

TODAY'S MARKET REVIEW

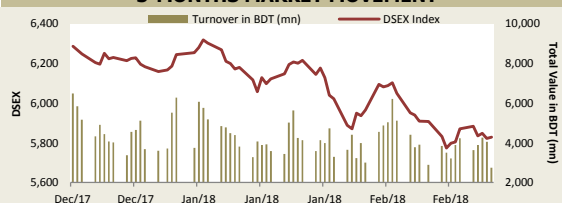
The Dhaka Stocks witnessed a trivial price appreciation after previous day's correction amid record low participation of the investors. The market started with profit booking sell off and remained in negative territory until the investors' last hour buying spree in bank sector stocks, which helped the prime index to close in green. Market turnover, which is an important indicator of the market, was the lowest since July 11, 2016 as it has decreased by 32% over the previous session. Top gainers and losers lists were dominated by small cap stocks whereas turnover list was dominated by large cap stocks. At the day's end, DSEX, and DS30 added 5.8 points and 0.2 points respectively, while DSES lost 0.3 points to their previous day's level.

The major sectors witnessed better performance today. Among the major sectors based on market capitalization – bank (0.6%), financial institution (0.2%) and food (0.2%) sectors achieved price appreciation while engineering (-0.6%), pharmaceutical (-0.2%) and fuel (-0.2%) sectors witnessed price correction in the day's session. The investors' activity was mostly centered on bank (16.5%), pharmaceutical (16.5%) and engineering (15.1%) sectors while SQRPHARMA (5.9%), ALARABANK (4.5%) and MONNOCERA (3.7%) led the scrip wise turnover board today.

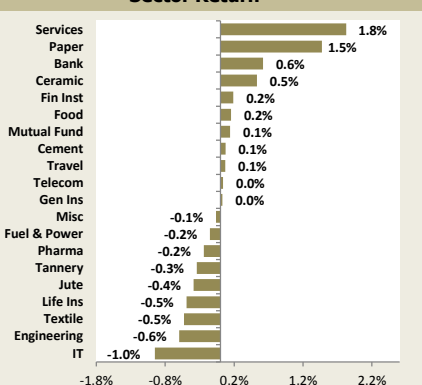
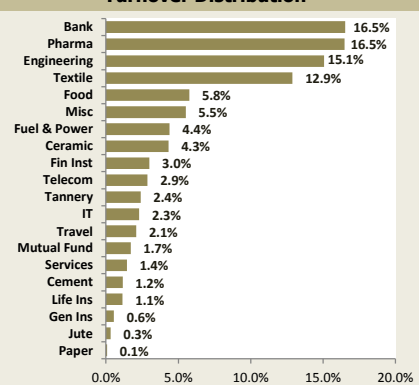
The port city bourse, CSE added by 7.74 points in its broad based index – CASPI

TODAY'S MARKET SUMMARY

	Today	Yesterday	Change	%
DSEX	5,828	5,822	5.8	0.1%
DS30	2,144	2,144	0.2	0.0%
DSES	1,373	1,373	(0.3)	0.0%
Market Cap (BDT bn)	4,063	4,062	1.5	0.0%
Turnover (BDT mn)	2,739	4,057	(1,318.2)	-32%
Volume (mn)	75	111	(36.4)	-33%
No of Issues Advanced	120	167		
No of Issues Declined	162	116		
Issues Unchanged	52	50		
Market Trailing P/E	17.2	17.2		
Market Forward P/E	16.7	16.7		

3-MONTHS MARKET MOVEMENT

TODAY'S SECTOR MOVEMENT

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	0.6%	617.4	15.2%	18.2%	9.6	10.2	1.1
Cement	0.1%	52.6	1.3%	3.5%	22.2	52.5	3.3
Ceramic	0.5%	136.2	3.4%	0.8%	27.9	22.7	1.8
Engineering	-0.6%	743.1	18.3%	5.6%	21.9	19.6	1.8
Financial Institutions	0.2%	162.4	4.0%	6.2%	17.2	15.1	1.8
Food & Allied	0.2%	280.2	6.9%	8.2%	29.2	27.9	7.7
Fuel & Power	-0.2%	142.3	3.5%	10.3%	12.5	11.7	1.5
General Insurance	-0.1%	22.3	0.5%	1.2%	13.5	12.0	0.9
IT	-1.0%	80.8	2.0%	0.4%	25.0	20.7	2.2
Jute	-0.4%	14.8	0.4%	0.1%	121.4	665.8	2.3
Life Insurance	-0.5%	27.0	0.7%	1.4%	n/a	n/a	n/a
Miscellaneous	-0.1%	243.0	6.0%	2.7%	21.7	26.4	1.1
Mutual Fund	0.1%	59.9	1.5%	1.2%	9.3	10.9	25.6
Paper & Printing	1.5%	1.1	0.0%	0.1%	n/a	n/a	1.2
Pharma. & Chemicals	-0.2%	512.2	12.6%	15.6%	21.7	19.5	2.9
Services & Real Estate	1.8%	46.0	1.1%	0.6%	17.2	17.5	1.2
Tannery	-0.3%	107.8	2.7%	0.8%	19.7	17.6	2.7
Telecommunication	0.0%	145.1	3.6%	19.3%	29.6	24.6	16.4
Textile	-0.5%	545.2	13.4%	3.2%	17.7	16.3	0.9
Travel & Leisure	0.1%	118.1	2.9%	0.7%	41.2	31.0	0.7

