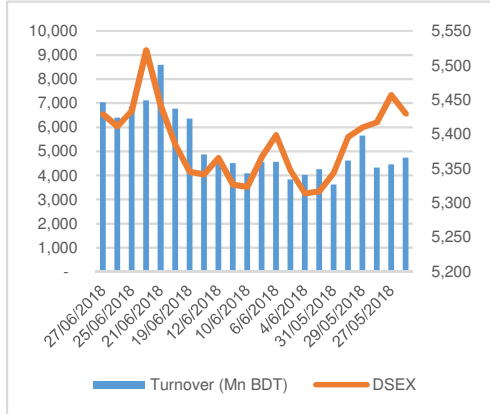


| INDEX MOVER     |       |       |         |           |
|-----------------|-------|-------|---------|-----------|
| Company         | LTP   | YCP   | IND.CHG | VOLUME    |
| Positive impact |       |       |         |           |
| ICB             | 147   | 137   | 11.06   | 405,113   |
| RENATA          | 1,277 | 1,254 | 2.63    | 12,714    |
| BATBC           | 3,440 | 3,420 | 2.05    | 374       |
| DUTCHBANGL      | 120   | 114   | 2.00    | 340,397   |
| KPCL            | 71    | 68    | 1.74    | 1,536,500 |
| Negative impact |       |       |         |           |
| GP              | 395   | 398   | (7.19)  | 342,968   |
| UPGDCL          | 261   | 264   | (1.53)  | 412,052   |
| MARICO          | 1,151 | 1,178 | (1.40)  | 619       |
| EBL             | 34    | 35    | (0.98)  | 118,257   |
| UNIQUEHRL       | 54    | 56    | (0.78)  | 1,554,760 |

YCP = Yesterday Closing Price LTP = Last Trade Price

## DSE in Last 1 Month



## Top Gainers (Turnover based)

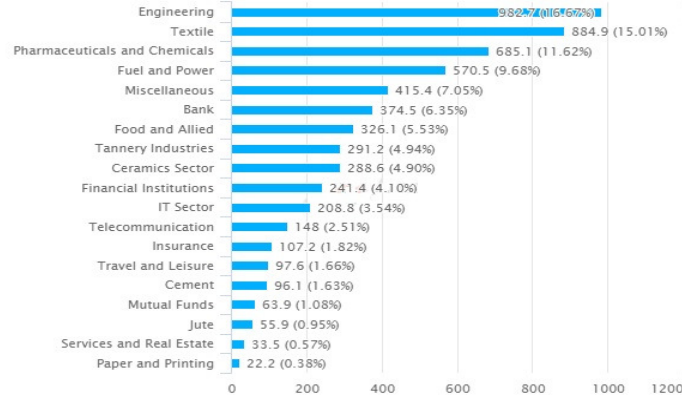
| INSTRUMENT | Price | Value (Mn BDT) | Volume    |
|------------|-------|----------------|-----------|
| MONNOCERA  | 298   | 253            | 878,441   |
| RSRMSTEEL  | 67    | 201            | 2,990,375 |
| AIL        | 104   | 177            | 1,686,014 |
| SQURPHARMA | 292   | 151            | 516,219   |
| QUEENSOUTH | 63    | 149            | 2,421,688 |
| GP         | 395   | 136            | 342,968   |
| FUWANGFOOD | 19    | 133            | 7,013,341 |
| PHARMAID   | 662   | 126            | 193,031   |
| PTL        | 51    | 116            | 2,215,291 |
| APEXFOOT   | 352   | 114            | 316,468   |

| Market Statistics        | Today     | % Change | World Markets | Exchange Rates |
|--------------------------|-----------|----------|---------------|----------------|
| Market Cap (In Mn BDT)   | 3,860,693 | 0.41%    | Indices       | Currency       |
| Total Volume (In Mn BDT) | 7,035     | 10.02%   | NASDAQ        | USD            |
| DSEX                     | 5,429     | 0.33%    | HANG SENG     | GBP            |
| DSES                     | 1,266     | 0.50%    | BSE-SENSEX    | EUR            |
| DS-30                    | 1,969     | 0.15%    |               |                |
| Market P/E               | 17        |          |               |                |

## Market Commentary

Today's Market / DSEX (Prime bourse : DSE / Dhaka Stock Exchange Ltd.) ended up 0.33% with 10.02% growth in total turnover. MONNOCERA, RSRMSTEEL, AIL, SQURPHARMA, QUEENSOUTH stocks dominated today's market turnover. However, ORIONINFU was today's best performer having the highest growth of 10% from YCP. DSEX reflected a bullish mode through the day resulting in 191 issues advancing out of 339 total issues traded.

