

**TODAY'S MARKET REVIEW**

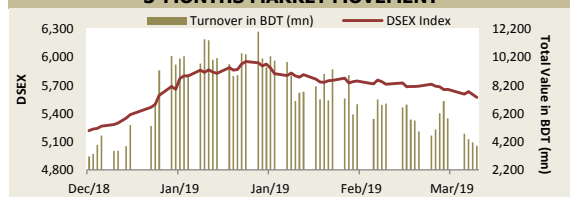
The key index of the country witnessed another downbeat session today in its benchmark index as the risk-averse investors opted to liquidate their portfolios to escape further losses. The market opened with positive vibe, but it did not sustain as the investors went for selling of shares within fifteen minutes of starting which continued till the end. Bank, financial institutions, fuel & power, pharma, food and textile sectors stocks observed liquidation which led the index to close at its lowest till January 2, 2019. However, continued price correction tempted the bargain hunters to take position on the attractive price level in telecom, engineering, jute and general insurance sectors stocks. The trading activities dropped below BDT 4.00 billion which was the lowest since December 26, 2018 as the investors refrained themselves from putting fresh fund amid the ongoing bearish trend of the market. The engineering sector dominated the turnover board and grabbed 16.9% of the day's turnover where SINGERBD topped the turnover list with 6.1% of total turnover. At the day's end, the DSEX, DSES and DS30 lost 30.4 points, 5.3 points and 12.6 points respectively to their previous day's level.

Most of the sectors witnessed correction today. Among the major sectors based on market capitalization – bank (-1.3%), financial institution (-1.0%), fuel & power (-0.8%), pharma (-0.4%), food (-0.3%) and textile (-0.2%) sectors witnessed price correction while telecom (0.4%), engineering (0.3%) and jute (5.5%) sectors achieved price appreciation in the day's session. The investors' activity was mostly centered on engineering (16.9%), bank (12.4%) and pharma (11.4%) sectors while SINGERBD (6.1%), AIL (4.4%) and BATBC (4.4%) 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	5,570	5,601	(30.4)	-0.5%
DS30	1,993	2,006	(12.6)	-0.6%
DSES	1,284	1,290	(5.3)	-0.4%
Market Cap (BDT bn)	4,149	4,164	(14.6)	-0.4%
Turnover (BDT mn)	3,910	4,147	(237.1)	-5.7%
Volume (mn)	73	79	(5.7)	-7.3%
No of Issues Advanced	135	101		
No of Issues Declined	154	193		
Issues Unchanged	56	51		
Market Trailing P/E	16.2	16.3		
Market Forward P/E	16.3	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

**UPCOMING DIVIDENDS/ RIGHTS OFFERINGS**

Ticker	Record Date	Date of AGM	Declaration
ISLAMICFIN	11.04.2019	05.05.2019	10% C & 4.5% S

**SELECTED EARNINGS (EPS) UPDATE (BDT)**

Name	Latest Q	Previous Q	Growth	Q
ISLAMICFIN	1.82	1.81	0.55%	Q4

**DSE NEWS IN BRIEF**

**DOREENPWR:** Credit Rating Information and Services Limited (CRISL) has rated the Company as "AA" in the long term and "ST-2" in the short term along with a stable outlook in consideration of its audited financials up to June 30, 2018, un-audited financials up to December 31, 2018 and other relevant quantitative as well as qualitative information up to the date of rating declaration.

**TODAY'S WORLD STOCK INDICES**

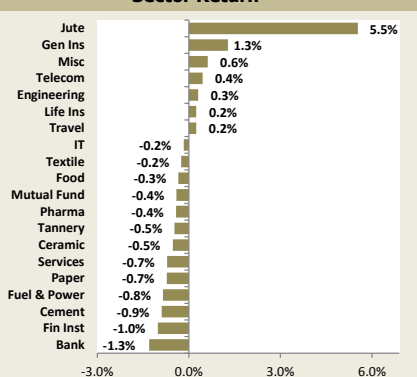
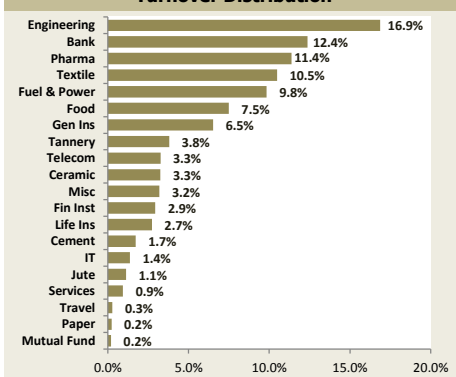
	Value	Change	% Change
DJIA (USA)	25,745.67	-141.71	-0.55%
FTSE 100 (UK)	7,324.13	33.12	0.45%
SENSEX (India)	38,386.75	23.28	0.06%
STI (Singapore)	3,213.10	5.44	0.17%
Nikkei 225 (Japan)	21,608.92	42.07	0.20%

