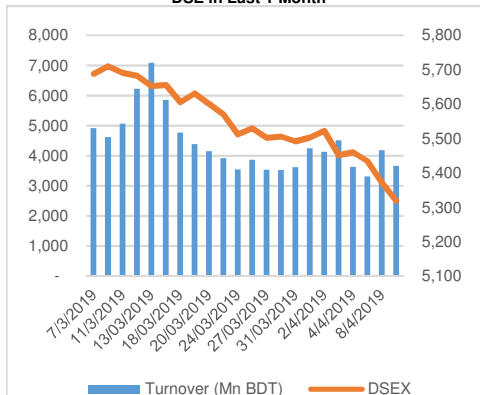


INDEX MOVER				
Company	LTP	YCP	IND.CHG	VOLUME
Positive impact				
SQRPHARM	263	261	2.46	194,257
RECKITTBN	3,579	3,484	0.70	17,930
TRUSTBANK	28	27	0.69	42,178
JAMUNABANK	18	17	0.47	724,140
NBL	9	9	0.41	1,626,550
Negative impact				
UPGDCL	340	373	(24.20)	659,889
GP	362	371	(18.74)	250,755
BATBC	1,570	1,673	(9.71)	129,194
MARICO	1,405	1,486	(3.95)	12,140
BRACBANK	75	76	(2.01)	579,586

YCP = Yesterday Closing Price LTP = Last Trade Price

DSE in Last 1 Month



Top Gainers (Turnover based)

INSTRUMENT	Price	Value (Mn BDT)	Volume
ESQUIRENIT	46	328	6,783,865
UPGDCL	340	233	659,889
BATBC	1,569	207	129,194
ECABLES	350	114	325,612
GP	361	91	250,755
BSCCL	157	85	537,835
FORTUNE	35	74	2,117,759
MONNOCERA	311	66	209,375
RECKITTBN	3,585	64	17,930
SQRPHARMA	263	51	194,257

Market Statistics

Market Cap (In Mn BDT)	3,973,293
Total Volume (In Mn BDT)	3,659
DSEX	5,319
DSES	1,233
DS-30	1,901
Market P/E	13.7

Today % Change

NASDAQ	-1.46%
HANG SENG	-12.46%
BSE-SENSEX	-1.00%
DS-30	-0.61%
DS-30	-1.25%

World Markets

Indices	% Change
7,954	0.19%
30,157	0.27%
38,939	0.62%

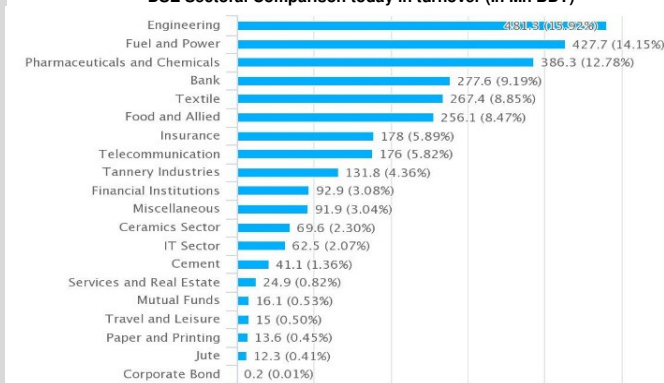
Exchange Rates

Currency	Rates
USD	84.20
GBP	110.14
EUR	94.93

Market Commentary

Today's Market / DSEX (Prime bourse : DSE / Dhaka Stock Exchange Ltd.) ended down 1.00% with 12.46% decline in total turnover. ESQUIRENIT, UPGDCL, BATBC, ECABLES, GP stocks dominated today's market turnover. However, MEGCONMILK was today's best performer having the highest growth of 8.44% from YCP. DSEX reflected a bearish mode through the day resulting in 231 issues declined out of 347 total issues traded.

DSE Sectoral Comparison today in turnover (In Mn BDT)

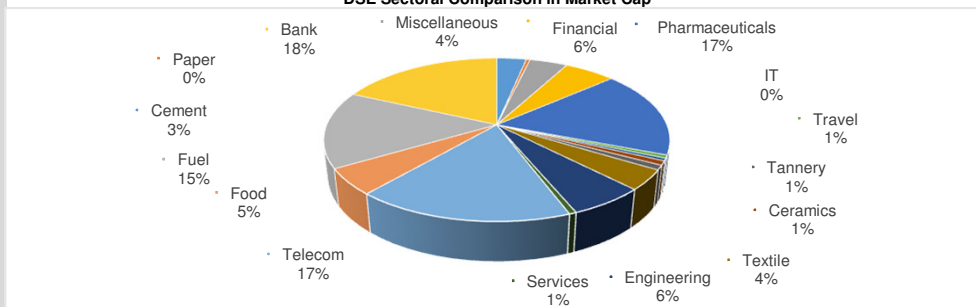


DSE Sectoral Comparison in P/E

Sector name	P/E Ratio
Cement	33
Paper	28
Miscellaneous	26
Financial	21
Pharmaceuticals	19
Travel	19
IT	17
Ceramics	17
Tannery	16
Textile	15
Engineering	15
Services	15
Telecom	14
Food	12
Fuel	12
Bank	9

