

**TODAY'S MARKET REVIEW**

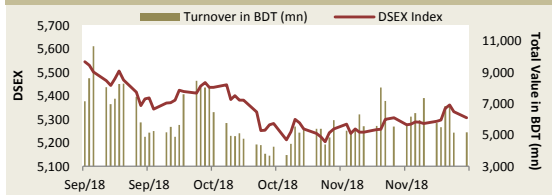
The stock market witnessed another downbeat session in its broad based index amid daylong sell pressure. The depressed market outlook kept the investors worried, which resulted into poor market participation. The shaky investors opted to liquidate their holding of shares from textile, bank, financial institution, engineering and telecom sectors to escape further losses contributed to the fall in indices. However, some optimistic investors took position in food, fuel & power and pharma sectors. Meanwhile, activity from the participants remained flat over last session as the investors were observing the market movement. Textile sector continued to dominate the turnover chart where 'Z' category stocks grabbed the top gainer list. At the day's end, the DSEX, DSES and DS30 lost 26.58 points, 2.15 points and 6.81 points respectively to their previous day's level.

The major sectors witnessed correction today. Among the major sectors based on market capitalization – textile (-2.0%), bank (-1.2%) and financial institution (-1.0%) sectors witnessed price correction while food (0.9%), fuel & power (0.6%) and pharma (0.4%) sectors achieved price appreciation in the day's session. The investors' activity was mostly centered on textile (21.8%), pharma (21.0%) and engineering (10.7%) sectors while UPGDCL (5.2%), ADVENT (3.1%) and PTL (3.1%) led the scrip wise turnover board today.

The port city bourse, CSE decreased by 68.89 points in its broad based index – CASPI.

**TODAY'S MARKET SUMMARY**

	Today	Yesterday	Change	%
DSEX	5,306	5,333	(26.6)	-0.5%
DS30	1,856	1,862	(6.8)	-0.4%
DSES	1,222	1,224	(2.1)	-0.2%
Market Cap (BDT bn)	3,833	3,836	(3.6)	-0.1%
Turnover (BDT mn)	5,168	5,140	27.4	0.5%
Volume (mn)	127	151	(23.6)	-15.7%
No of Issues Advanced	112	112		
No of Issues Declined	195	202		
Issues Unchanged	34	29		
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
PADMAOIL	19.12.2018	16.02.2019	130%C

**DSE NEWS IN BRIEF**

**UPGDCL:** The Company has informed that the Board of Directors of United Ashuganj Energy Ltd. (UAEL), the 195 MW (Gas Based) power plant has declared the following final and interim dividend: i) 8.75% final dividend for the 4th quarter 2017-18 involving Tk. 350,392,788.00 based on the audited financial statements for that year 2017-18. During the year, the company paid total 41.75% Cash Dividend equivalent to Tk. 1,671,874,161.00. ii) 9.75% interim dividend for the 1st quarter of the financial year 2018-19 based on the un-audited financial statements for that Quarter. It is to be informed that UEL is a Subsidiary of UPGDCL, that owns 92.41% shares of UAEL, with effect from 1st July, 2018.

**TODAY'S WORLD STOCK INDICES**

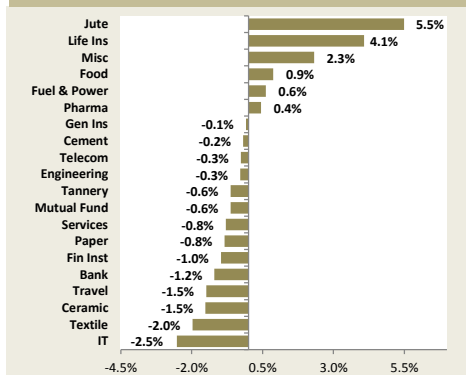
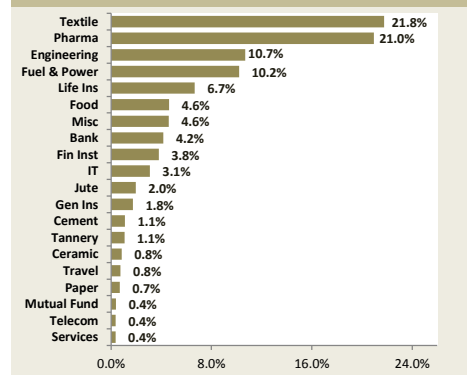
	Value	Change	% Change
DJIA (USA)	24,388.95	-558.72	-2.24%
FTSE 100 (UK)	6,778.11	74.06	1.10%
SENSEX (India)	35,673.25	361.12	1.02%
STI (Singapore)	3,111.12	-4.40	-0.14%
Nikkei 225 (Japan)	21,678.68	177.06	0.82%

