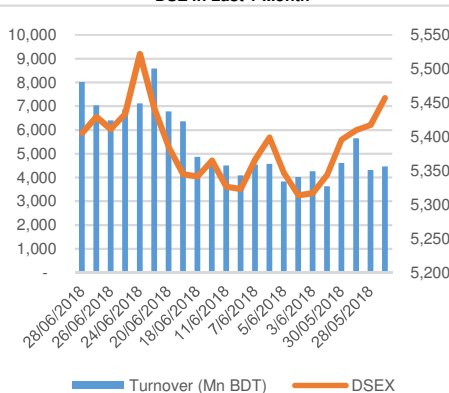


INDEX MOVER				
Company	LTP	YCP	IND.CHG	VOLUME
Positive impact				
ICB	152	147	5.41	626,827
RENATA	1,297	1,277	2.28	41,722
CITYBANK	34	32	1.99	2,184,690
SQURPHARMA	293	292	1.72	500,791
BATBC	3,457	3,440	1.62	356
Negative impact				
GP	389	395	(12.79)	398,540
UPGDCL	250	261	(7.76)	703,442
KPCL	68	71	(1.98)	1,124,650
BXPHERMA	94	96	(1.55)	247,292
TITASGAS	40	41	(1.48)	149,167

YCP = Yesterday Closing Price LTP = Last Trade Price

DSE in Last 1 Month

Top Gainers (Turnover based)

INSTRUMENT	Price	Value (Mn BDT)	Volume
RRSMSTEEL	70	371	5,396,307
MONNOCERA	302	243	799,765
PTL	53	205	3,893,929
UPGDCL	250	179	703,442
BRACBANK	72	157	2,209,939
GP	389	155	398,540
BEXIMCO	26	148	5,602,072
SQURPHARMA	294	146	500,791
QUEENSOUTH	62	140	2,232,648
ARAMIT	480	137	285,170

Market Statistics

Market Cap (In Mn BDT)
 Total Volume (In Mn BDT)
 DSEX
 DSES
 DS-30
 Market P/E

Today
 3,847,348
 8,014
 5,405
 1,264
 1,960
 17

% Change

-0.35%
 13.91%
 -0.43%
 -0.18%
 -0.44%

World Markets

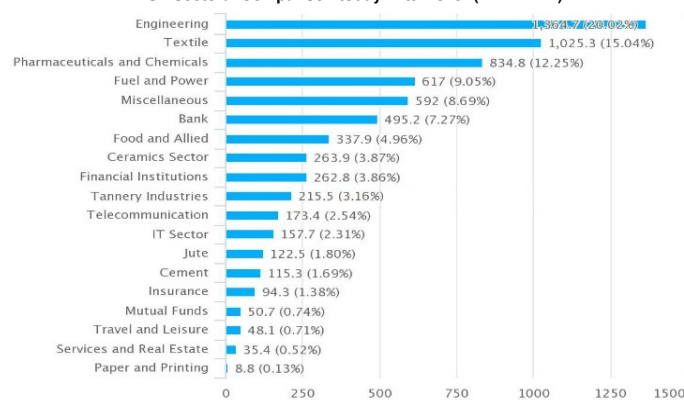
Indices % Change
 NASDAQ 7,445 -1.54%
 HANG SENG 28,497 0.50%
 BSE-SENSEX 35,038 -0.51%

Exchange Rates

Currency Rates
 USD 85.02
 GBP 111.34
 EUR 98.28

Market Commentary

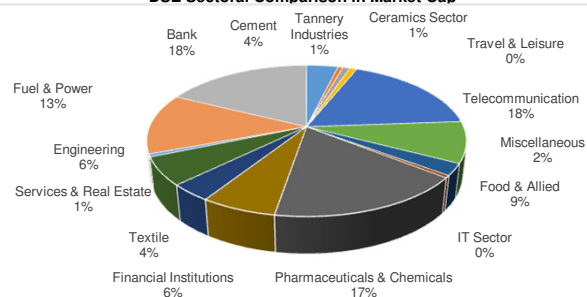
Today's Market / DSEX (Prime bourse : DSE / Dhaka Stock Exchange Ltd.) ended down 0.43% with 13.91% growth in total turnover. RSRMSTEEL, MONNOCERA, PTL, UPGDCL, BRACBANK stocks dominated today's market turnover. However, SAVAREFR was today's best performer having the highest growth of 10% from YCP. DSEX reflected a bearish mode through the day resulting in 211 issues declined out of 341 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	24
Tannery Industries	23
Ceramics Sector	22
Telecommunication	21
Food & Allied	20
Miscellaneous	19
IT Sector	19
Pharmaceuticals &	19
Financial Institution	17
Textile	17
Engineering	17
Services & Real Es	15
Fuel & Power	14
Bank	12

