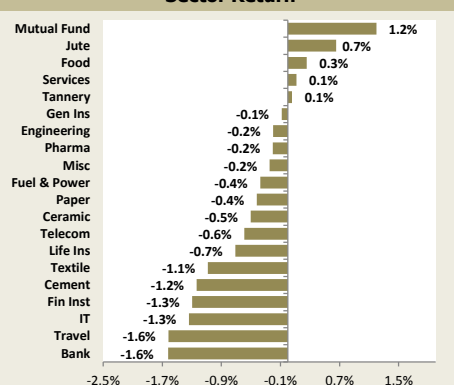
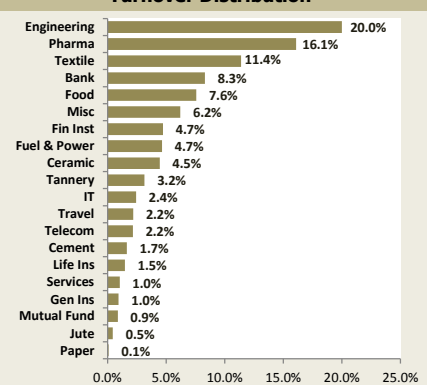
The port city bourse, CSE decreased by 142.2 points in its broad based index – CASPI.

TODAY'S MARKET SUMMARY

	Today	Yesterday	Change	%
DSEX	5,835	5,883	(48.1)	-0.8%
DS30	2,152	2,172	(20.0)	-0.9%
DSES	1,368	1,374	(6.1)	-0.4%
Market Cap (BDT bn)	4,062	4,085	(23.1)	-0.6%
Turnover (BDT mn)	3,895	3,634	261.0	7%
Volume (mn)	87	97	(9.4)	-10%
No of Issues Advanced	90	178		
No of Issues Declined	209	109		
Issues Unchanged	35	47		
Market Trailing P/E	17.2	17.3		
Market Forward P/E	16.7	16.8		

3-MONTHS MARKET MOVEMENT

TODAY'S SECTOR MOVEMENT

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	-1.6%	323.6	8.3%	18.3%	9.7	10.2	1.1
Cement	-1.2%	64.8	1.7%	3.5%	22.1	52.3	3.3
Ceramic	-0.5%	173.4	4.5%	0.8%	27.7	22.5	1.8
Engineering	-0.2%	779.3	20.0%	5.6%	21.9	19.6	1.8
Financial Institutions	-1.3%	184.6	4.7%	6.2%	17.2	15.0	1.8
Food & Allied	0.3%	295.0	7.6%	8.4%	29.9	27.9	8.8
Fuel & Power	-0.4%	181.5	4.7%	10.3%	12.5	11.7	1.5
General Insurance	-0.1%	37.1	1.0%	1.2%	13.6	12.1	0.9
IT	-1.3%	95.1	2.4%	0.4%	24.7	20.5	2.1
Jute	0.7%	17.7	0.5%	0.1%	121.7	754.1	2.3
Life Insurance	-0.7%	58.2	1.5%	1.4%	n/a	n/a	n/a
Miscellaneous	-0.2%	241.9	6.2%	2.7%	21.8	26.5	1.1
Mutual Fund	1.2%	34.1	0.9%	1.2%	9.1	10.8	25.1
Paper & Printing	-0.4%	4.0	0.1%	0.1%	n/a	n/a	1.2
Pharma. & Chemicals	-0.2%	627.6	16.1%	15.6%	21.7	19.5	2.9
Services & Real Estate	0.1%	40.7	1.0%	0.6%	16.8	17.0	1.2
Tannery	0.1%	123.1	3.2%	0.8%	19.6	17.5	2.7
Telecommunication	-0.6%	84.1	2.2%	19.0%	29.2	24.3	16.2
Textile	-1.1%	444.0	11.4%	3.2%	17.6	16.2	0.9
Travel & Leisure	-1.6%	85.4	2.2%	0.7%	39.9	30.0	0.7

Sector Return

Turnover Distribution

DSE NEWS IN BRIEF

NAHEEACP: The Company has informed that the Board of Directors has taken decision to purchase 38.50 decimal project land for an amount of Tk. 56,90,000.00 at Abdar, Telehati, Sreepur, Gazipur (at the same premises of factory) in the name of the Company for future expansion of the project.