## DSE Sectoral Comparison today in turnover (In Mn BDT)



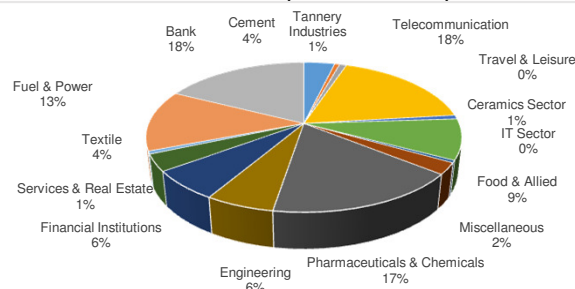
## DSE Sectoral Comparison in P/E

| Sector name           | P/E Ratio |
|-----------------------|-----------|
| Cement                | 37        |
| Travel & Leisure      | 25        |
| Tannery Industries    | 23        |
| Telecommunication     | 21        |
| Ceramics Sector       | 21        |
| Food & Allied         | 20        |
| IT Sector             | 19        |
| Miscellaneous         | 19        |
| Pharmaceuticals &     | 19        |
| Engineering           | 17        |
| Financial Institution | 17        |
| Textile               | 16        |
| Services & Real Es    | 15        |
| Fuel & Power          | 13        |
| Bank                  | 12        |

Average

17

## DSE Sectoral Comparison in Market Cap



## DSE's Important News Today

### BPML

Trading of New Security

Trading of the shares of Bashundhara Paper Mills Limited will commence at DSE from July 2, 2018 under 'N' category. DSE Trading Code for Bashundhara Paper Mills Limited is "BPML" and DSE Company Code is 19512.

### NBL

Buy & Sale Declarations of Sponsor Director

Mr. Moazzam Hossain, one of the Sponsors Directors of the Company has expressed his intention to sell 2,00,00,000 shares out of his total holding of 10,12,13,592 shares whereas Sikder Insurance Company Limited, a Corporate Director of the Company has expressed its intention to buy 2,00,00,000 shares of the Company at prevailing market price (In the Block Market) through Stock Exchange (DSE) within next 30 working days.

### UNIQUEHRL

LOI received from BPDB under the Consortium

The Company has informed that the Consortium of Unique Hotel & Resorts Limited, Guayama PR Holdings BV and Strategic Finance Limited received a letter of Intent (LOI) from Bangladesh Power Development Board (BPDB) on June 25, 2018 for the development of Gas/R-LNG based Combined Cycle Power Generation Facility of 584 MW (Net) capacity at Meghnaghat, Narayanganj on Build-Own-Operate (BOO) basis under the Power Purchase Agreement (PPA) following the Private Sector Power Generation Policy of Bangladesh for a period of 22 years from the date of commencement of commercial operation. The company has decided to give their consent to accept the same. The sponsor and initial shareholding position of the company is Unique Hotel & resorts Limited with 65.01%, Guayama PR Holdings BV with 30% and Strategic Finance Limited with 4.99% shareholding.

## Others News Today

### Warning against burdening banks - Source: The Financial Express

The financial sector of Bangladesh has developed a dangerous notion called 'mismatch of maturity', as short-term deposits are used for financing long-term investment here, eminent economist Dr. Rehman Sobhan opined. "The entire burden of investment for structural change in the economy as well as the private sector has fallen on the commercial banks, which is very unusual and very dangerous," he cautioned. "Historically, long-term investment finance is largely provided by the capital market and the specialized financial institutions dedicated to long-term investment," Mr. Sobhan said at a dialogue on the latest budget in the capital. "These are the institutions, specially designed for risk taking for undertaking long-term investment." "But with the stock market being non-functional as a source of long-term investment, the commercial banks, which depend on deposits of the short-term investors, are now bearing the full risk of undertaking financing long-term investment," he added. "Now we see a dangerous element in our financial system - the concept known as mismatch of maturity - where you are using short-term deposits for financing long-term investment." "This is the crisis which has been lingering for the last ten years, and which is likely to be carried over the next ten years, if it is not addressed properly," he cautioned. Mr. Sobhan's views were echoed by President of Metropolitan Chamber of Commerce and Industry, Dhaka (MCCI) Nihad Kabir. She observed that a dysfunctional capital market and uncertainty in the financial sector are hampering the private investment. "New good companies don't want to come to the capital market. We do not see anything there to make it an effective source of capital." "There is a significant regulatory failure there," she added. Focusing on the banking sector, Ms. Kabir said, "There has been a sharp decline in the growth rate of deposit in the banking sector from 19.4 per cent in the fiscal year (FY) 2012 to 9.5 per cent in September 2017, while it is currently around 10 per cent." Planning Minister A H M Mustafa Kamal, who attended the programme as the chief guest, opined that the banking sector and the National Board of Revenue (NBR) are in need of urgent reforms. State Minister for Finance and Planning M A Mannan also spoke on the occasion.

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