Average

17

DSE Sectoral Comparison in Market Cap

DSE's Important News Today
BBS

Receiving Notification of Award (NOA) of BBS Cables Limited from BREB

The Company has informed that BBS Cables Limited has received a "Notification of Award (NOA)" from BREB under "Distribution Network Expansion for 100% Rural Electrification (Dhaka, Mymensingh, Chittagong & Sylhet Divisions)" projects for the supply of Conductor, Insulated 600V (D-11 = 23000 Km, D-12 = 900 Km, D-14 = 342 Km i.e Total = 24,242 Km.) for the total amount of Tk. 93,60,69,180.00. The NOA will be effective upon signing the contract within 28 days. The letter of intimation will be submitted after signing the contract. The goods will have to be delivered within 4 months from the date of signing the contract. Bangladesh Building Systems Ltd. holds 16.67% stake of BBS Cables Ltd. which will eventually have a prospective impact on the profitability of the company after the completion of the jobs.

UPGDCL

Decision to acquire majority shares in the United Ashuganj Energy Ltd.

The Company has informed that the Board of Directors has decided to acquire majority shares (92.41%) at Face Value, in Principal, in the United Ashuganj Energy Ltd. (UAE), a company having generation capacity of 195 MW power (Gas Based) located at Ashuganj, Brahmanbaria-3402. UAE is a PPP (Public Private Partnership) Project with the Ashuganj Power Station Company Limited (APSC) and has a fixed term of 15 years from the date of Commercial Operations i.e May 08, 2015. The Board has also decided to acquire through outright purchase the 53 MW power generation plant (gas based) located at Char Chartola, Ashuganj, Brahmanbaria, belonging to the United Energy Ltd. (UEL), at the Net Asset Value of the plant. The above acquisitions are subject to the clearances from the Power Division, Ministry of Power Energy & Mineral Resources and Foreign/Local Lenders, as applicable, with retrospective effect from July 01, 2018. The company will hold an EGM in this respect to get approval from the shareholders of the Company. Details of the EGM, record date, time, venue etc. will be notified subsequently.

POPULARLIF

Dividend Declaration

The Board of Directors has recommended 40% cash dividend for the year ended on December 31, 2017. Date of AGM: 27.08.2018, Time: 12:00 noon, Venue: FARS Hotel & Resorts, 212, Shahid Syed Nazrul Islam Sharani, Purana Paltan, Dhaka-1000. Record Date: 24.07.2018. The Company has also reported EPS of Tk. 4.27, NAV per share of Tk. 80.52 and NOCFPS of Tk. (51.17) for the year ended on December 31, 2017 as against Tk. 4.02, Tk. 70.06 and Tk. (81.04) respectively for the same period of the previous year.

Others News Today
JS passes Tk 4.64 trillion budget for FY19 - Source: The Financial Express

The Jatiya Sangsad (JS) today passed a Tk 4.64 trillion national budget for fiscal year 2018-19 setting the GDP growth target at 7.8 per cent in a bid to further alleviate poverty, reduce inequalities and bring basic and qualitative changes in the living standards of the people. Finance Minister Abul Maal Abdul Muhith moved the Appropriations Bill, 2018 seeking a budgetary allocation of Tk 571833,82,92,000 which was passed by voice vote. Following the proposal mooted in the House by the Finance Ministry for parliamentary approval of appropriation of fund for meeting necessary development and non-development expenditures of the government, the ministers concerned placed justifications for the expenditures by their respective ministries, through 59 demands for grant. Earlier, parliament rejected by voice vote a total of only 448 cut-motions that were moved in the name of opposition and independent members on 59 demands for grants for different ministries. A total of nine MPs from Jatiya Party and independent submitted their cut-motions on the budget. The opposition and independent lawmakers proposed a total of 448 cut motions, but they only spoke on the motions for five demands for grants, which were rejected by voice votes. They were allowed to participate in the discussion on Higher Secondary and Higher Education Division, Health Ministry, Local Government Division, Disaster Management Ministry and Railways Ministry. Earlier on Wednesday, the Finance Bill 2018 was passed in Parliament with some changes in VAT and tariff rates, aiming to boost the ICT sector and promote local industries. The VAT on internet service lowered to 5.0 per cent from the proposed 15 per cent, while 5.0 per cent additional VAT from assembling mobile phone sets was exempted.

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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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