

# **Daily Market Update**

Market closed in red today. The benchmark index DSEX (- Sector 0.24%) lost 12.69 points and closed at 5,335.38 points today. The blue-chip index DS30 (-0.53%) and shariah based index DSES (-0.16%) both closed in red. The Large cap sectors showed negative performance today except Food & Allied (+0.60%). Power posted the highest loss of 0.91% followed by  $\frac{1}{T_{ele}}$ NBFIs (-0.83%), Telecommunication (-0.40%), Engineering (-0.33%), Pharmaceuticals (-0.32%) & Banks (-0.04%). Total Fuel turnover stood at BDT 7.2 billion (USD 86.2 million). BBS Cem Cables Limited (+1.8%) was the most traded share with a turnover of BDT 290.6 million.

4500 DSEX

4000 3500

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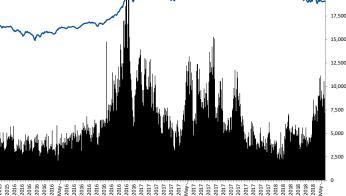
500

Top Ten Gainers	Close	Δ%	Turnover (mn BDT)	- IT
Global Heavy Chemicals Limited	51.80	10.0%	86.74	Texti
IT Consultants Limited	53.20	9.9%	148.1	Paper
Dragon Sweater & Spinning Ltd.	41.20	9.9%	143.7	Tann
Dulamia Cotton	29.10	9.8%	1.4	
Standard Insurance	22.40	9.8%	4.8	Jute
Padma Islami Life Insurance Limited	39.30	9.8%	67.8	Cerar
Khulna Printing & Packaging Limited	18.40	9.5%	28.4	Misce
Prime Islami Life Ins	49.00	9.4%	6.7	7000
AFC Agro Biotech Ltd.	43.60	8.2%	48.5	
Saiham Textile	23.90	8.1%	67.1	6500

Top Ten Losers	Close	Δ%	Turnover (mn BDT)
Meghna Condensed Milk	18.90	-10.0%	1.42
Meghna Pet Industries	16.30	-9.9%	2.0
Shaympur Sugar	35.80	-8.7%	.9
BD Autocars	339.00	-5.5%	99.6
BD Finance	12.90	-5.1%	10.0
Shasha Denim Limited	62.60	-5.0%	102.5
Jute Spinners	120.10	-4.8%	2.1
Apex Tannery	180.30	-4.8%	49.5
NCC Bank	13.10	-4.4%	3.3
ICB Islamic Bank	4.50	-4.3%	1.9

Most Traded Share	Close	Δ%	Turnover (mn BDT)
BBS Cables Limited	104.70	1.8%	290.6
Nahee Aluminium Composite Panel Ltd.	59.70	6.0%	249.8
KDS Accessories Limited	113.90	-2.5%	217.8
The Peninsula Chittagong Limited	37.80	4.1%	187.8
Bashundhara Paper Mills Limited	136.50	-3.1%	149.3
IT Consultants Limited	53.20	9.9%	148.1
Aman Feed Limited	67.40	4.2%	143.9
Dragon Sweater & Spinning Ltd.	41.20	9.9%	143.7
Paramount Textile Limited	63.00	2.3%	139.2
Monno Ceramic	363.10	-1.2%	137.9

