

TODAY'S MARKET REVIEW

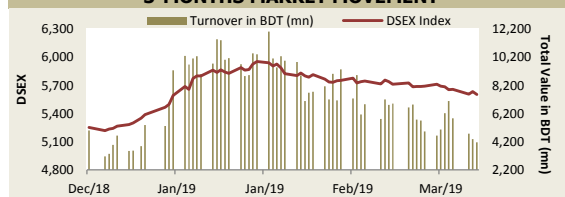
The stock market came back to the red after a single session break amid low participation of the shaky investors. The market started with upbeat note but within half an hour the index exhibited a sharp fall. Though some reversal attempts were observed in the middle of the session, last hour sell pressure pushed down the index further. Selling of shares was observed mostly in bank, financial institution, textile, food, fuel & power and engineering sectors which laid down the prime index by 31 points. The opportunist investors exposed their buying interest on telecom, pharma and cement sectors in expectation of better return. Trading activities have decreased by 5.3% over last session which was the lowest in this year as most of the investors adopted 'wait and see' stance. The bank sector continued to dominate the turnover board and grabbed 16.5% of the day's turnover. The insurance sector's stocks topped the losers list where the top ten traded stocks comprised of large cap stocks. At the day's end, the DSEX, DSES and DS30 lost 30.7 points, 3.2 and 9.1 points respectively to their previous day's level.

Most of the sectors witnessed correction today. Among the major sectors based on market capitalization – bank (-1.4%), financial institution (-1.4%), textile (-1.0%), food (-0.7%), fuel & power (-0.2%) and engineering (-0.2%) sectors witnessed price correction while telecom (0.8%), pharma (0.4%) and cement (0.3%) sectors achieved price appreciation in the day's session. The investors' activity was mostly centered on bank (16.5%), pharma (14.6%) and engineering (12.9%) sectors while BATBC (6.0%), GP (5.1%) and BRACBANK (4.8%) led the scrip wise turnover board today.

The port city bourse CSE decreased by 42.3 points in its broad based index – CASPI.

TODAY'S MARKET SUMMARY

	Today	Yesterday	Change	%
DSEX	5,601	5,631	(30.7)	-0.5%
DS30	2,006	2,015	(9.1)	-0.5%
DSES	1,290	1,293	(3.2)	-0.2%
Market Cap (BDT bn)	4,164	4,177	(13.7)	-0.3%
Turnover (BDT mn)	4,147	4,378	(231.1)	-5.3%
Volume (mn)	79	87	(8.5)	-9.8%
No of Issues Advanced	101	233		
No of Issues Declined	193	81		
Issues Unchanged	51	32		
Market Trailing P/E	16.3	16.3		
Market Forward P/E	16.4	16.4		

3-MONTHS MARKET MOVEMENT

UPCOMING IPOs

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

DSE NEWS IN BRIEF

SHURWID: The Company has informed that the Board of Directors has decided that the company will do the business of Information Technology Enabled Service (ITES) which is fully Tax exempted up to June 2024 as per 6th Schedule, Part- A, Para- 33 of the Income Tax Ordinance, 1984, and an agreement was signed with the company and Amarron.com for service providing and profit sharing between the companies from the clients using promo-code.

UPCOMING DIVIDENDS/ RIGHTS OFFERINGS

Ticker	Record Date	Date of AGM	Declaration
GLAXOSMITH	21.03.2019	25.04.2019	530%C
SINGERBD	24.03.2019	23.04.2019	30%B
LINDEBD	25.03.2019	30.04.2019	375%C

TODAY'S WORLD STOCK INDICES

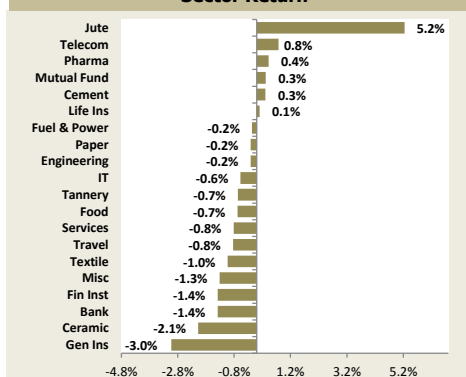
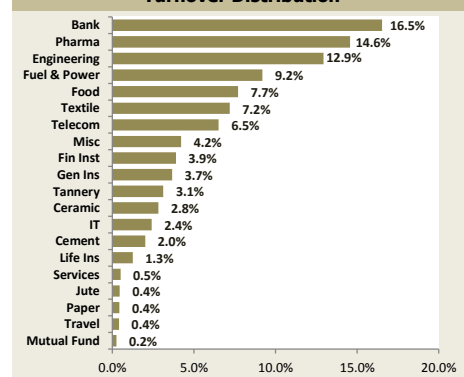
	Value	Change	% Change
DJIA (USA)	25,887.38	-26.72	-0.10%
FTSE 100 (UK)	7,316.68	-7.32	-0.10%
SENSEX (India)	38,437.48	74.01	0.19%
STI (Singapore)	3,208.72	-12.20	-0.38%
Nikkei 225 (Japan)	21,608.92	42.07	0.20%

