

TODAY'S MARKET REVIEW

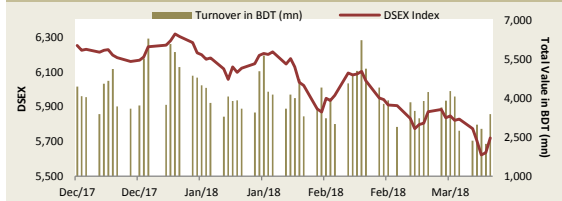
The stock market witnessed a sparkling session today. The prime index posted the second highest single-day return till date in 2018 amid increased participation of the investors. The expectant investors took position on the lucrative price level in different stocks, especially on bank and financial institution sectors that spurred the bourse to nudge higher. Apart from this, mutual fund, engineering, telecom, fuel & power and pharmaceutical sectors also observed buoyancy in today's session. The top gainers list was dominated by mutual fund sector's stocks while the losers list was dominated by small cap stocks. Trading activities has increased by 51% over last session, where top ten traded stocks grabbed 38.3% of total turnover. At the day's end, DSEX, DS30 and DSES surged by 85.5 points, 25.1 points and 10.6 points respectively to their previous day's level.

All the sectors edged higher in the day's session. Among the major sectors based on market capitalization - bank (3.0%), mutual fund (2.7%), financial institution (1.9%), engineering (1.3%), telecom (0.7%), fuel & power (0.6%) and pharmaceutical (0.6%) sectors achieved price appreciation in the day's session. The investors' activity was mostly centered on bank (25.1%), engineering (13.3%) and textile (11.7%) sectors while BRACBANK (7.2%), MERCANBANK (4.9%) and IFADAUTOS (4.7%) led the scrip wise turnover board today.

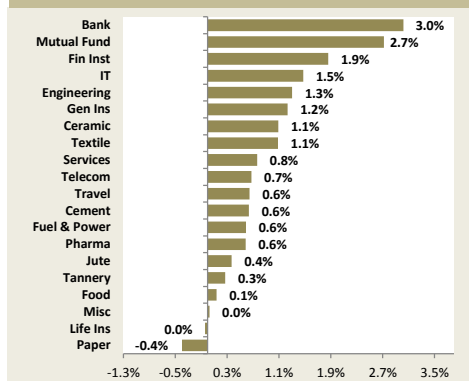
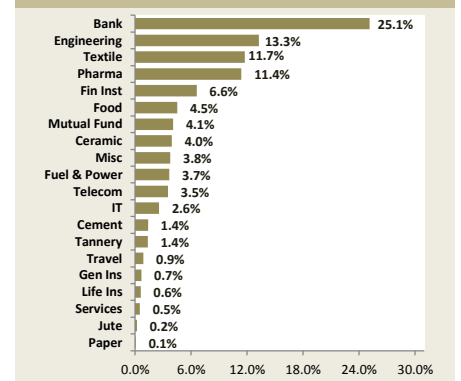
The port city bourse CSE surged by 232.17 points in its broad based index -CASPI.

TODAY'S MARKET SUMMARY

	Today	Yesterday	Change	%
DSEX	5,721	5,635	85.5	1.5%
DS30	2,116	2,091	25.1	1.2%
DSES	1,349	1,338	10.6	0.8%
Market Cap (BDT bn)	4,008	3,969	39.3	1.0%
Turnover (BDT mn)	3,386	2,241	1,145.1	51%
Volume (mn)	106	68	38.1	56%
No of Issues Advanced	275	193		
No of Issues Declined	43	92		
Issues Unchanged	18	49		
Market Trailing P/E	16.9	16.7		
Market Forward P/E	16.4	16.2		

3-MONTHS MARKET MOVEMENT

TODAY'S SECTOR MOVEMENT

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	3.1%	442.4	15.7%	18.1%	9.4	9.9	1.0
Cement	0.6%	44.1	1.6%	3.5%	21.7	46.8	3.2
Ceramic	1.1%	143.5	5.1%	0.8%	26.8	21.8	1.8
Engineering	1.3%	366.2	13.0%	5.5%	21.4	19.1	1.8
Financial Institutions	1.9%	146.4	5.2%	6.1%	16.5	14.4	1.7
Food & Allied	0.1%	186.4	6.6%	8.3%	29.2	27.9	7.7
Fuel & Power	0.6%	155.7	5.5%	10.3%	12.3	11.5	1.4
General Insurance	1.2%	33.6	1.2%	1.2%	13.1	11.8	0.9
IT	1.5%	45.6	1.6%	0.4%	24.5	20.3	2.1
Jute	0.4%	7.5	0.3%	0.1%	114.0	427.6	2.2
Life Insurance	0.0%	24.1	0.9%	1.4%	n/a	n/a	n/a
Miscellaneous	0.0%	115.6	4.1%	2.7%	21.2	25.9	1.1
Mutual Fund	2.7%	43.7	1.5%	1.2%	9.4	11.0	25.9
Paper & Printing	-0.4%	3.3	0.1%	0.1%	n/a	n/a	1.1
Pharma. & Chemicals	0.6%	295.6	10.5%	15.7%	21.6	19.4	2.9
Services & Real Estate	0.8%	23.3	0.8%	0.6%	16.6	16.8	1.2
Tannery	0.3%	69.3	2.5%	0.8%	19.3	17.2	2.7
Telecommunication	0.7%	160.2	5.7%	19.3%	29.2	24.3	16.2
Textile	1.1%	479.0	17.0%	3.3%	17.3	16.0	0.9
Travel & Leisure	0.6%	37.6	1.3%	0.7%	39.9	30.0	0.7

