

TODAY'S MARKET REVIEW

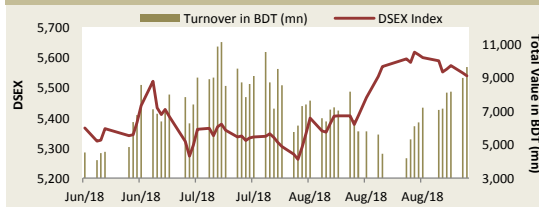
The prime index of the Dhaka Stock Exchange observed correction in the second day in a row amid increased investors' participation. The prime index was in positive side in the major part of the day, but last hour selling spree wipes out the early gains. The investors' propensity towards profit booking on bank, telecom and financial institution sectors' stocks took the market in the negative territory. Some investors shifted their holding to life insurance, textile and engineering sectors' stocks. Investors' participation was the highest after July 22, 2018 as optimistic investors continued to inject fresh funds into the market anticipating optimistic year-end earnings and dividend declaration. Top ten traded stocks captured around 38.1% of the day's total turnover, ACTIVEFINE seized 8.1% of the day's total turnover. At the day's end, DSEX, DS30 and DSES lost 9.7 points, 6.3 points and 3.9 points respectively to their previous day's level.

The major sectors displayed mixed performance today. Among the major sectors based on market capitalization – bank (-0.7%), telecom (-0.5%), and financial institution (-0.4%) sectors witnessed correction while life insurance (4.5%), textile (1.8%) and engineering (1.1%) sectors edged higher in the day's session. The investors' activity was mostly focused on engineering (22.4%), fuel & power (16.0%) and textile (15.5%) sectors while ACTIVEFINE (8.1%), KPCL (6.1%), and BBSCABLES (5.2%) led the scrip wise turnover board today.

The port city bourse, CSE decreased by 20.82 points in its broad based index – CASPI.

TODAY'S MARKET SUMMARY

	Today	Yesterday	Change	%
DSEX	5,540	5,550	(9.7)	-0.2%
DS30	1,941	1,947	(6.3)	-0.3%
DSES	1,272	1,276	(3.9)	-0.3%
Market Cap (BDT bn)	3,952	3,956	(4.7)	-0.1%
Turnover (BDT mn)	9,654	9,009	644.1	7.1%
Volume (mn)	224	209	14.8	7.1%
No of Issues Advanced	106	91		
No of Issues Declined	177	197		
Issues Unchanged	46	46		
Market Trailing P/E	16.1	16.1		
Market Forward P/E	15.6	15.7		

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

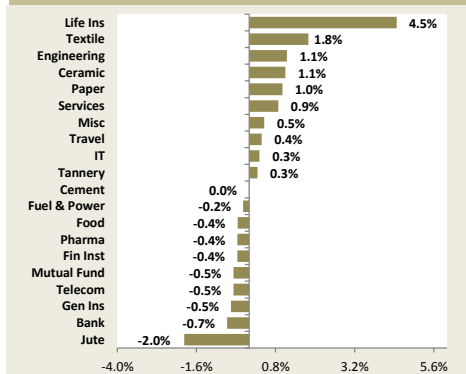
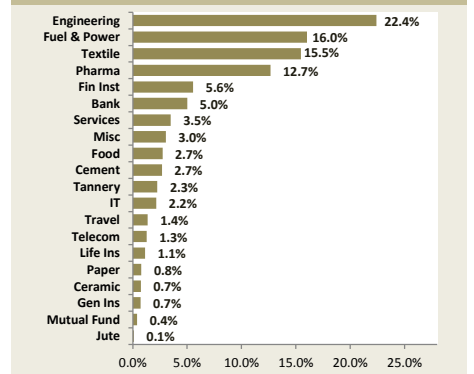
	Value	Change	% Change
DJIA (USA)	25,916.54	-79.33	-0.31%
FTSE 100 (UK)	7,274.18	-3.52	-0.05%
SENSEX (India)	37,995.91	-393.91	-1.03%
STI (Singapore)	3,107.52	-26.87	-0.86%
Nikkei 225 (Japan)	22,373.09	66.03	0.30%

