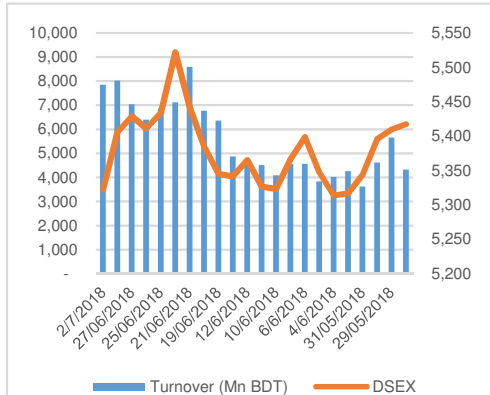


| INDEX MOVER | | | | |
|-----------------|-------|-------|---------|-----------|
| Company | LTP | YCP | IND.CHG | VOLUME |
| Positive impact | | | | |
| UPGDCL | 271 | 250 | 14.46 | 670,479 |
| RAKCEAMIC | 45 | 43 | 0.97 | 418,015 |
| MARICO | 1,177 | 1,160 | 0.91 | 210 |
| SHEPHERD | 29 | 27 | 0.59 | 2,372,450 |
| ARAMIT | 522 | 480 | 0.42 | 184,727 |
| Negative impact | | | | |
| GP | 381 | 389 | (17.72) | 202,220 |
| SQURPHARMA | 285 | 293 | (10.29) | 568,736 |
| ICB | 146 | 152 | (6.95) | 256,650 |
| BRACBANK | 68 | 71 | (6.23) | 979,242 |
| BATBC | 3,411 | 3,457 | (4.54) | 28 |

YCP = Yesterday Closing Price LTP = Last Trade Price

DSE in Last 1 Month

Top Gainers (Turnover based)

| INSTRUMENT | Price | Value (Mn BDT) | Volume |
|------------|-------|----------------|-----------|
| BPML | 131 | 887 | 6,308,834 |
| RSRMSTEEL | 67 | 334 | 4,742,850 |
| MONNOCERA | 302 | 279 | 880,566 |
| BEXIMCO | 26 | 196 | 7,555,291 |
| UPGDCL | 271 | 179 | 670,479 |
| PRIMETEX | 35 | 169 | 4,436,515 |
| SQURPHARMA | 285 | 163 | 568,736 |
| AIL | 98 | 146 | 1,459,802 |
| PTL | 53 | 139 | 2,614,792 |
| WATACHEM | 337 | 135 | 400,436 |

Market Statistics

| | | | |
|--------------------------|-----------|----------|--------|
| Market Cap (In Mn BDT) | 3,827,062 | % Change | -0.53% |
| Total Volume (In Mn BDT) | 7,848 | % Change | -2.08% |
| DSEX | 5,322 | % Change | -1.54% |
| DSES | 1,248 | % Change | -1.27% |
| DS-30 | 1,916 | % Change | -2.25% |
| Market P/E | 16 | | |

Today

| | |
|--------------------------|-----------|
| Market Cap (In Mn BDT) | 3,827,062 |
| Total Volume (In Mn BDT) | 7,848 |
| DSEX | 5,322 |
| DSES | 1,248 |
| DS-30 | 1,916 |
| Market P/E | 16 |

World Markets

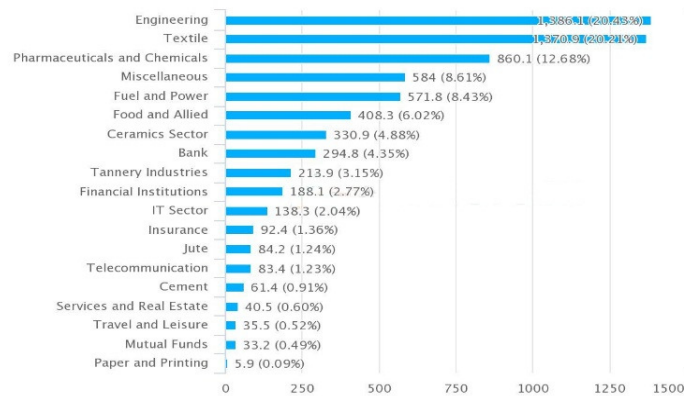
| Indices | % Change |
|------------|----------|
| NASDAQ | 0.39% |
| HANG SENG | 1.61% |
| BSE-SENSEX | -0.45% |

Exchange Rates

| Currency | Rates |
|----------|--------|
| USD | 83.48 |
| GBP | 109.86 |
| EUR | 97.18 |

