

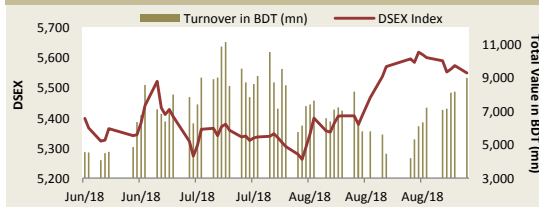
**TODAY'S MARKET REVIEW**

The stock market observed correction after two optimistic sessions amid selling spree in December ending stocks. The investors went for selling from the beginning and persisted till the closure. Investors reshuffled their holdings, mostly from financial institution, telecom and bank sectors to fuel & power, textile and cement sectors' stocks anticipating better performance in the year-end financial disclosure. Meanwhile, VFS Thread Dyeing Limited, which made debut in the session, gained 207.0% from its offering (IPO) price of BDT 10. Total turnover increased by 10.2% over the previous session as optimistic investors continued to inject fresh funds into the market. At the day's end, DSEX, DS30 and DSES lost 24.5 points, 11.1 points and 2.6 points respectively to their previous day's level.

The major sectors witnessed correction today. Among the major sectors based on market capitalization –financial institution (-1.7%), telecom (-1.2%) and bank (-1.2%) sectors witnessed price correction while fuel & power (3.0%), textile (2.1%) and cement (1.0%) sectors achieved price appreciation in the day's session. The investors' activity was mostly centered on textile (20.2%), fuel & power (18.3%) and engineering (16.7%) sectors while ACTIVEFINE (8.0%), KPCL (5.4%) and SAIHAMTEX (5.1%) led the scrip wise turnover board today. The port city bourse CSE decreased by 85.25 points in its broad based index – CASPI.

**TODAY'S MARKET SUMMARY**

	Today	Yesterday	Change	%
DSEX	5,550	5,574	(24.5)	-0.4%
DS30	1,947	1,959	(11.1)	-0.6%
DSES	1,276	1,279	(2.6)	-0.2%
Market Cap (BDT bn)	3,956	3,964	(7.3)	-0.2%
Turnover (BDT mn)	9,009	8,172	837.0	10.2%
Volume (mn)	209	200	9.3	4.7%
No of Issues Advanced	91	136		
No of Issues Declined	197	149		
Issues Unchanged	46	51		
Market Trailing P/E	16.1	16.0		
Market Forward P/E	15.7	15.6		

**3-MONTHS MARKET MOVEMENT**

**UPCOMING DIVIDENDS/ RIGHTS OFFERINGS**

Ticker	Record Date	Date of AGM	Declaration
APEXTANRY	12-Sep-17	8-Oct-17	40% C
DSSL	13-Sep-17	12-Nov-17	5% C & 20% B
ICBAGRANI1	10-Sep-17	-	5.5% C
ICBAMCL2ND	10-Sep-17	-	6% C
ICBSONALI1	10-Sep-17	-	7% C
IFILISLMF1	10-Sep-17	-	9% C
PRIME1ICBA	10-Sep-17	-	7% C
RELIANCE1	12-Sep-17	-	11% C
1JANATAMF	13-Sep-17	-	2% & 6% RIU

**ONGOING/ UPCOMING IPOs**

Name	Subs. Open	Subs. Close	Offer Price (BDT)
Kattali Textile	28-Aug-18	13-Sep-18	10.0

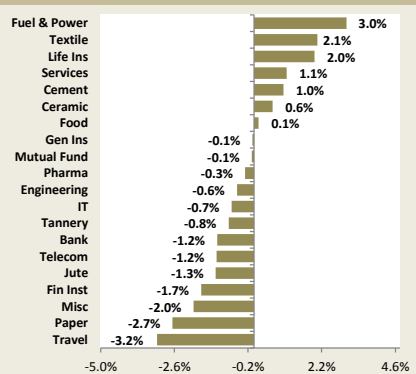
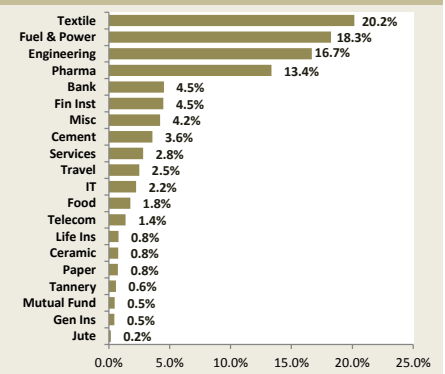
**TODAY'S WORLD STOCK INDICES**