Sector Index         Closing         Opening $\Delta$ (Pts) $\Delta$ %         No. of Cos         Sector Index         Sector Intermove $%$ of Total Humover           Banks         1,306.30         1,306.84         -0.54         -0.04%         30         533,020.9         16.18% $300.9$ 4.46%           Nutual Funds         742.97         741.85         1.12         0.15%         37         336550         1.21%         25.2         0.33%           General Insurance         1,346.99         1,343.74         3.25         0.24%         35         36610.3         1.11%         25.6         0.33%           Ide Insurance         1,747.68         1,712.66         35.03         2.05%         12         48,727.9         1.48%         156.0         2.31%           Telecommunication         5,443.12         5,465.21         -22.09         -0.40%         2         547,071.0         16.61%         63.4         0.94%           General Insurance         1,747.08         1,718.68         -10.25         -0.33%         2         55.5         131%         299.8         4.44%           Engineering         3,137.42         3,147.68         -10.25         -0.33%         36         205,537.6													
$ \begin{array}{c c c c c c c c c c c c c c c c c c c $	-	Sector Index	Closing	Opening	Δ(Pts)	Δ%	No. of Cos	Sectoral Mcap	% of Total Mcap	Sectoral Tu	rnover	% of Total	Turnover
$ \begin{array}{c c c c c c c c c c c c c c c c c c c $		Banks	1,306.30	1,306.84	-0.54	-0.04%	30	533,020.9	16.18%	300.9	)	4.46	5%
$ \begin{array}{c c c c c c c c c c c c c c c c c c c $	c	NBFIs	2,151.44	2,169.45	-18.00	-0.83%	23	193,507.7	5.88%	138.4	ŀ	2.05	5%
Life Insurance 1,747.68 1,712.66 35.03 2.05% 12 48,727.9 1.48% 156.0 2.31% Telecommunication 5,443.12 5,465.21 -22.09 -0.40% 2 547,071.0 16.61% 63.4 0.94% Pharmaceuticals 2,692.05 2,700.59 -8.54 -0.32% 29 506,543.6 15.38% 826.4 12.25% Fuel & Power 1,702.98 1,718.68 -15.70 -0.91% 19 422,141.3 12.82% 385.5 5.71% Cement 1,923.92 1,941.21 -17.30 -0.89% 7 117,002.0 3.55% 59.0 0.88% Services & Real Estate 1,110.36 1,125.76 -15.40 -1.37% 8 43,156.5 1.31% 299.8 4.44% Engineering 3,137.42 3,147.68 -10.25 -0.33% 36 205,537.6 6.24% 1,821.9 27.01% Food & Allied 14,046.96 13,962.87 84.10 0.60% 17 258,632.2 7.85% 220.9 3.28% T T 1,609.97 1,572.49 37.48 2.38% 8 17,800.1 0.54% 339.1 5.03% Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% Tannery 2,693.88 2,693.20 0.69 0.03% 6 28,133.5 0.85% 181.0 2.668% Jute 7,198.77 7,244.15 -45.37 -0.63% 3 1,591.0 0.05% 18.6 0.28% Ceramics 664.15 669.62 -5.47 -0.82% 5 31,894.4 0.97% 162.7 2.41% Miscellaneous 2,022.58 2,028.63 -6.05 -0.30% 12 108,094.3 3.28% 564.7 8.37%		Mutual Funds	742.97	741.85	1.12	0.15%	37	39,855.0	1.21%	25.2		0.37	7%
$ \begin{array}{c c c c c c c c c c c c c c c c c c c $	, ,	General Insurance	1,346.99	1,343.74	3.25	0.24%	35	36,610.3	1.11%	25.6		0.38	8%
$ \begin{array}{c c c c c c c c c c c c c c c c c c c $	1	Life Insurance	1,747.68	1,712.66	35.03	2.05%	12	48,727.9	1.48%	156.0	)	2.31	%
Fuel & Power 1,702.98 1,718.68 -15.70 -0.91% 19 422,141.3 12.82% 385.5 5.71% Cement 1,923.92 1,941.21 -17.30 -0.89% 7 117,002.0 3.55% 59.0 0.88% Services & Real Estate 1,110.36 1,125.76 -15.40 -1.37% 8 43,156.5 1.31% 299.8 4.44% Engineering 3,137.42 3,147.68 -10.25 -0.33% 36 205,537.6 6.24% 1,821.9 27.01% Food & Allied 14,046.96 13,962.87 84.10 0.60% 17 258,632.2 7.85% 220.9 3.28% 7 Textiles 1,302.67 1,296.78 5.89 0.45% 49 127,926.8 3.88% 977.9 14.50% Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% 7 Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% 7 Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% 7 Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% 7 Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% 