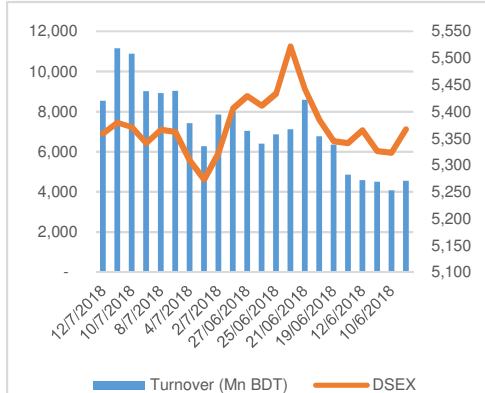


INDEX MOVER				
Company	LTP	YCP	IND.CHG	VOLUME
Positive impact				
GP	389	381	17.35	282,236
UPGDCL	327	302	16.71	1,234,030
SINGERBD	208	189	2.38	2,137,380
SPCL	101	93	2.02	1,062,360
BBSCABLES	90	85	1.20	2,752,070
Negative impact				
SOURPHARMA	282	284	(2.31)	251,336
CITYBANK	30	31	(1.91)	1,109,940
ICB	143	145	(1.64)	95,483
BXPHERMA	91	93	(1.20)	248,617
OLYMPIC	218	221	(1.02)	80,581

YCP = Yesterday Closing Price LTP = Last Trade Price

**DSE in Last 1 Month**

**Top Gainers (Turnover based)**

INSTRUMENT	Price	Value (Mn BDT)	Volume
SINGERBD	208	436	2,137,377
UPGDCL	325	391	1,234,026
KDSALTD	84	251	3,017,526
BBSCABLES	91	242	2,752,066
MONNOCERA	345	240	687,715
LEGACYFOOT	151	230	1,519,404
BPML	153	214	1,394,960
QUEENSOUTH	66	208	3,040,860
PTL	56	192	3,457,013
PENINSULA	33	184	5,560,986

**Market Statistics**

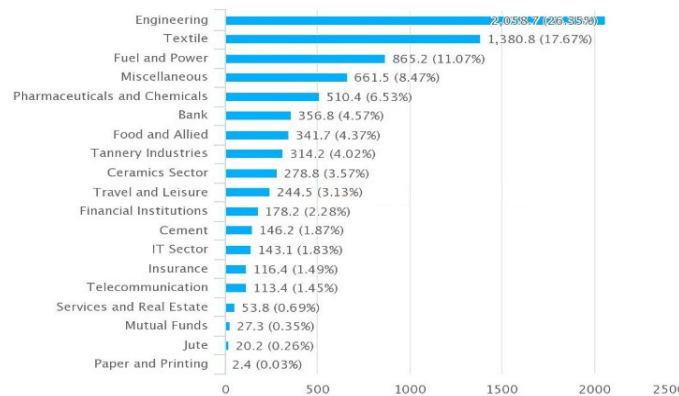
	Today	% Change
Market Cap (In Mn BDT)	3,868,774	0.28%
Total Volume (In Mn BDT)	8,530	-23.52%
DSEX	5,359	-0.38%
DSES	1,267	0.03%
DS-30	1,907	-0.45%
Market P/E	17	

**World Markets**

Indices	% Change	Currency	Rates
NASDAQ	7,717	USD	83.99
HANG SENG	28,481	GBP	111.00
BSE-SENSEX	36,548	EUR	98.08

**Exchange Rates**
**Market Commentary**

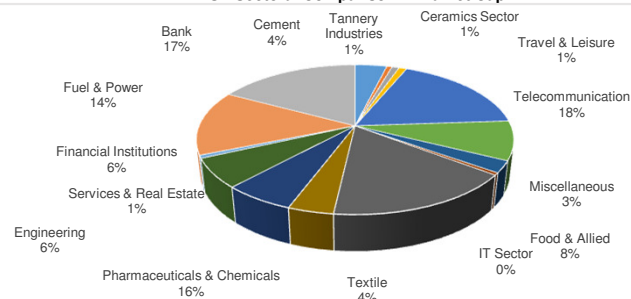
Today's Market / DSEX (Prime bourse : DSE / Dhaka Stock Exchange Ltd.) ended down 0.38% with 23.52% decline in total turnover. SINGERBD, UPGDCL, KDSALTD, BBSCABLES, MONNOCERA stocks dominated today's market turnover. However, KDSALTD was today's best performer having the highest growth of 9.97% from YCP. DSEX reflected a bearish mode through the day resulting in 222 issues declined out of 338 total issues traded.