	Value	Change	% Change
DJIA (USA)	25,916.54	-79.33	-0.31%
FTSE 100 (UK)	7,277.70	-41.26	-0.56%
SENSEX (India)	38,389.82	147.01	0.38%
STI (Singapore)	3,134.39	-13.30	-0.42%
Nikkei 225 (Japan)	22,307.06	-180.88	-0.80%

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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%	407.5	4.5%	17.5%	9.0	10.0	0.9
Cement	1.0%	322.4	3.6%	3.5%	34.9	37.8	3.3
Ceramic	0.6%	68.9	0.8%	0.9%	26.5	30.3	2.0
Engineering	-0.6%	1,501.8	16.7%	6.1%	22.9	19.2	2.0
Financial Institutions	-1.7%	404.2	4.5%	6.1%	14.1	18.2	1.8
Food & Allied	0.1%	159.0	1.8%	7.6%	26.0	18.3	6.7
Fuel & Power	3.0%	1,644.8	18.3%	14.0%	16.4	15.9	1.9
General Insurance	-0.1%	41.1	0.5%	1.1%	11.2	10.2	0.8
IT	-0.7%	202.5	2.2%	0.5%	28.3	20.8	2.4
Jute	-1.3%	14.7	0.2%	0.0%	107.4	335.2	2.2
Life Insurance	2.0%	72.3	0.8%	1.5%	-	-	-
Miscellaneous	-2.0%	380.0	4.2%	3.1%	19.2	20.9	1.1
Mutual Fund	-0.1%	43.5	0.5%	1.1%	7.6	8.8	18.4
Paper & Printing	-2.7%	68.2	0.8%	0.7%	-	55.4	2.7
Pharma. & Chemicals	-0.3%	1,203.9	13.4%	14.7%	19.7	17.9	2.6
Services & Real Estate	1.1%	254.5	2.8%	0.6%	17.2	17.7	1.3
Tannery	-0.8%	53.2	0.6%	0.8%	19.2	16.8	2.7
Telecommunication	-1.2%	124.9	1.4%	15.6%	19.1	15.4	11.2
Textile	2.1%	1,815.9	20.2%	3.9%	21.0	18.9	1.1
Travel & Leisure	-3.2%	225.9	2.5%	0.7%	38.5	30.3	0.7

**Sector Return**

**Turnover Distribution**

**TOP GAINERS**

Ticker	Price (BDT)	Change**	Forward P/E*
VFSTDL	30.7	207.0%	20.7
AZIZPIPES	180.5	10.0%	221.9
DSSL	36.8	9.9%	16.4
SAIHAMTEX	36.8	9.9%	33.3
NAHEEACP	76.4	9.8%	24.1
POPULARLIF	104.1	8.8%	n/a
MONNOCERA	294.6	8.7%	110.5
MEGHNACEM	113.7	8.3%	67.1
UPGDCL	319.1	8.0%	33.3
REGENTEX	24.1	6.2%	22.9

**TOP LOSERS**

Ticker	Price (BDT)	Change**	Forward P/E*
JUTESPINN	79.6	-7.7%	n/a
BSCCL	101.7	-6.5%	544.8
ZEALBANGLA	32.0	-6.4%	n/a
AMANFEED	68.8	-5.9%	15.5
IPDC	40.3	-5.0%	25.8
BENGALWTL	36.0	-4.8%	24.1
BIFC	6.1	-4.7%	n/a
NHFIL	77.0	-4.6%	34.7
PENINSULA	33.1	-4.3%	52.8
HRTEX	44.4	-4.3%	24.9

**TOP TURNOVER° (BDT mn)**

Ticker	Price (BDT)	Turnover	% Turnover
ACTIVEFINE	42.5	716.5	8.0%
KPCL	103.0	490.6	5.4%
SAIHAMTEX	36.8	456.9	5.1%
UPGDCL	319.1	390.1	4.3%
DSSL	36.8	388.4	4.3%
SUMITPOWER	44.3	322.0	3.6%
NAHEEACP	76.4	314.7	3.5%
CONFIDCEM	228.9	265.4	2.9%
VFSTDL	30.7	225.1	2.5%
AMANFEED	68.8	189.1	2.1%

**TOP MKT CAP (BDT mn)**

Ticker	Price (BDT)	M. Cap	% M.Cap
GP	380.1	513,249	15.1%
SQURPHARMA	274.6	202,488	5.9%
BATBC	3,313.5	198,810	5.8%
UPGDCL	319.1	152,877	4.5%
ICB	137.6	91,429	2.7%
RENATA	1,220.9	85,501	2.5%
BRACBANK	72.9	79,984	2.3%
LHBL	53.0	61,553	1.8%
BERGERPBL	1,208.0	56,024	1.6%
SUMITPOWER	44.3	47,307	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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