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TODAY'S SECTOR MOVEMENT

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	-1.4%	685.8	16.5%	17.3%	9.5	10.8	1.0
Cement	0.3%	83.2	2.0%	2.9%	36.9	35.1	2.8
Ceramic	-2.1%	116.7	2.8%	0.8%	24.8	19.3	1.8
Engineering	-0.2%	536.3	12.9%	5.5%	16.4	17.3	1.6
Financial Institutions	-1.4%	161.3	3.9%	5.4%	13.6	24.9	1.7
Food & Allied	-0.7%	319.2	7.7%	9.6%	34.4	27.0	7.9
Fuel & Power	-0.2%	381.2	9.2%	13.8%	14.8	13.1	1.8
General Insurance	-3.0%	151.9	3.7%	1.3%	13.8	13.4	1.0
IT	-0.6%	99.9	2.4%	0.6%	23.9	20.4	2.5
Jute	5.2%	18.5	0.4%	0.1%	911.2	85.1	5.8
Life Insurance	0.1%	51.9	1.3%	1.5%	-	-	-
Miscellaneous	-1.3%	174.7	4.2%	3.7%	22.9	31.8	1.4
Mutual Fund	0.3%	10.2	0.2%	1.0%	7.5	12.9	16.8
Paper & Printing	-0.2%	17.5	0.4%	0.4%	18.9	33.1	1.5
Pharma. & Chemicals	0.4%	604.2	14.6%	15.1%	19.8	19.3	2.6
Services & Real Estate	-0.8%	20.5	0.5%	0.5%	15.8	16.6	1.0
Tannery	-0.7%	129.1	3.1%	0.8%	18.6	17.0	2.5
Telecommunication	0.8%	270.0	6.5%	15.4%	20.3	15.7	11.6
Textile	-1.0%	298.3	7.2%	3.7%	17.2	16.8	1.0
Travel & Leisure	-0.8%	16.5	0.4%	0.6%	31.2	23.3	0.6

Sector Return

Turnover Distribution

TOP GAINERS

Ticker	Price (BDT)	Change**	Forward P/E*
PREMIERCEM	77.5	7.3%	22.3
NORTHERN	1,241.5	6.2%	56.0
MARICO	1,681.7	5.9%	25.5
IMAMBUTTON	19.5	5.4%	n/a
RECKITTBN	3,486.9	5.0%	62.4
LIBRAINFU	1,011.4	4.3%	n/a
RANFOUNDRY	164.5	4.3%	37.6
RENWICKJA	1,532.8	3.8%	253.8
SONALIANSJ	522.7	3.8%	653.4
SHYAMPSUG	29.0	3.6%	n/a

TOP LOSERS

Ticker	Price (BDT)	Change**	Forward P/E*
SONARBAINS	49.9	-9.6%	28.4
PROVATIINS	30.1	-9.1%	16.4
EASTERNINS	47.8	-7.9%	18.5
TAKAFULINS	33.2	-7.3%	24.4
UNITEDINS	56.5	-7.2%	25.9
CONTININS	19.2	-6.8%	8.1
ASIAINS	23.8	-6.7%	13.9
SAFKOSPINN	19.5	-6.3%	97.5
GLOBALINS	15.1	-6.2%	25.2
MATINSPINN	38.3	-6.1%	16.8

TOP TURNOVER^o (BDT mn)

Ticker	Price (BDT)	Turnover	% Turnover
BATBC	4,684.1	246.8	6.0%
GP	394.9	209.6	5.1%
BRACBANK	83.2	198.1	4.8%
UPGDCL	401.3	176.6	4.3%
SQRPHARMA	272.2	154.8	3.7%
DUTCHBANGL	210.2	149.4	3.6%
MARICO	1,681.7	132.6	3.2%
SINGERBD	263.8	127.4	3.1%
MONNOCERA	322.6	111.8	2.7%
RECKITTBN	3,486.9	79.9	1.9%

TOP MKT CAP (BDT mn)

Ticker	Price (BDT)	M. Cap	% M.Cap
GP	394.9	533,233	14.8%
BATBC	4,684.1	281,046	7.8%
SQRPHARMA	272.2	214,768	5.9%
UPGDCL	401.3	192,258	5.3%
RENATA	1,175.4	94,662	2.6%
BRACBANK	83.2	91,285	2.5%
BERGERPBL	1,917.6	88,934	2.5%
ICB	120.6	84,140	2.3%
MARICO	1,681.7	52,974	1.5%
LHBL	45.5	52,842	1.5%

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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