

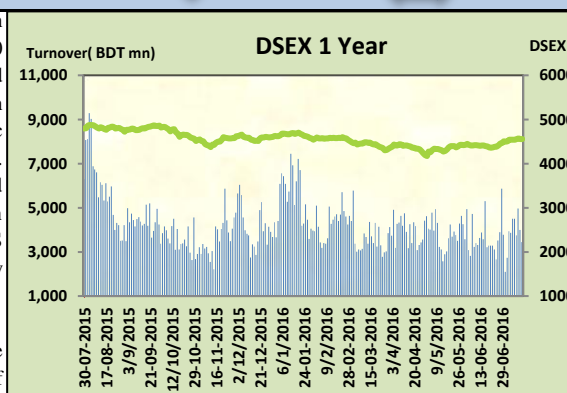
Today's Market Overview



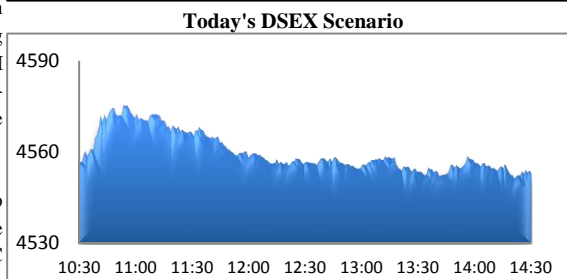
Thursday, July 21, 2016

| | | | | | | |
|--------------------------|----------|--------|----------------------|--------------------------|--------------------------|--------------------------|
| DSEX | 4,553.78 | -0.02% | Issues Traded | ↑ Advanced 119 | ↓ Declined 140 | ↔ Unchanged 65 |
| Turnover (BDT mn) | 4,077.70 | 18.18% | | | | |

Market extended the losing streak for another day though this time ended marginally flat with an improved turnover. The premier bourse of the nation opened a very positive mood and gained almost 20 points within the first session. Soon after the first hour sellers intensified their selling binge and continued to plunge the market till the end. Interestingly market found several see-saw movements in later part which apparently signified investors' commitment with market. Sellers were very enthusiastic while buyers also showed their buoyancy as a result most of the major sectors performed marginally. Small cap investors were busy in shifting towards major sectors as a result notable concentration occurred in some major sectors like Pharmaceuticals, Power, NBF, Bank & Engineering. Small cap stocks were in severity. Turnover hit the 4 billion mark after two days of mow down. Other two indices DS30 & DSES the shariah based index both performed marginally poor. Jute was the best gainer followed by Engineering & Power. Paper was the worst loser followed by IT & Food.



The general gauge DSEX ended at 4553.78 with a decline of -0.02% which cut only 0.77 points from the broad DSEX. The Turnover advanced by +18.18% which was 627 Million BDT healthier than that of previous day and finally finished the mark at 4077.70 million BDT. A total of 119 issues advanced with 140 declined & 65 remained unchanged. Sectors that improved were: Cement (+0.18%) Engineering (+1.30%) Insurance (+0.23%) Jute (+2.32%) Miscellaneous (+0.16%) Mutual Fund (+0.28%) NBF (+0.10%) Power (+0.58%) Tannery (+0.08%) Telecom (+0.01%) & Sectors that declined were: Bank (-0.23%) Ceramics (-0.26%) Food (-1.39%) IT (-1.60%) Paper (-2.32%) Pharmaceuticals (-0.21%) Service (-0.19%) Textiles (-0.23%) Travel (-0.76%).



