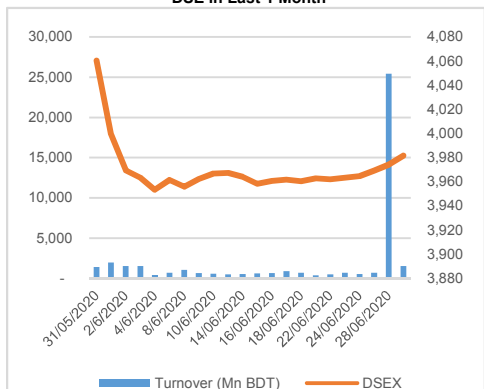


| INDEX MOVER | | | | |
|-----------------|-------|-------|---------|-----------|
| Company | LTP | YCP | IND.CHG | VOLUME |
| Positive impact | | | | |
| GLAXOSMITH | 2,170 | 2,084 | 1.48 | 24,494 |
| BXPHERMA | 68 | 66 | 1.10 | 2,433,869 |
| NBL | 7 | 6 | 0.83 | 1,707,530 |
| POWERGRID | 43 | 42 | 0.81 | 85,301 |
| NATLIFEINS | 228 | 223 | 0.79 | 5,278 |
| Negative impact | | | | |
| PUBALIBANK | 21 | 22 | (0.44) | 27,350 |
| MTB | 24 | 24 | (0.30) | 6,154 |
| FIRSTSBANK | 8 | 8 | (0.12) | 1,634,517 |
| JAMUNABANK | 16 | 16 | (0.11) | 1,267,220 |
| ACMELAB | 62 | 62 | (0.03) | 295,777 |

YCP = Yesterday Closing Price LTP = Last Trade Price

DSE in Last 1 Month



Top Gainers (Turnover based)

| INSTRUMENT | Price | Value (Mn BDT) | Volume |
|------------|-------|----------------|-----------|
| BXPHERMA | 68 | 163 | 2,433,869 |
| BSCCL | 84 | 70 | 839,596 |
| GLAXOSMITH | 2,170 | 53 | 24,494 |
| IBP | 20 | 49 | 2,396,614 |
| SQURPHARMA | 173 | 34 | 195,984 |
| LINDEBD | 1,287 | 29 | 22,468 |
| CENTRALPHL | 13 | 28 | 2,108,140 |
| CITYBANK | 17 | 25 | 1,542,623 |
| WATACHEM | 312 | 24 | 78,175 |
| PHARMAID | 403 | 20 | 50,929 |

| Market Statistics | |
|--------------------------|-----------|
| Market Cap (In Mn BDT) | 3,116,235 |
| Total Volume (In Mn BDT) | 1,547 |
| DSEX | 3,982 |
| DSES | 924 |
| DS-30 | 1,336 |
| Market P/E | 11.4 |

| Today | % Change |
|-------|----------|
| 1,547 | -93.92% |
| 3,982 | 0.19% |
| 924 | 0.20% |
| 1,336 | 0.28% |
| 11.4 | |

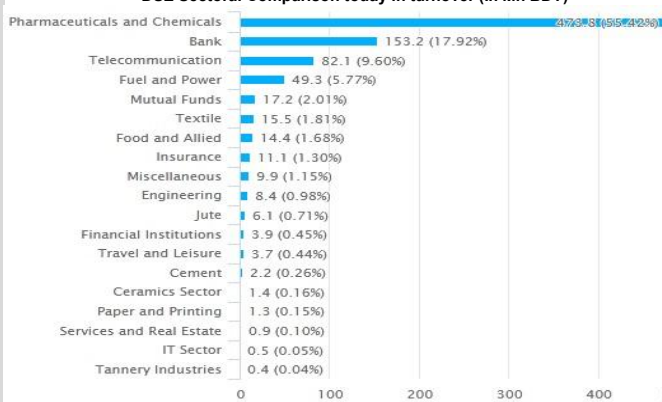
| World Markets | |
|---------------|---------------|
| Indices | % Change |
| NASDAQ | 9,757 -2.59% |
| HANG SENG | 24,301 -1.01% |
| BSE-SENSEX | 34,994 -0.48% |

| Exchange Rates | |
|----------------|--------|
| Currency | Rates |
| USD | 84.86 |
| GBP | 104.70 |
| EUR | 95.49 |

Market Commentary

Today's Market / DSEX (Prime bourse : DSE / Dhaka Stock Exchange Ltd.) ended up 0.19 % with 93.92 % decline in total turnover. BXPHERMA, BSCCL, GLAXOSMITH, IBP, SOURPHARMA stocks dominated today's market turnover. However, TALLUSPIN was today's best performer having the highest growth of 9.68 % from YCP. DSEX reflected a bullish mode through the day resulting in 42 issues advanced out of 304 total issues traded.