7 Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% 7 Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% 7 Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 126,113.4 0.79% 178.7 2.65% 7 Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% 7 Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 5 31,894.4 0.97% 162.7 2.41% 15 -45.37 -0.63% 3 1,591.0 0.05% 18.6 0.28% 181.0 2.68% 198.0 0.28% 198.0 0.54% 181.0 2.68% 198.0 0.28% 198.0 0.28% 198.0 0.28% 198.0 0.28% 198.0 0.28% 198.0 0.28% 198.0 0.05\% 18.6 0.28% 198.0 0.28% 198.0 0.28% 198.0 0.28% 198.0 0.05\% 18.6 0.28% 198.0 0.28% 198.0 0.05\% 18.6 0.28% 198.0 0.28% 198.0 0.05\% 186.0 0.28% 198.0 0.05\% 186.0 0.28% 198.0 0.28% 198.0 0.28% 198.0 0.05\% 186.0 0.28% 198.0 0.28% 198.0 0.05\% 186.0 0.28% 198.0 0.28% 198.0 0.05\% 186.0 0.28% 198.0 0.28\% 198.0 0.28\% 198.0 0.28\%	/	Telecommunication	5,443.12	5,465.21	-22.09	-0.40%	2	547,071.0	16.61%	63.4		0.94	4%
$ \begin{array}{c c c c c c c c c c c c c c c c c c c $	-	Pharmaceuticals	2,692.05	2,700.59	-8.54	-0.32%	29	506,543.6	15.38%	826.4	ŀ	12.25	5%
Services & Real Estate 1,110.36 1,125.76 -15.40 -1.37% 8 43,156.5 1.31% 299.8 4.44% Engineering 3,137.42 3,147.68 -10.25 -0.33% 36 205,537.6 6.24% 1,821.9 27.01% Food & Allied 14,046.96 13,962.87 84.10 0.60% 17 258,632.2 7.85% 220.9 3.28% IT 1,609.97 1,572.49 37.48 2.38% 8 17,800.1 0.54% 339.1 5.03% Textiles 1,302.67 1,296.78 5.89 0.45% 49 127,926.8 3.88% 977.9 14.50% Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% Tannery 2,693.88 2,693.20 0.69 0.03% 6 28,133.5 0.85% 181.0 2.68% Jute 7,198.77 7,244.15 -45.37 -0.63% 3 1,591.0 0.05% 18.6 0.28% Ceramics 664.15 669.62 -5.47 -0.82% 5 31,894.4 0.97% 162.7 2.41% Miscellaneous 2,022.58 2,028.63 -6.05 -0.30% 12 108,094.3 3.28% 564.7 8.37% Tomoset (807)	I	Fuel & Power	1,702.98	1,718.68	-15.70	-0.91%	19	422,141.3	12.82%	385.5	;	5.71	%
Engineering 3,137.42 3,147.68 -10.25 -0.33% 36 205,537.6 6.24% 1,821.9 27.01% Food & Allied 14,046.96 13,962.87 84.10 0.60% 17 258,632.2 7.85% 220.9 3.28% TT 1,609.97 1,572.49 37.48 2.38% 8 17,800.1 0.54% 339.1 5.03% Textiles 1,302.67 1,296.78 5.89 0.45% 49 127,926.8 3.88% 977.9 14.50% Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% Tannery 2,693.88 2,693.20 0.69 0.03% 6 28,133.5 0.85% 181.0 2.68% Jute 7,198.77 7,244.15 -45.37 -0.63% 3 1,591.0 0.05% 18.6 0.28% Ceramics 664.15 669.62 -5.47 -0.82% 5 31,894.4 0.97% 162.7 2.41% Miscellaneous 2,022.58 2,028.63 -6.05 -0.30% 12 108,094.3 3.28% 564.7 8.37% Tannery $\frac{700}{500}$ $\frac{700}{5$	;	Cement	1,923.92	1,941.21	-17.30	-0.89%	7	117,002.0	3.55%	59.0		0.88	8%
Food & Allied 14,046.96 13,962.87 84.10 0.60% 17 258,632.2 7.85% 220.9 3.28% Food & Allied 14,046.96 13,962.87 84.10 0.60% 17 258,632.2 7.85% 220.9 3.28% TT 1,609.97 1,572.49 37.48 2.38% 8 17,800.1 0.54% 339.1 5.03% Textiles 1,302.67 1,296.78 5.89 0.45% 49 127,926.8 3.88% 977.9 14.50% Paper & Printing 13,645.72 13,998.14 -352.42 -2.52% 2 26,113.4 0.79% 178.7 2.65% Tannery 2,693.88 2,693.20 0.69 0.03% 6 28,133.5 0.85% 181.0 2.68% Jute 7,198.77 7,244.15 -45.37 -0.63% 3 1,591.0 0.05% 18.6 0.28% Ceramics 664.15 669.62 -5.47 -0.82% 5 31,894.4 0.97% 162.7 2.41% Miscellaneous 2,022.58 2,028.63 -6.05 -0.30% 12 108,094.3 3.28% 564.7 8.37% DSEX & Turnover $\frac{700}{500}$	I	Services & Real Estate	1,110.36	1,125.76	-15.40	-1.37%	8	43,156.5	1.31%	299.8	}	4.44	1%
$\frac{1}{10} \text{ Tr} = 1,609.97 + 1,572.49 + 37.48 + 2.38\% + 8 + 17,800.1 + 0.54\% + 339.1 + 5.03\% + 14.50\% + 1302.67 + 1,296.78 + 5.89 + 0.45\% + 49 + 127,926.8 + 3.88\% + 977.9 + 14.50\% + 14.50\% + 14.50\% + 14.50\% + 1302.67 + 13,998.14 + -352.42 + 2.52\% + 2 + 2.65\% + 126.5\% + 181.0 + 2.65\% + 126.5\% + 126$		Engineering	3,137.42	3,147.68	-10.25	-0.33%	36	205,537.6	6.24%	1,821.	9	27.0	1%