Sector Return

Turnover Distribution

DSE NEWS IN BRIEF

OIMEX: The Board of Directors has decided to issue 3,50,00,000 Non-Convertible Preference shares of Tk. 10.00 each totaling to Tk. 35.00 crore only to strengthen the Tier-II Capital of the Company. The Board has also decided to increase Authorized Capital of the Company from Tk.100.00 crore to Tk. 120.00 crore and Authorized Capital (Preference Shares) by Tk. 50.00 crore following necessary amendments to relevant clauses/articles of the Memorandum and Articles of Association of the Company subject to approval from the respective Regulatory authorities and shareholders at the EGM. Date of EGM: 06.05.2018, Venue: notified later on. Record Date for EGM: 05.04.2018.

UPCOMING DIVIDENDS/ RIGHTS OFFERINGS

Ticker	Record Date	Date of AGM	Declaration
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%C
NITOLINS	29.03.2018	08.05.2018	14%B
VAMLRBBF	29.03.2020	-	12%C
DBH	29.03.2018	26.04.2018	30%C

TODAY'S WORLD STOCK INDICES

	Value	Change	% Change
DJIA (USA)	24,758.12	-248.91	-1.00%
FTSE 100 (UK)	7,132.69	-6.09	-0.09%
SENSEX (India)	33,798.89	-36.85	-0.11%
STI (Singapore)	3,527.59	-11.82	-0.33%
Nikkei 225 (Japan)	21,803.95	26.66	0.12%

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

TOP GAINERS

Ticker	Price (BDT)	Change**	Forward P/E*
ISLAMICFIN	18.1	9.7%	10.0
CAPMBDBLMF	9.2	9.5%	5.1
CAPMIBBLMF	12.7	9.5%	n/a
SEMILIBLSF	7.0	9.4%	35.0
MERCANBANK	21.6	8.5%	5.6
CITYBANK	39.6	8.5%	9.6
ICBEPMF1S1	7.1	7.6%	8.1
ILFSL	17.0	6.3%	23.6
GREENDELTA	60.0	6.2%	19.9
1STPRIMFMF	12.9	5.7%	11.0

TOP TURNOVER° (BDT mn)

Ticker	Price (BDT)	Turnover	% Turnover
BRACBANK	89.4	242.5	7.2%
MERCANBANK	21.6	164.5	4.9%
IFADAUTOS	121.2	159.7	4.7%
QUEENSOUTH	34.0	149.3	4.4%
SQURPHARMA	315.3	129.9	3.8%
MONNOCERA	137.5	116.5	3.4%
GP	482.1	113.9	3.4%
LANKABAFIN	30.3	91.4	2.7%
CITYBANK	39.6	70.6	2.1%
DHAKABANK	17.1	57.8	1.7%

TOP LOSERS

Ticker	Price (BDT)	Change**	Forward P/E*
FIRSTFIN	10.3	-3.7%	n/a
PHENIXINS	25.1	-3.5%	8.3
NCCBLMF1	8.0	-2.4%	35.3
CENTRALINS	20.1	-2.4%	9.4
AGRANINS	18.7	-2.1%	10.0
ICBIBANK	5.4	-1.8%	n/a
UNITEDINS	26.6	-1.5%	12.2
BERGERPBL	2,119.9	-1.4%	32.8
FAREASTLIF	71.2	-1.4%	n/a
RECKITTEN	1,741.9	-1.3%	28.2

TOP MKT CAP (BDT mn)

Ticker	Price (BDT)	M. Cap	% M.Cap
GP	482.1	650,980	18.8%
SQURPHARMA	315.3	232,499	6.7%
BATBC	3,511.2	210,672	6.1%
RENATA	1,268.3	88,820	2.6%
ICB	132.9	88,306	2.6%
BRACBANK	89.4	78,470	2.3%
LHBL	56.7	65,850	1.9%
OLPGDCL	159.9	63,838	1.8%
OLYMPIC	265.9	53,164	1.5%
BERGERPBL	2,119.9	49,158	1.4%

Source: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; ILS Research Team

* Based on current outstanding no. of shares; **No. of shares adjusted on record date; °Turnover includes block trade

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