DSE Sectoral Comparison today in turnover (In Mn BDT)

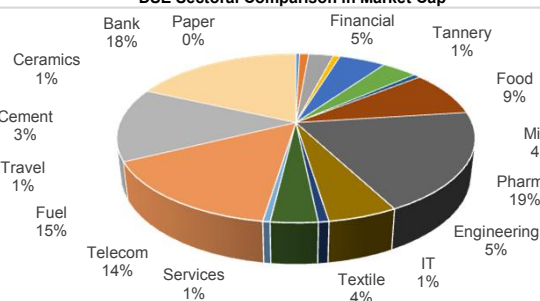


DSE Sectoral Comparison in P/E

| Sector name | P/E Ratio |
|-------------|-----------|
| Paper | 44 |
| Travel | 31 |
| Cement | 27 |
| Ceramics | 21 |
| Financial | 21 |
| Misc. | 20 |
| Tannery | 18 |
| Food | 17 |
| Pharma | 17 |
| Engineering | 15 |
| IT | 14 |
| Textile | 14 |
| Services | 11 |
| Fuel | 10 |
| Telecom | 9 |
| Bank | 6 |

Average 11.4

DSE Sectoral Comparison in Market Cap



DSE's Important News Today

UCB

Dividend Declaration

The Board of Directors has recommended 5% cash and 5% stock dividend for the year ended on December 31, 2019. Date of AGM: 03.09.2020, Time: 11:00 AM. Venue: Digital Platform. Record date: 19.07.2020.

TRUSTBANK

Dividend Declaration & issuance of Perpetual Bond

The Board of Directors has recommended 5% cash and 5% stock dividend for the year ended on December 31, 2019. The Board has also decided to issuance of Perpetual Bond worth Tk. 400.00 crore only to strengthen the capital base subject to the approval of Regulatory Authorities. Date of AGM: 23.08.2020, Time: 11:00 AM, Venue: Digital Platform as per BSEC order. Record Date: 20.07.2020.

PREMIERBAN

Dividend Declaration

The Board of Directors has recommended 5% cash and 5% stock dividend for the year ended on December 31, 2019. Date of AGM: 10.08.2020, Time: 3:00 PM, Venue: Digital Platform. Record Date: 21.07.2020.

Other News Today

EPB moots \$37 billion export target - Source: The Financial Express

The Export Promotion Bureau (EPB) has proposed setting a \$37.44-billion export target for fiscal year (FY) 2020-21, predicting 13-per cent growth, officials said. The EPB has also projected an additional \$7.6 billion in earnings from the export of services. More than 82 per cent of the proposed export earnings are expected to come from the ready-made garment (RMG) sector. The bureau expects the export receipts to reach \$33 billion by the end of the current fiscal year. The proposed export target is 13 per cent higher than the \$33 billion expected to be earned this fiscal. The initial target for the outgoing fiscal was \$45.50 billion. The EPB has prepared the proposal and sent it to the commerce ministry recently. It, however, did not consult the stakeholders concerned in this regard. Officials said global demand for products during virus pandemic have been taken into consideration. The projected \$33-billion earnings from FY '20 has also been the base of the new target. Merchandise export earnings in the outgoing fiscal witnessed negative growth except last July and December, exporters said, adding the situation is getting worst due to the coronavirus pandemic. The single-month merchandise shipments in April and May this year witnessed 82.85 per cent and 61.57 per cent negative growth compared to last year's April and May. In April and May, exports stood at only \$520.01 million and \$1.46 billion. The overall export earnings during the July-May period fell by 17.99 per cent to \$30.95 billion against \$37.75 billion in the corresponding period of last fiscal. The EPB, however, projected that export would reach \$33 billion at the end of June. When asked, Bangladesh Garment Manufacturers and Exporters Association president Dr Rubana Huq said export sectors have been witnessing an unprecedented time in history for the COVID-19 pandemic. The novel coronavirus has swept through the entire landscape of global economy, she added. Export has been a lifeline for local economy and indispensable to maintaining micro- and macro-economic stability. Hence such a devastating scenario is alarming, Ms Huq noted. Bangladesh fetched \$34.13 billion from RMG export in FY '19 marking 11.49-per cent growth over that in FY '18, she mentioned. The compound annual growth rate of apparel export in the past five years has been 6.86 per cent. "We're almost at the end of this fiscal. Until June 27, the total RMG export reached \$27.50 billion, which was \$34.13 billion during the same period last year." By the end of June, the year-end export figure might reach \$27.60 to \$27.65 billion, which would indicate more than 19-per cent fall in RMG export, she stated. According to the trade leader, such a downfall cannot be traced in the history of this industry so far. The decline in export this fiscal in actual amount is \$6.6 billion, which is around one fifth of last year's. Out of \$6.6-billion lost export, \$1.0-billion export was lost in the first half of 2019 and the remaining \$ 5.6 billion was lost in the last half. The RMG sector lost 4.8 billion worth of export just in three months from April to June 2020, showing the severity of COVID's impact on the industry. Ms Huq said the export sectors need government policy support to overcome the pandemic's impact and sustain.

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