Market Commentary

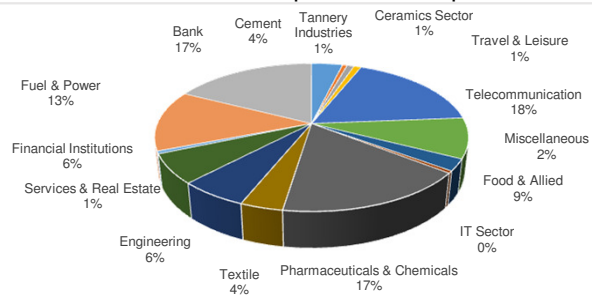
Today's Market / DSEX (Prime bourse : DSE / Dhaka Stock Exchange Ltd.) ended down 1.54% with 2.08% decline in total turnover. BPML, RSRMSTEEL, MONNOCERA, BEXIMCO, UPGDCL stocks dominated today's market turnover. However, BPML was today's best performer having the highest growth of 63.50% from YCP. DSEX reflected a bearish mode through the day resulting in 206 issues declined out of 342 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 & Chemicals | 18 |
| Textile | 17 |
| Engineering | 17 |
| Financial Institution | 16 |
| Services & Real Es | 15 |
| Fuel & Power | 13 |
| Bank | 12 |

Average

16

DSE Sectoral Comparison in Market Cap

DSE's Important News Today
ALARABANK

To Reduce share holding percentage of its subsidiary Company

The Company has informed that the Board of Directors of the Company, among others, has taken decision to reduce shareholding percentage of its subsidiary Company Millennium Information Solution Ltd. from 51% to 10% within next 2 years, subject to approval of Bangladesh Bank.

AFCAGRO

EGM to increase Authorized capital and to amend clause of the AOA

The Company has informed that the Board of Directors has decided to hold an EGM on August 12, 2018 at 10:00 AM to increase the Authorized share capital of the Company from Tk. 100.00 crore to Tk. 300.00 crore by amending Clause - V of the Memorandum of Association and Clause - 5 of the Articles of Association of the Company. Venue of the EGM: Institution of Diploma Engineers Bangladesh, 160/A, Kairail VIP Road, Dhaka-1000. Record date for EGM: 19.07.2018.

PLFSL

Dividend Declaration

The Board of Directors has recommended No dividend for the year ended on December 31, 2017. Date of AGM: 18.09.2018, Time: 9:30 AM, Venue: RAOWA Convention Center (Anchor Hall), 3rd Floor, Mohakhali, Dhaka. Record Date: 07.08.2018. The Company has also reported Consolidated EPS of Tk. 0.10, Consolidated NAV per share of Tk. 10.90 and Consolidated NOCFPS of Tk. 5.76 for the year ended on December 31, 2017 as against Tk. (1.73), Tk. 10.88 and Tk. (4.30) respectively for the same period of the previous year.

Others News Today
FBCCI seeks strong supervision for continuation of single digit lending rate - Source: The Financial Express

Hailing the reduced lending rate by the banks, the country's apex trade body on Monday called for strict supervision for continuation of the single digit lending rate for the sake of investment. The Federation of Bangladesh Chambers of Commerce and Industry (FBCCI), at the same time, demanded a high-powered taskforce to check the scope of NPL (non-performing loan) by properly addressing its reasons. In the post-lending rate reduction, they also suggested immediate measures to form an independent banking commission to ensure governance in the struggling banking system. FBCCI president Md. Shafiul Islam Mohiuddin thanked all the groups, including Prime Minister, Ministry of Finance, Bangladesh Bank and ABB (Bangladesh Association of Banks) for bringing down the lending rate to single digit. Other leaders of the FBCCI were also present at the press conference.

Bangladesh Bank eases rules on bank guarantee to foreign firms - Source: The Financial Express

The central bank has relaxed regulations, allowing commercial banks to issue guarantee on behalf of foreign-controlled firms favoring the local authorities against counter-guarantee from foreign banks. The banks are also allowed to issue such guarantee in both local and foreign currencies without prior approval from the Bangladesh Bank (BB), a senior central banker said. He also said the central bank has relaxed the guidelines for foreign exchange transactions to facilitate the foreign firms' business activities in Bangladesh. "It will also help the foreign firms involved in implementing the mega projects in Bangladesh," the BB official explained. The central bank of Bangladesh issued a circular in this regard on Thursday and asked all authorized dealer (AD) banks in foreign exchange to follow the instructions on issuance of guarantee on behalf of foreign-owned firms in favor of residents against foreign back to bank guarantee. Under the existing regulations, the ADs are permitted to issue guarantee, bid bond or performance bond in foreign currency or in local currency on behalf of non-resident company favoring residents in Bangladesh, provided they hold a back to back guarantee covering the guaranteed amount from an overseas correspondent or other overseas banks.

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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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