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**TODAY'S SECTOR MOVEMENT**

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	-1.3%	483.6	12.4%	17.2%	9.4	10.6	1.0
Cement	-0.9%	67.7	1.7%	2.9%	36.6	34.8	2.7
Ceramic	-0.5%	127.1	3.3%	0.8%	24.7	19.2	1.8
Engineering	0.3%	659.0	16.9%	5.5%	16.4	17.4	1.6
Financial Institutions	-1.0%	114.8	2.9%	5.4%	13.4	24.3	1.7
Food & Allied	-0.3%	293.1	7.5%	9.6%	34.3	26.9	7.9
Fuel & Power	-0.8%	384.6	9.8%	13.7%	14.6	13.0	1.8
General Insurance	1.3%	254.6	6.5%	1.3%	14.0	13.6	1.0
IT	-0.2%	53.7	1.4%	0.6%	23.9	20.4	2.5
Jute	5.5%	44.5	1.1%	0.1%	961.6	89.8	6.1
Life Insurance	0.2%	106.6	2.7%	1.6%	-	-	-
Miscellaneous	0.6%	125.1	3.2%	3.7%	23.1	32.0	1.4
Mutual Fund	-0.4%	7.4	0.2%	1.0%	7.5	12.8	16.7
Paper & Printing	-0.7%	8.9	0.2%	0.4%	18.8	32.9	1.5
Pharma & Chemicals	-0.4%	444.4	11.4%	15.1%	19.8	19.2	2.6
Services & Real Estate	-0.7%	36.7	0.9%	0.5%	15.7	16.5	1.0
Tannery	-0.5%	148.4	3.8%	0.8%	18.5	16.9	2.5
Telecommunication	0.4%	127.5	3.3%	15.6%	20.4	15.7	11.6
Textile	-0.2%	409.7	10.5%	3.7%	17.2	16.8	1.0
Travel & Leisure	0.2%	11.0	0.3%	0.6%	31.2	23.4	0.6

**Sector Return**

**Turnover Distribution**

**TOP GAINERS**

Ticker	Price (BDT)	Change**	Forward P/E*
AGRANINS	30.3	9.8%	20.3
PROGRESLIF	85.2	9.2%	n/a
JMISMDL	327.0	8.7%	59.7
SONALIANS	561.9	7.5%	702.4
AMBEEPCHA	671.7	7.5%	198.7
BDAUTOCA	230.8	7.3%	180.3
FINEFOODS	39.4	6.5%	597.0
EASTRNLUB	1,467.6	6.2%	245.4
RENWICKJA	1,627.6	6.2%	269.5
SAMATALETH	59.7	6.0%	2,985.0

**TOP LOSERS**

Ticker	Price (BDT)	Change**	Forward P/E*
BIFC	5.5	-5.2%	n/a
STANDARINS	34.5	-3.9%	15.7
UNITEDINS	54.3	-3.9%	24.9
SIMTEX	26.5	-3.6%	12.9
PF1STMF	5.7	-3.4%	11.4
UNITEDFIN	18.2	-3.2%	12.3
GRAMEENS2	12.6	-3.1%	15.4
BSCL	143.7	-3.0%	50.2
n/a	16.0	-3.0%	n/a
ALARABANK	20.2	-2.9%	20.5

**TOP TURNOVER<sup>o</sup> (BDT mn)**

Ticker	Price (BDT)	Turnover	% Turnover
SINGERBD	268.9	238.5	6.1%
AIL	70.6	171.4	4.4%
BATBC	4,658.1	170.2	4.4%
BRACBANK	81.7	147.3	3.8%
UPGDCL	397.4	124.2	3.2%
MONNOCERA	317.1	123.5	3.2%
GP	397.3	77.8	2.0%
DUTCHBANGL	205.9	76.8	2.0%
RUPALILIFE	101.5	70.0	1.8%
SHURWID	38.2	69.9	1.8%

**TOP MKT CAP (BDT mn)**

Ticker	Price (BDT)	M. Cap	% M.Cap
GP	397.3	536,474	14.9%
BATBC	4,658.1	279,486	7.8%
SQURPHARMA	269.9	212,953	5.9%
UPGDCL	397.4	190,389	5.3%
RENATA	1,174.2	94,565	2.6%
BERGERPBL	1,937.9	89,876	2.5%
BRACBANK	81.7	89,640	2.5%
ICB	119.2	83,163	2.3%
MARICO	1,655.1	52,136	1.4%
LHBL	44.5	51,681	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; <sup>o</sup>Turnover includes block trade

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