$ \begin{array}{c c c c c c c c c c c c c c c c c c c $		Food & Allied	14,046.96	13,962.87	84.10	0.60%	17	258,632.2	7.85%	220.9	)	3.28	8%
Paper & Printing       13,645.72       13,998.14       -352.42       -2.52%       2       26,113.4       0.79%       178.7       2.65%         Tannery       2,693.88       2,693.20       0.69       0.03%       6       28,133.5       0.85%       181.0       2.68%         Jute       7,198.77       7,244.15       -45.37       -0.63%       3       1,591.0       0.05%       18.6       0.28%         Ceramics       664.15       669.62       -5.47       -0.82%       5       31,894.4       0.97%       162.7       2.41%         Miscellaneous       2,022.58       2,028.63       -6.05       -0.30%       12       108,094.3       3.28%       564.7       8.37% $\frac{700}{5500}$ $\frac{700}$	-	- IT	1,609.97	1,572.49	37.48	2.38%	8	17,800.1	0.54%	339.1		5.03	8%
Tannery       2,693.88       2,693.20       0.69       0.03%       6       28,133.5       0.85%       181.0       2.68%         Jute       7,198.77       7,244.15       -45.37       -0.63%       3       1,591.0       0.05%       186.       0.28%         Ceramics       664.15       669.62       -5.47       -0.82%       5       31,894.4       0.97%       162.7       2.41%         Miscellaneous       2,022.58       2,028.63       -6.05       -0.30%       12       108,094.3       3.28%       564.7       8.37% $7000_{5500}_{5500}_{5500}_{5500}_{5500}_{500}_{5500$	I)	Textiles	1,302.67	1,296.78	5.89	0.45%	49	127,926.8	3.88%	977.9	)	14.5	0%
$ \begin{array}{c c c c c c c c c c c c c c c c c c c $		Paper & Printing	13,645.72	13,998.14	-352.42	-2.52%	2	26,113.4	0.79%	178.7	,	2.65	5%
$\begin{array}{c cccc} Ceramics & 664.15 & 669.62 & -5.47 & -0.82\% & 5 & 31,894.4 & 0.97\% & 162.7 & 2.41\% \\ \hline Miscellaneous & 2,022.58 & 2,028.63 & -6.05 & -0.30\% & 12 & 108,094.3 & 3.28\% & 564.7 & 8.37\% \\ \hline \\ $		Tannery	2,693.88	2,693.20	0.69	0.03%	6	28,133.5	0.85%	181.0	)	2.68	8%
$\underbrace{\text{Miscellaneous}}_{5500} 2,022.58 2,028.63 -6.05 -0.30\% 12 108,094.3 3.28\% 564.7 8.37\%}_{5500} \\ \underbrace{\text{DSEX & Turnover}}_{5500} \\ \underbrace{\text{DSEX & 5,335.38 5,348.07 -12.69 -0.24\% -14.56\%}}_{20,000} \\ \underbrace{\text{DSEX & 5,335.38 -5,348.07 -12.69 -0.24\% -14.56\%}}_{20,000} \\ \underbrace{\text{DSEX & 5,335.38 -5,348.07 -2.03 -0.16\% -16.66\%}}_{20,000} \\ \underbrace{\text{DSEX & 5,335.38 -5,348.07 -12.69 -0.24\% -14.56\%}}_{20,000} \\ \underbrace{\text{DSEX & 5,335.38 -5,348.07 -12.69 -0.24\% -14.56\%}_{20,000} \\ \text{DSEX & 5,335.38 -5,348.07 -$		Jute	7,198.77	7,244.15	-45.37	-0.63%	3	1,591.0	0.05%	18.6		0.28	8%
D         DSEX & Turnover           6000         -           5000         -		Ceramics	664.15	669.62	-5.47	-0.82%	5	31,894.4	0.97%	162.7	,	2.41	.%
DSEX & Turnover         Index         Closing         Opening         Δ(Pts)         Δ%         %ΔΥΤΤ           6000         - </td <td></td> <td>Miscellaneous</td> <td>2,022.58</td> <td>2,028.63</td> <td>-6.05</td> <td>-0.30%</td> <td>12</td> <td>108,094.3</td> <td>3.28%</td> <td>564.7</td> <td>,</td> <td>8.37</td> <td>'%</td>		Miscellaneous	2,022.58	2,028.63	-6.05	-0.30%	12	108,094.3	3.28%	564.7	,	8.37	'%
6500 - 1       Control - 1		7000					<sup>2</sup>		<u>Classica</u>	0	A (D) - )	4.07	0/ 41/71
$\sum_{5500}^{6000} = 0$ $\sum_{5000}^{6000} = 0$		6500 -	_			- A .	- 2		0		. ,		-
DSES 1266 66 1268 70 -2.03 -0.16% -8.92%	n	- 6000 -			m	m.	~	DSEX	,				
5000 - DSES 1,266.66 1,268.70 -2.03 -0.16% -8.92%	J	5500 -		Mon	5		- 2	0,000 DS30	1,902.95	1,913.06	-10.11	-0.53%	-16.66%
		5000 -	المر				- 1	7,500 DSES	1,266.66	1,268.70	-2.03	-0.16%	-8.92%