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TODAY'S SECTOR MOVEMENT

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	-0.7%	484.2	5.0%	17.4%	8.9	10.0	0.9
Cement	0.0%	258.4	2.7%	3.5%	34.9	37.8	3.3
Ceramic	1.1%	71.5	0.7%	0.9%	26.8	30.7	2.0
Engineering	1.1%	2,163.8	22.4%	6.2%	23.1	19.4	2.0
Financial Institutions	-0.4%	536.3	5.6%	6.1%	14.0	18.1	1.8
Food & Allied	-0.4%	264.0	2.7%	7.6%	25.9	18.2	6.6
Fuel & Power	-0.2%	1,546.9	16.0%	14.0%	16.4	15.8	1.9
General Insurance	-0.5%	69.5	0.7%	1.1%	11.2	10.1	0.8
IT	0.3%	208.0	2.2%	0.5%	28.4	20.9	2.4
Jute	-2.0%	10.0	0.1%	0.0%	105.3	328.6	2.2
Life Insurance	4.5%	108.5	1.1%	1.6%	-	-	-
Miscellaneous	0.5%	293.3	3.0%	3.1%	19.3	21.0	1.1
Mutual Fund	-0.5%	37.3	0.4%	1.1%	7.5	8.8	18.3
Paper & Printing	1.0%	76.1	0.8%	0.7%	-	56.0	2.7
Pharma. & Chemicals	-0.4%	1,223.5	12.7%	14.7%	19.6	17.8	2.6
Services & Real Estate	0.9%	336.4	3.5%	0.6%	17.4	17.8	1.3
Tannery	0.3%	218.2	2.3%	0.8%	19.3	16.8	2.7
Telecommunication	-0.5%	123.2	1.3%	15.5%	19.0	15.3	11.1
Textile	0.5%	1,492.3	15.5%	3.9%	21.1	19.0	1.1
Travel & Leisure	0.4%	132.3	1.4%	0.7%	38.7	30.4	0.7

Sector Return

Turnover Distribution

TOP GAINERS

Ticker	Price (BDT)	Change**	Forward P/E*
NATLIFEINS	171.0	10.0%	n/a
SHASHADNIM	70.0	9.9%	14.4
MEGCONMILK	16.6	8.5%	n/a
STANCERAM	143.2	7.8%	198.9
STANDARINS	23.9	7.2%	11.3
TITASGAS	42.7	7.0%	12.7
GHAIL	42.7	6.8%	25.8
BBSCABLES	128.9	6.5%	16.6
KPPL	21.4	6.5%	n/a
SONARBAINS	16.6	6.4%	9.7

TOP LOSERS

Ticker	Price (BDT)	Change**	Forward P/E*
NHFIL	70.2	-8.8%	31.6
PENINSULA	30.6	-7.6%	48.8
PRIMEINSUR	13.3	-7.0%	110.8
MITHUNKNIT	15.8	-6.5%	n/a
HAKKANIPUL	49.9	-6.4%	n/a
PLFSL	6.3	-6.0%	n/a
EHL	51.6	-5.5%	14.0
BSCCL	96.2	-5.4%	515.4
CENTRALINS	18.5	-5.1%	7.6
CNATEX	4.4	-4.3%	n/a

TOP TURNOVER° (BDT mn)

Ticker	Price (BDT)	Turnover	% Turnover
ACTIVEFINE	43.3	781.2	8.1%
KPCL	105.4	593.7	6.1%
BBSCABLES	128.9	502.6	5.2%
SHASHADNIM	70.0	336.4	3.5%
SUMITPOWER	42.7	281.7	2.9%
IFADAUTOS	125.6	259.1	2.7%
SAIFPOWER	30.4	254.5	2.6%
NAHEEACP	77.8	253.8	2.6%
CONFIDCEM	231.7	214.0	2.2%
FORTUNE	36.9	204.5	2.1%

TOP MKT CAP (BDT mn)

Ticker	Price (BDT)	M. Cap	% M.Cap
GP	378.9	511,629	15.0%
SQURPHARMA	272.4	200,865	5.9%
BATBC	3,290.0	197,400	5.8%
UPGDCL	314.0	150,433	4.4%
ICB	138.2	91,827	2.7%
RENATA	1,222.0	85,578	2.5%
BRACBANK	72.2	79,216	2.3%
LHBL	52.8	61,321	1.8%
BERGERPBL	1,209.8	56,108	1.6%
SUMITPOWER	42.7	45,598	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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