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

**DSE Sectoral Comparison in P/E**

Sector name	P/E Ratio
Cement	38
Travel & Leisure	26
Tannery Industries	24
Ceramics Sector	24
Telecommunication	21
Food & Allied	20
Miscellaneous	19
IT Sector	19
Pharmaceuticals & Textile	18
Engineering	17
Financial Institution	16
Services & Real Es	16
Fuel & Power	14
Bank	11

Average

17

**DSE Sectoral Comparison in Market Cap**

**DSE's Important News Today**
**MONNOCERA**

Decision to import to modernize the factory

The Company has informed that they are importing 100% Brand New Biscuit Firing Roller Kiln from Modena Technology Limited & 100 Brand New Glost Firing Tunnel Kiln from Riedhammer GmbH Germany, through L/C for modernization of the factory which will arrive shortly. After installation of this new production line completely, production capacity of the Company will be doubled (i.e. 100% increase from existing capacity). This will allow the company to increase turnover significantly and meet huge demand for both exports and in domestic markets.

**AGRANINS**

Buy declaration of a Sponsor Director

Mr. Abdul Kader Khan, one of the Sponsors Directors of the Company, has expressed his intention to buy 75,000 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

**SHAHJABANK**

Buy Intimation

Artistic Design Ltd. (where Mr. A.K. Azad is the MD of Artistic Design Ltd. and also a Sponsor Director of Shahjalal Islami Bank Limited), has expressed its intention to buy 10,00,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchanges (DSE & CSE) within next 30 working days.

**Others News Today**
**BPC seeks govt. nod for oil sale at int'l rate - Source: The Financial Express**

State-run Bangladesh Petroleum Corporation (BPC) has sought government approval for selling imported oil for power plants at the international rate to slash losses. The soaring prices of petroleum products in the international market over the past several months have pushed the BPC back into the red zone. The corporation is currently incurring losses of around Tk 220 million a day, according to a senior official at the state-run oil trading agency. The loss stands at Tk 9.46 per litre against trading of diesel and Tk 16.88 per litre for furnace oil, considering July 2, 2018 oil price in the international market. Under the existing regulation, the BPC imports petroleum products at international market rate and sells at the government-fixed rate in the domestic market for all sorts of consumers including those of power plants. All government and some privately-owned power plants consume BPC's oil to generate electricity. In fiscal year (FY) 2017-18, the BPC imported around 5.80 million tonnes of diesel and furnace oil combined, of which around 2.0 million tonnes were consumed in power plants. The BPC, in a recent letter to the Energy and Mineral Resources Division (EMRD) under the Ministry of Power, Energy and Mineral Resources (MPEMR) wished to hike the domestic prices of the petroleum products to cut back on losses. The corporation sought government subsidies worth Tk 80 billion for FY 2018-19 unless the domestic oil prices are not raised, said the BPC official. The BPC sought hike, in part, to ensure funds available for executing some of its development projects to be implemented on its own costs. Officials said the BPC started incurring losses again in oil trading from November 2017, after making substantial profits for the last three consecutive years beginning from late 2014. The price of Brent crude, the benchmark in international oil price, climbed up to \$ 79 per barrel in July 2018 from \$ 47 in June, 2017 and below \$ 30 in early 2016. Apart from higher international oil price, BPC incurs heavy losses due to paying around 31 per cent import tax and freight charges along with margins for the state-run oil marketing companies and dealers. Taking the advantage of the slumping oil price in the international market and selling of oil at higher prices domestically, the BPC recorded a profit of Tk 42.12 billion during FY 2014-15, Tk 63.42 billion during FY 2015-16 and Tk 43.99 billion during FY 2016-17, according to BPC statistics. During FY 2017-18, the BPC reached a breakeven point, attaining profit in earlier months while incurring losses in later months, said the BPC official. It also provided Tk 22 billion to the government exchequer during FY 2016 and FY 2017 as dividend. The corporation also paid dues amounting to Tk 30.90 billion to state-owned Sonali Bank, Janata Bank, Agrani Bank and Rupali Bank, Tk 17.58 billion to Petrobangla, and Tk 6.03 billion as pending value added tax (VAT) to National Board of Revenue (NBR) over the past several years from its profit.

**MTB Securities Ltd.**

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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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