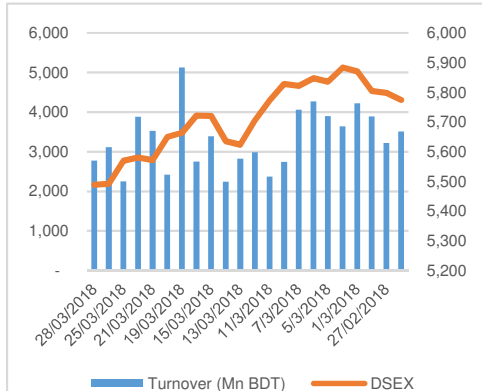


INDEX MOVER				
Company	LTP	YCP	IND.CHG	VOLUME
Positive impact				
BRACBANK	93	91	2.15	1,177,486
CITYBANK	39	38	1.54	1,171,220
EBL	39	38	1.48	115,275
UPGDCL	157	155	1.27	50,312
ICB	122	121	1.11	51,188
Negative impact				
GP	462	467	(12.63)	152,094
SQURPHARMA	305	308	(4.19)	472,110
RENATA	1,231	1,245	(1.70)	137,398
BATBC	3,389	3,405	(1.56)	427
TITASGAS	39	39	(1.16)	305,025

YCP = Yesterday Closing Price LTP = Last Trade Price

DSE in Last 1 Month



Top Gainers (Turnover based)

INSTRUMENT	Price	Value (Mn BDT)	Volume
RENATA	1,231	172	137,398
SQURPHARMA	305	145	472,110
BRACBANK	93	109	1,177,486
GP	461	71	152,094
SALVOCHEM	25	57	2,238,845
IFADAUTOS	117	54	454,531
MERCANBANK	21	46	2,181,016
PHARMAID	436	45	101,991
CITYBANK	39	45	1,171,220
MONNOCERA	134	44	328,589

Market Statistics	
Market Cap (In Mn BDT)	3,872,071
Total Volume (In Mn BDT)	2,774
DSEX	5,489
DSES	1,297
DS-30	2,055
Market P/E	16

Today	% Change
3,872,071	-0.26%
2,774	-10.95%
5,489	-0.05%
1,297	-0.46%
2,055	-0.07%
16	

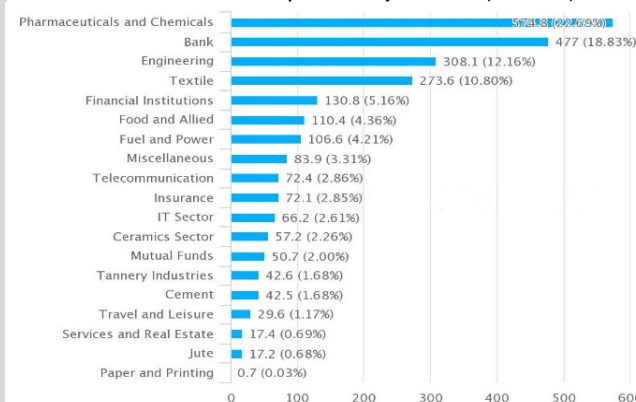
World Markets	
Indices	% Change
NASDAQ	7,009
HANG SENG	30,023
BSE-SENSEX	32,969

Exchange Rates	
Currency	Rates
USD	82.95
GBP	117.37
EUR	102.82

Market Commentary

Today's Market / DSEX (Prime bourse : DSE / Dhaka Stock Exchange Ltd.) ended down 0.05% with 10.95% decline in total turnover. RENATA, SQURPHARMA, BRACBANK, GP, SALVOCHEM stocks dominated today's market turnover. However, CENTRALINS was today's best performer having the highest growth of 9.76% from YCP. DSEX reflected a mixed mode through the day resulting in 117 issues advancing out of 337 total issues traded.