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Index	Closi	ng Oj	pening	Δ(Pts	s) Δ%	%ΔΥΤD	
DSE <b>X</b>	5,335	.38 5,	348.07	-12.6	9 -0.24%	-14.56%	
DS30	1,902	.95 1,	913.06	-10.1	1 -0.53%	-16.66%	
DSES	1,266	.66 1,2	268.70	-2.03	3 -0.16%	-8.92%	
All Categor		Advanc	ed De	clined	Unchanged	Total	
All Catego	ry	113		185	38	336	
A Category	/ (Equity)	92		146	33	271	
B Category	/ (Equity)	5		9	4	18	
N Category	/ (Equity)	0		5	0	5	
Z Category	(Equity)	16		25	1	42	
Mutual Fu	nds	10		10	13	33	
Corporate	Bonds	0		0	1	1	
Market Sta	ıt	Т	oday	l	Last Day	% Change	
M	Mn BDT		3,853,81	1.3	3,863,741.6	0.20	
Мсар	Mn USD		46,35	58.9	46,478.3	-0.3%	
Turnover Mn BDT Mn USD		7		6.2	8,731.2	-17.99	
				36.2	105.0		
Volume	Mn Shares		16	52.8	194.2	-16.29	
Trade			159,	743	187,466	-14.8%	



