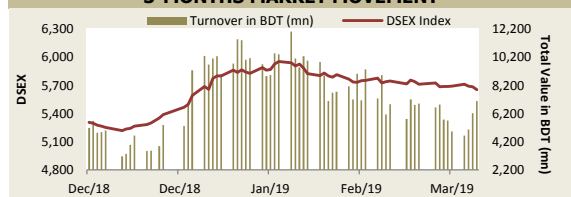


TODAY'S MARKET REVIEW

The benchmark index of the premier bourse continued its downbeat trend losing 57 points for the last three consecutive sessions reached to almost 5650 index level since January 03, 2019. The market opened with optimistic tune, but it did not sustain as the investors went for selling of shares from the middle of the session and continued till the end. The expectant investors reshuffled their holding since the beginning of the session to bank, financial institutions, pharma and miscellaneous sectors based on the upcoming earnings and year-end dividend declarations. The ongoing bearish trend continued to prompt the investors to liquidate their holdings from telecom, textile, engineering, food, cement and insurance sectors which pushed down the index. Investors' participation has increased by 13.8% over the previous session. The bank sector dominated the turnover board and grabbed 26.1% of the day's turnover where DUTCHBANGL topped the turnover list with 8.8% of total turnover. At the day's end, the DSEX, DSES and DS30 lost 29.2 points, 11.7 points and 8.3 points respectively to their previous day's level. Most of the sectors witnessed correction today. Among the major sectors based on market capitalization – telecom (-1.9%), textile (-1.7%), engineering (-1.4%), food (-0.8%) and cement (-1.2%) sectors witnessed price correction while bank (1.6%), financial institutions (1.0%), pharma (0.1%) and miscellaneous (3.5%) sectors achieved price appreciation in the day's session. The investors' activity was mostly centered on bank (26.1%), engineering (11.6%) and fuel & power (10.9%) sectors while DUTCHBANGL (8.8%), BATBC (6.8%) and UPGDCL (6.7%) led the scrip wise turnover board today. The port city bourse CSE decreased by 57.9 points in its broad based index – CASPI.

TODAY'S MARKET SUMMARY

	Today	Yesterday	Change	%
DSEX	5,653	5,682	(29.2)	-0.5%
DS30	2,005	2,014	(8.3)	-0.4%
DSES	1,292	1,304	(11.7)	-0.9%
Market Cap (BDT bn)	4,181	4,189	(8.0)	-0.2%
Turnover (BDT mn)	7,081	6,220	861.4	13.8%
Volume (mn)	141	113	27.8	24.6%
No of Issues Advanced	71	60		
No of Issues Declined	242	261		
Issues Unchanged	33	24		
Market Trailing P/E	16.3	16.4		
Market Forward P/E	16.5	16.6		

3-MONTHS MARKET MOVEMENT

UPCOMING IPOs

Name	Subs. Open	Subs. Close	Offer Price (BDT)
Silco Pharmaceuticals Ltd	7/Mar/19	19/Mar/19	10
Coppertech Industries Ltd	31/Mar/19	9/Apr/19	10

SELECTED EARNINGS (EPS) UPDATE (BDT)

Name	Latest Q	Previous Q	Growth	Q
DUTCHBANGL	21.01	12.28	71.1%	Q4

UPCOMING DIVIDENDS/ RIGHTS OFFERINGS

Ticker	Record Date	Date of AGM	Declaration
DUTCHBANGL	07.04.2019	29.04.2019	150% S

DSE NEWS IN BRIEF

1STPRIMFMF: ICB Asset Management Company Limited has informed that they have taken decision to extend the tenure of Prime Finance First Mutual Fund for another 10 years upto 14.03.2029 as per BSEC Order dated October 02, 2018 (gazette published on October 23, 2018).

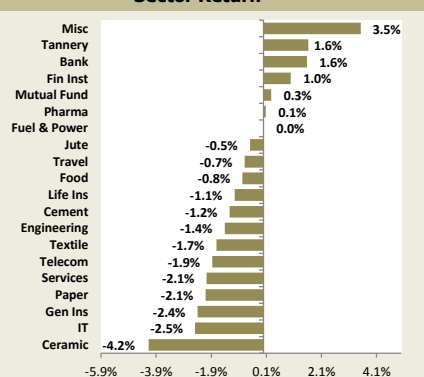
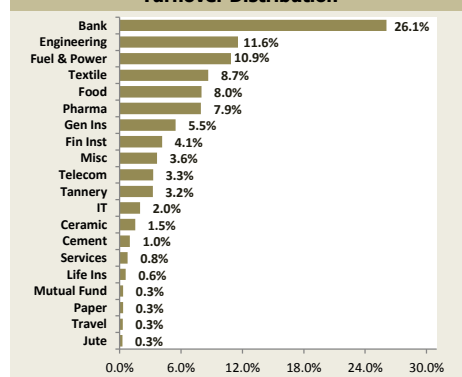
TODAY'S WORLD STOCK INDICES