DSE Sectoral Comparison today in turnover (In Mn BDT)



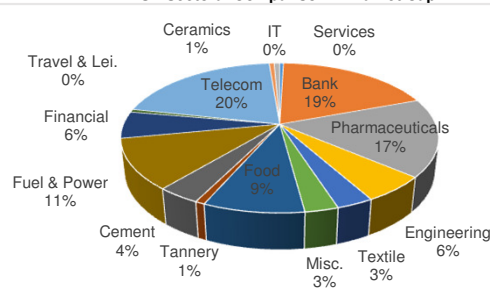
DSE Sectoral Comparison in P/E

Sector name	P/E Ratio
IT	20
Bank	10
Pharmaceuticals	19
Engineering	18
Textile	15
Misc.	25
Food	26
Tannery	17
Cement	46
Fuel & Power	11
Financial	14
Travel & Lei.	25
Telecom	23
Services	16
Ceramics	18

Average

16

DSE Sectoral Comparison in Market Cap



DSE's Important News Today

WMSHIPYARD

Sale declaration of a Sponsor Director

Mr. Md. Saeedul Islam, one of the Sponsors Directors of the Company, has expressed his intention to sell 3,07,436 shares out of his total holding of 44,87,514 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within April 30, 2018.

PRIMEFIN

Dividend Declaration

The Board of Directors has recommended No dividend for the year ended on December 31, 2017. Date of AGM: 28.06.2018, Time: 10:30 AM, Venue: PSC Convention Hall, Police Staff College, Bangladesh, Mirpur-14, Dhaka. Record Date: 25.04.2018. The Company has also reported Consolidated EPS of Tk. (1.68), Consolidated NAV per share of Tk. 8.52 and Consolidated NOCFPS of Tk. 3.27 for the year ended on December 31, 2017 as against Tk. (3.48), Tk. 10.21 and Tk. (3.31) respectively for the same period of the previous year.

FASFIN

Dividend Declaration

The Board of Directors has recommended 10% stock dividend for the year ended on December 31, 2017. Date of AGM: 20.06.2018, Time: 10:30 AM, Venue: RAOWA Convention Hall, Hall No. 3 (Eagle) VIP Road, Mohakhali, Dhaka-1206. Record Date: 19.04.2018. The Company has also reported Consolidated EPS of Tk. 1.10, Consolidated NAV per share of Tk. 14.67 and Consolidated NOCFPS of Tk. 8.01 for the year ended on December 31, 2017 as against Tk. 0.72 (restated), Tk. 14.12 (restated) and Tk. 9.10 (restated) respectively for the same period of the previous year.

Others News Today

Nine banks suffer Tk 194.67b capital shortfall in 2017 – Source: The Financial Express

Nine banks, six owned by government, suffered an aggregate capital shortfall worth over Tk 194.67 billion in the last calendar year mainly as their swelling classified loans took a toll. Sources in the banking circles indicated a worrying feature of the syndrome as two more banks hit the list of capital-deficient ones during the third quarter of 2017. The nine banks-four state-owned commercial banks (SoCBs) out of total six, three of 40 private commercial banks (PCBs) and two specialised banks (SBs)--were put on the list of capital-deficient ones, according to the central bank officials. Of the two latest entrants, one is a SoCB and another one fourth-generation PCB. In 2016, seven banks were suffering from capital shortfall worth Tk 153.04 billion. The overall capital shortfall of the four SoCBs rose to Tk 88.53 billion as on December 31 last year from Tk 76.26 billion three months before. However, the capital shortage of two specialised banks (SBs) stood at nearly Tk 85.90 billion in the fourth quarter (Q4) of 2017 in a rise from Tk 82.83 billion as on September 30, 2017. The capital shortfalls of three PCBs amounted to Tk 20.24 billion in the Q4 from Tk 17.91 billion in the Q3 of 2017. Nine banks out of 57 failed to keep requisite provisions against loans, particularly classified ones, in 2017 following higher classified loans along with conditional rescheduling of credits. Bangladesh started implementing the Basel-III standard for calculation of CRAR of all banks in Q1 of 2015 for consolidating stability in the banking sector. Under a roadmap to comply with the Basel-III, the banks will have to maintain 11.875 per cent of CRAR in 2018. Finally in 2019, it will hit the desired level of 12.50 per cent. Basel-III is a new global regulatory standard on banks' capital adequacy and liquidity as agreed by the members of the Basel Committee on Banking Supervision. The Basel-III is set to strengthen bank capital requirements and introduce new regulatory requirements on bank liquidity and bank leverage.

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Disclaimer: Estimates and projections are our own and are based on assumptions we believe to be reasonable.

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