#### Important DSE News

#### MIDASFIN

The auditor of the Company has given the following 'Emphasis of Matter' Paragraph in the audit report of the Company for the year ended on 31 December 2017. Emphasis of Matter: We draw attention to the following matters though our opinion is not qualified in respect of the same: We draw attention to Note 16 & 17(a) to the financial statements for the years 2017 and 2016 which describe that the group has transferred an amount of Taka 40.00 million this year and 120.00 million last year to retained earnings from statutory reserve account, which if not been transferred, the balance in retained earnings/ (loss) account would have been Taka (2.40) million instead of existing Taka 157.60 million.

### BATBC

The auditor of the company has given the following 'Emphasis of Matter' paragraph in the audit report of the company for the year ended on 31 December 2017. Emphasis of Matter: We draw attention to Note 39.1 to the financial statements where management outlines a BDT 17,806.00 million retrospective demand by the National Board of Revenue for Value Added Tax and Supplementary Duty on the Company's Pilot and Bristol brands. The matter is currently pending before the Appellate Division of the Supreme Court for hearing. Our Opinion is not qualified in respect of this matter.

# PLFSL

Trading of the shares of the Company will be allowed only in the Spot Market and Block transactions will also be settled as per Spot settlement cycle from 25.07.2018 to 06.08.2018. Trading of the shares of the Company will remain suspended on record date i.e., 07.08.2018.

### RUPALIBANK

Consolidated EPS was Tk. 0.17 for April-June 2018 as against Tk. 0.28 for April-June 2017; Consolidated EPS was Tk. 0.44 for January-June 2018 as against Tk. 0.66 for January-June 2017. Consolidated NOCFPS was Tk. 37.05 for January-June 2018 as against Tk. 93.96 for January-June 2017. Consolidated NAV per share was Tk. 55.02 as on June 30, 2018 and Tk. 44.07 as on December 31, 2017.

# **ISLAMIBANK**

(Q2 Un-audited): Consolidated EPS was Tk. 1.52 for April-June 2018 as against Tk. 1.14 for April-June 2017; Consolidated EPS was Tk. 1.88 for January-June 2018 as against Tk. 1.79 for January-June 2017. Consolidated NOCFPS was Tk. (10.62) for January-June 2018 as against Tk. (14.06) for January -June 2017. Consolidated NAV per share was Tk. 32.42 as on June 30, 2018 and Tk. 30.19 as on June 30, 2017.

# PROVATIINS

(Q2 Un-audited): EPS was Tk. 0.32 for April-June 2018 as against Tk. 0.28 for April-June 2017; EPS was Tk. 0.90 for January-June 2018 as against Tk. 0.84 for January-June 2017. NOCFPS was Tk. 0.45 for January-June 2018 as against Tk. 0.63 for January-June 2017. NAV per share was Tk. 17.74 as on June 30, 2018 and Tk. 17.48 as on June 30, 2017.

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