	Value	Change	% Change
DJIA (USA)	25,554.66	-96.22	-0.38%
FTSE 100 (UK)	7,156.18	5.03	0.07%
SENSEX (India)	37,757.03	221.37	0.59%
STI (Singapore)	3,193.33	-18.92	-0.59%
Nikkei 225 (Japan)	21,290.24	-213.45	-0.99%

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TODAY'S SECTOR MOVEMENT

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	1.6%	1,848.2	26.1%	17.5%	9.6	10.9	1.0
Cement	-1.2%	71.0	1.0%	2.9%	36.8	35.0	2.7
Ceramic	-4.2%	106.5	1.5%	0.9%	25.4	19.7	1.9
Engineering	-1.4%	819.6	11.6%	5.6%	16.7	17.7	1.7
Financial Institutions	1.0%	293.1	4.1%	5.5%	13.8	25.4	1.7
Food & Allied	-0.8%	566.4	8.0%	9.4%	33.7	26.5	7.7
Fuel & Power	0.0%	771.3	10.9%	13.9%	15.0	13.3	1.8
General Insurance	-2.4%	386.7	5.5%	1.4%	15.0	14.5	1.1
IT	-2.5%	141.6	2.0%	0.6%	24.7	21.1	2.6
Jute	-0.5%	18.8	0.3%	0.1%	879.9	82.1	5.6
Life Insurance	-1.1%	41.1	0.6%	1.6%	-	-	-
Miscellaneous	3.5%	258.1	3.6%	3.9%	24.2	33.5	1.4
Mutual Fund	0.3%	24.2	0.3%	1.0%	7.6	13.0	17.0
Paper & Printing	-2.1%	22.7	0.3%	0.4%	19.9	34.9	1.6
Pharma. & Chemicals	0.1%	562.5	7.9%	14.8%	19.6	19.0	2.6
Services & Real Estate	-2.1%	55.1	0.8%	0.5%	16.1	16.9	1.1
Tannery	1.6%	229.2	3.2%	0.8%	19.0	17.4	2.6
Telecommunication	-1.9%	231.4	3.3%	15.1%	19.9	15.3	11.3
Textile	-1.7%	613.4	8.7%	3.8%	17.7	17.3	1.0
Travel & Leisure	-0.7%	20.2	0.3%	0.6%	31.5	23.6	0.6

Sector Return

Turnover Distribution

TOP GAINERS

Ticker	Price (BDT)	Change**	Forward P/E*
DUTCHBANGL	217.7	15.2%	10.4
KAY&QUE	220.7	8.7%	367.8
UTTARABANK	31.3	8.3%	9.0
LIBRAINFU	1,017.1	7.5%	n/a
VAMLBDMF1	7.9	6.8%	8.2
NLI1STMF	13.6	6.3%	13.3
BERGERPBL	2,068.7	6.2%	58.2
MARICO	1,547.8	5.6%	23.5
BIFC	5.9	5.4%	n/a
RUPALIBANK	45.7	5.3%	68.6

TOP LOSERS

Ticker	Price (BDT)	Change**	Forward P/E*
REPUBLIC	22.9	-9.1%	13.0
MONNOCERA	336.8	-8.8%	20.7
SAFKOSPINN	22.0	-7.9%	110.0
NFML	9.3	-7.0%	n/a
PRIMEINSUR	16.1	-6.4%	14.4
ALLTEX	11.8	-6.3%	n/a
TAKAFULINS	36.4	-6.2%	26.8
RUPALIINS	19.9	-6.1%	8.8
FEDERALINS	10.9	-6.0%	19.9
PURABIGEN	15.9	-5.9%	15.1

TOP TURNOVER^o (BDT mn)

Ticker	Price (BDT)	Turnover	% Turnover
DUTCHBANGL	217.7	624.0	8.8%
BATBC	4,549.4	480.7	6.8%
UPGDCL	403.8	471.1	6.7%
BRACBANK	84.1	237.7	3.4%
UTTARABANK	31.3	200.3	2.8%
SHAHJABANK	27.3	163.1	2.3%
SINGERBD	271.9	162.9	2.3%
FORTUNE	35.1	141.2	2.0%
BSCL	158.1	128.6	1.8%
MONNOSTAF	1,684.8	123.3	1.7%

TOP MKT CAP (BDT mn)

Ticker	Price (BDT)	M. Cap	% M.Cap
GP	385.5	520,541	14.3%
BATBC	4,549.4	272,964	7.5%
SQURPHARMA	266.4	210,192	5.8%
UPGDCL	403.8	193,455	5.3%
BERGERPBL	2,068.7	95,942	2.6%
RENATA	1,174.8	94,613	2.6%
BRACBANK	84.1	92,273	2.5%
ICB	122.0	85,116	2.3%
LHBL	45.0	52,262	1.4%
MARICO	1,547.8	48,756	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; ^oTurnover includes block trade

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