UPCOMING DIVIDENDS/ RIGHTS OFFERINGS

Ticker	Record Date	Date of AGM	Declaration
PRIMEINSUR	06.03.2018	29.03.2018	15%C
IDLC	08.03.2018	29.03.2018	30%C
LANKABAFIN	08.03.2018	29.03.2018	7.5%C & 7.5%B
DUTCHBANGL	14.03.2018	29.03.2018	30%C
UNITEDFIN	18.03.2018	26.04.2018	10%C & 5% B
LINDEBD	20.03.2018	26.04.2018	340%C
GLAXOSMITH	21.03.2018	19.04.2018	550%C

TODAY'S WORLD STOCK INDICES

	Value	Change	% Change
DJIA (USA)	24,538.06	-70.92	-0.29%
FTSE 100 (UK)	7,069.90	-105.74	-1.47%
SENSEX (India)	33,738.38	-308.56	-0.91%
STI (Singapore)	3,452.42	-26.78	-0.77%
Nikkei 225 (Japan)	21,042.09	-139.55	-0.66%

TOP GAINERS

Ticker	Price	Change**	Forward P/E*
MIDASFIN	39.1	8.9%	21.7
GEMINISEA	443.7	6.4%	87.3
APEXSPINN	145.2	6.3%	55.4
BDAUTOCA	132.6	6.1%	148.7
AZIZPIPES	150.8	5.5%	203.8
APEXTANRY	153.3	5.3%	191.6
QUASEMIND	73.5	5.0%	32.8
MONNOCERA	150.3	4.1%	44.5
FINEFOODS	41.5	4.0%	n/a
BAYLEASING	26.4	3.9%	20.0

TOP LOSERS

Ticker	Price	Change**	Forward P/E*
BXSYNTH	12.5	-5.3%	n/a
RUPALIINS	19.2	-4.5%	8.2
MEGHANAPET	26.6	-4.3%	n/a
PHOENIXFIN	37.1	-4.1%	16.5
UNIONCAP	17.0	-4.0%	n/a
EBL	41.0	-3.8%	9.2
PRIMEFIN	10.7	-3.6%	n/a
DUTCHBANGL	120.7	-3.6%	9.8
ZEALBANGLA	67.4	-3.6%	n/a
IMAMBUTTON	38.0	-3.6%	n/a

TOP TURNOVER° (BDT mn)

Ticker	Price	Turnover	% Turnover
IBNSINA	260.2	166.1	4.3%
GP	150.3	151.0	3.9%
SQRPHARMA	316.2	131.9	3.4%
NTLTUBES	139.0	123.0	3.2%
GEMINISEA	443.7	81.3	2.1%
GP	481.7	80.9	2.1%
UNIQUHRL	58.9	80.2	2.1%
ANWARGALV	85.2	70.9	1.8%
NAHEEACP	52.3	68.4	1.8%
AIL	101.7	67.8	1.7%

TOP MKT CAP (BDT mn)

Ticker	Price	M. Cap	% M.Cap
GP	481.7	650,440	18.5%
SQRPHARMA	316.2	233,163	6.6%
BATBC	3,621.6	217,296	6.2%
ICB	138.3	91,894	2.6%
RENATA	1,251.1	87,616	2.5%
BRACBANK	92.5	81,191	2.3%
LHBL	57.5	66,779	1.9%
UPGDCL	159.3	63,599	1.8%
OLYMPIC	264.8	52,944	1.5%
ISLAMIBANK	31.5	50,715	1.4%

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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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