Average 13.7

DSE Sectoral Comparison in Market Cap



DSE's Important News Today

RDFOOD

Sale & Buy Declarations of Sponsor Director

Mr. S.M. Fakhar-Uz-Zaman, one of the Sponsors of the Company, has expressed his intention to sell 9,25,000 shares out of his total holding of 28,10,406 shares whereas Concrete and Steel Technologies Limited, a Corporate Director of the Company, has expressed its intention to buy 9,25,000 shares of the Company, at prevailing market price (In the Block market) through Stock Exchange (DSE) within April 30, 2019.

DBH

Credit Rating Result

Emerging Credit Rating Limited (ECRL) has assigned the surveillance credit rating of the Company as "AAA" in the long term and "ST-1" in the short term along with a stable outlook based on audited financial statements of the Company up to December 31, 2018 and other relevant quantitative as well as qualitative information up to the date of rating.

QUASEMIND

Address Change of Share Office and Continuation of Production

With reference to their earlier news disseminated by DSE on 03.04.2019, the Company has further informed that Share Office of the Company has been shifted from FR Tower (21st Floor), Kemal Ataturk Avenue, Banani, Dhaka- 1213 to KHA 99/1/B, East Namapara, Khilkhet, Dhaka-1229. They also informed that normal production process and marketing activities of the Company has been continuing as usual.

Other News Today

Significant drop in pvt sector credit growth in Feb - Source: The Financial Express

The private-sector credit growth dropped significantly in February as some banks, particularly private ones, faced liquidity pressure due mainly to unavailability of deposits, bankers said. Credit growth fell to 12.54 per cent this February on a year-on-year basis from 13.20 per cent a month ago, showed the central bank's latest statistics released on Thursday. This growth was 3.96 percentage points lower than the Bangladesh Bank (BB)'s target of 16.50 per cent for second half (H2) of the current fiscal year. "Some banks are still facing liquidity pressure due to unavailability of funds, especially individual deposits," a senior executive of a leading private commercial bank told the FE. He said individual deposits are being diverted to government schemes due mainly to higher interest rates on public savings instruments than deposit rates offered by the banks. Currently, banks are offering interest rates on term deposits ranging between 6.00 per cent and 11 per cent. However, most of the offered rates were fixed at 9.50-10.50 per cent. On the other hand, yields on national savings certificates have been fixed between 11 per cent and 12 per cent. The current trend in the private-sector credit growth may continue in the coming months until liquidity situation improves, the private banker cited. Talking to the FE, Syed Mahbubur Rahman, chairman of the Association of Bankers, Bangladesh, said some banks have already squeezed loan disbursements due to liquidity pressure in the market. Meanwhile, the weighted average call money rate rose to 4.54 per cent on Monday from 4.53 per cent a week ago. The volume of overall transactions in the market came down to Tk 31.35 billion on the day from Tk 36.85 billion a week ago, the BB data showed. Some banks also maintained a 'go-slow' policy for loan disbursements as they were taking preparations to comply with the revised advance-deposit ratio (ADR) rules, Mr Rahman said. He said this while explaining the falling trend in private credit growth in February. Earlier on January 30, 2018, the BB slashed the ADR limit to help check any possible liquidity pressure on the market due to the banks' 'aggressive' lending. The ADR has been re-fixed at 83.50 per cent for all conventional banks and at 89 per cent for Shariah-based Islamic banks. The existing ratios are 85 per cent and 90 per cent respectively for them. The banks had to adjust it gradually by June 30, 2018. Later, the BB extended the deadline thrice for the implementation of the revised ADR by banks. Under the extended timeframe, the banks are allowed to implement the revised ADR limit by September 30 instead of March 31, 2019. However, the total outstanding loans with the private sector rose to Tk 9,703.49 billion in February 2019 from Tk 8,622.25 billion a year ago. It was Tk 9,638.08 billion in January 2019. "We're trying to keep the money market stable using different monetary instruments," a BB senior official told the FE in reply to a query on the latest market situation.

MTB Securities Ltd.

WW Tower (Level 4), 68 Motijheel C/A, Dhaka - 1000, Bangladesh
Telephone : +88 02 9347567 | Fax : +88 02 9348657
Email: info.query@mtbsecurities.com |
Website: www.mtbsecurities.com

Disclaimer: Estimates and projections are our own and are based on assumptions we believe to be reasonable. Information presented herein, while obtained from sources we believe to be reliable, is not guaranteed as to accuracy or completeness. Neither the information nor any opinion expressed herein constitutes a solicitation of the purchase or sale of any security. This report is intended for distribution to our valuable clients to present the daily Market Summary only.