Sector Return

Turnover Distribution

DSE NEWS IN BRIEF

DBH: The Board of Directors has recommended 30% cash dividend for the year ended on December 31, 2017. Date of AGM: 26.04.2018, Time: 10:30 AM, Venue: will be notified later on. Record date: 29.03.2018. The Company has also reported EPS of Tk. 7.79, NAV per share of Tk. 35.76 and NOCFPS of Tk. 16.56 for the year ended on December 31, 2017 which was Tk. 2.71, Tk. 29.47 and Tk. 29.92 for the 6 months period from July-December, 2016.

UPCOMING DIVIDENDS/ RIGHTS OFFERINGS

Ticker	Record Date	Date of AGM	Declaration
DUTCHBANGL	14.03.2018	29.03.2018	30%C
RELIANCINS	12.03.2018	31.03.2018	15%C & 10%B
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
BATBC	27.03.2018	17.04.2018	600%
NITOLINS	29.03.2018	08.05.2018	14%B
DBH	29.03.2019	26.04.2018	30%C
VAMLRBBF	29.03.2020	-	12%C

TODAY'S WORLD STOCK INDICES

	Value	Change	% Change
DJIA (USA)	24,801.36	-82.76	-0.33%
FTSE 100 (UK)	7,157.84	11.09	0.16%
SENSEX (India)	33,201.90	168.81	0.51%
STI (Singapore)	3,472.66	21.97	0.64%
Nikkei 225 (Japan)	21,368.07	115.35	0.54%

Website: www.ilsibd.com
 E-mail: securities@ilsibd.com

TOP GAINERS

Ticker	Price	Change**	Forward P/E*
IMAMBUTTON	39.0	6.6%	n/a
MEGCONMILK	33.8	5.3%	n/a
SAPORTL	32.0	4.2%	53.3
PREMIERLEA	15.1	4.1%	16.0
TAKAFULINS	26.8	3.9%	15.7
ICBSONALI1	8.6	3.6%	11.0
CONTININS	20.6	3.5%	9.1
SAMATALETH	62.8	3.3%	1962.5
RECKITBEN	1,800.9	3.0%	29.2
VAMLRBBF	10.5	2.9%	8.4

TOP LOSERS

Ticker	Price	Change**	Forward P/E*
ASIAPACINS	23.1	-4.9%	10.8
CENTRALINS	21.2	-4.9%	9.9
SAVAREFR	182.7	-4.6%	n/a
SONARGAON	22.7	-3.8%	n/a
BIFC	9.6	-3.0%	n/a
ZAHENSIN	17.2	-2.8%	10.5
PENINSULA	22.3	-2.6%	34.8
MHSML	16.4	-2.4%	15.5
RAHIMTEXT	271.3	-2.3%	42.0
NAHEEACP	54.6	-2.3%	17.8

TOP TURNOVER° (BDT mn)

Ticker	Price	Turnover	% Turnover
SQRPHARMA	316.1	161.3	5.9%
ALARABANK	25.0	124.6	4.5%
MONNOCERA	151.6	101.7	3.7%
ACI	389.4	73.6	2.7%
GP	489.2	72.0	2.6%
BRACBANK	93.0	62.9	2.3%
IFADAUTOS	119.5	56.0	2.0%
NAHEEACP	54.6	50.3	1.8%
BDTHAI	27.0	49.0	1.8%
APEXFOODS	210.1	47.5	1.7%

TOP MKT CAP (BDT mn)

Ticker	Price	M. Cap	% M.Cap
GP	489.2	660,567	18.8%
SQRPHARMA	316.1	233,089	6.6%
BATBC	3,499.9	209,994	6.0%
ICB	139.1	92,425	2.6%
RENATA	1,261.3	88,330	2.5%
LHBL	57.6	66,895	1.9%
UPGDCL	160.6	64,118	1.8%
OLYMPIC	269.3	53,844	1.5%
BERGERPBL	2,148.2	49,814	1.4%

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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