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**TODAY'S SECTOR MOVEMENT**

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	-1.2%	215.8	4.2%	17.3%	8.6	9.9	0.9
Cement	-0.2%	57.4	1.1%	3.1%	35.8	37.6	2.7
Ceramic	-1.5%	43.8	0.8%	0.9%	23.5	22.3	1.9
Engineering	-0.3%	552.5	10.7%	5.8%	16.1	16.0	1.6
Financial Institutions	-1.0%	197.1	3.8%	5.7%	13.0	23.4	1.7
Food & Allied	0.9%	239.0	4.6%	8.0%	26.0	19.2	6.3
Fuel & Power	0.6%	528.0	10.2%	13.2%	12.9	10.7	1.6
General Insurance	-0.1%	90.7	1.8%	1.2%	11.2	11.2	0.8
IT	-2.5%	160.1	3.1%	0.5%	23.3	21.3	2.1
Jute	5.5%	102.2	2.0%	0.2%	1,116.6	226.8	6.8
Life Insurance	4.1%	344.9	6.7%	1.8%	-	-	-
Miscellaneous	2.3%	238.3	4.6%	3.3%	18.5	27.0	1.1
Mutual Fund	-0.6%	20.8	0.4%	1.0%	6.9	14.1	15.9
Paper & Printing	-0.8%	35.9	0.7%	0.6%	23.5	26.1	1.9
Pharma. & Chemicals	0.4%	1,083.3	21.0%	15.6%	18.7	18.0	2.5
Services & Real Estate	-0.8%	18.9	0.4%	0.5%	15.6	13.3	1.0
Tannery	-0.6%	55.8	1.1%	0.8%	18.2	16.1	2.5
Telecommunication	-0.3%	19.7	0.4%	15.3%	18.3	14.3	12.8
Textile	-2.0%	1,124.3	21.8%	4.5%	18.9	16.4	1.1
Travel & Leisure	-1.5%	39.5	0.8%	0.7%	32.2	25.8	0.6

**Sector Return**

**Turnover Distribution**

**TOP GAINERS**

Ticker	Price (BDT)	Change**	Forward P/E*
JUTESPINN	128.7	10.0%	n/a
HAKKANIPUL	76.3	9.9%	n/a
ALLTEX	12.2	9.9%	n/a
FAREASTLIF	64.7	8.9%	n/a
DSHGARME	226.5	8.7%	45.1
ECABLES	241.5	8.7%	n/a
JMISMDL	218.4	8.7%	54.6
SONALIANSH	785.6	7.5%	459.4
NTC	879.2	7.5%	11.1
PHARMAID	649.1	7.5%	35.0

**TOP LOSERS**

Ticker	Price (BDT)	Change**	Forward P/E*
RNSPIN	9.0	-8.2%	11.8
ALIF	9.1	-7.1%	10.9
CNATEX	4.0	-7.0%	n/a
FARCHEM	15.0	-6.3%	10.6
FAMILYTEX	5.0	-5.7%	57.1
TUNGHAI	5.0	-5.7%	n/a
PF1STMF	5.2	-5.5%	11.8
RDFOOD	15.9	-5.4%	29.8
PDL	17.2	-5.0%	11.1
TALLUSPIN	6.0	-4.8%	n/a

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

Ticker	Price (BDT)	Turnover	% Turnover
UPGDCL	297.4	269.9	5.2%
ADVENT	49.8	159.7	3.1%
PTL	65.5	158.2	3.1%
WATACHEM	508.8	127.8	2.5%
PHARMAID	649.1	121.1	2.3%
DSSL	24.5	120.8	2.3%
KTL	31.1	103.3	2.0%
NTC	879.2	101.8	2.0%
MEGHNALIFE	72.2	101.4	2.0%
JMISMDL	218.4	94.4	1.8%

**TOP MKT CAP (BDT mn)**

Ticker	Price (BDT)	M. Cap	% M.Cap
GP	362.0	488,809	14.9%
SQRPHARMA	254.2	200,566	6.1%
BATBC	3,313.1	198,786	6.1%
UPGDCL	297.4	142,480	4.3%
RENATA	1,125.4	90,635	2.8%
BRACBANK	74.8	82,069	2.5%
ICB	113.3	79,047	2.4%
BERGERPBL	1,379.2	63,964	1.9%
LHBL	43.0	49,939	1.5%
OLYMPIC	212.1	42,407	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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