BSRMLTD topped in the Volume chart with a turnover of 22.19 BDT crore. WATACHEM ranked top in gainer chart with a price hike of +10.00% and DULAMIACOT topped in the loser chart with a decline of -5.8% from its prevailing price. BSRMLTD led the way in the index mover chart while BATBC played the shatter part.

| Index Scenario | | | | Market Highlights | | | | |
|--------------------------|---------------------|----------|-----------|--------------------|---------------|------------------|-------------------|--------------|
| | INDEX | Change | % Changes | DSEX 52 week H/L | 4874/3960 | Market P/E (LTM) | 14.84 | |
| DSEX | 4553.78 | (0.77) | -0.02% | DSEX Week H/L | 4572/4537 | M.Cap | 3212093.5 | |
| DSES | 1114.25 | (1.56) | -0.14% | Group Performances | | | | |
| DS30 | 1779.29 | (0.46) | -0.03% | Category | Mkt Cap (mn.) | Δ % M.Cap | Turnover BDT (mn) | Δ % Turnover |
| Turnover Scenario | | | | Group A | 2,455,547.17 | 0.0% | 3,515.16 | 19.0% |
| Today's Turnover (mn.) | Change In BDT (mn.) | % Change | | Group B | 10,911.52 | 1.1% | 82.94 | 133.2% |
| 4077.70 | 627 | 18.18% | | Group N | 67,180.34 | -3.7% | 372.35 | -2.3% |
| | | | | Group Z | 36,873.98 | -0.5% | 51.10 | 26.6% |

| Top Ten Volume (in BDT. crore) | | | | | | | | | | |
|--------------------------------|-------|-------|-------|-----------------|--------|-------|-------|-------|------------------|----------------|
| Stock | TT | YT | AT | % Δ in Turnover | TT/AT | CP | YP | % Δ P | Number of shares | Public Holding |
| BSRMLTD | 22.19 | 20.58 | 9.25 | 7.8% | 140.1% | 163 | 157.1 | 3.8% | 274,244,180.0 | 9% |
| BXPHARMA | 18.60 | 11.07 | 6.03 | 68.1% | 208.4% | 86 | 84.6 | 1.7% | 362,944,698.6 | 5% |
| MJLBD | 17.12 | 12.48 | 6.41 | 37.2% | 167.0% | 105.4 | 103.2 | 2.1% | 15,218,280.0 | 19% |
| ACMELAB | 16.42 | 14.20 | 16.41 | 15.7% | 0.1% | 119.5 | 120.8 | -1.1% | 341,775,000.0 | 13% |
| SPCL | 15.66 | 7.75 | 8.98 | 101.9% | 74.4% | 155.4 | 151.9 | 2.3% | 190,686,141.8 | 9% |
| OLYMPIC | 10.59 | 6.77 | 4.99 | 56.5% | 112.2% | 344.7 | 350.5 | -1.7% | 276,739,950.1 | 61% |
| IPDC | 10.25 | 2.66 | 3.19 | 285.7% | 220.9% | 27.5 | 27 | 1.9% | 137,132,037.0 | 19% |
| SQURPHARMA | 9.84 | 8.93 | 10.39 | 10.2% | -5.3% | 264.3 | 265.3 | -0.4% | 190,417,988.2 | 27% |
| BRACBANK | 9.78 | 2.86 | 3.73 | 241.9% | 162.3% | 57.7 | 56.8 | 1.6% | 294,400,000.0 | 24% |
| DBH | 9.11 | 9.39 | 6.80 | -3.0% | 33.9% | 110.1 | 110.3 | -0.2% | 54,285,000.0 | 38% |

TT= Today's Turnover in crore, YT= Yesterday's Turnover in Crore, AT= Average of Last 20 day's Turnover, CP= Current Price, YP= Yesterday's Price, % Δ P= percentage change in price

**Top Ten Gainer****Top Ten Loser**

| Stock | CP | YP | AP | % Δ P | % Δ in P from AP | Stock | CP | YP | AP | % Δ P | % Δ in P from AP |
|------------|-------|-------|---------|--------|------------------|------------|----------|----------|----------|-------|------------------|
| WATACHEM | 146.3 | 133 | 131.59 | 10.0% | 11.2% | DULAMIACOT | 6.50 | 6.90 | 6.61 | -5.8% | -1.6% |
| ECABLES | 158.1 | 143.8 | 138.595 | 9.9% | 14.1% | GEMINISEA | 1,131.10 | 1,197.50 | 975.33 | -5.5% | 16.0% |
| NILTUBES | 89.7 | 81.6 | 80.795 | 9.9% | 11.0% | PRAGATIINS | 22.70 | 23.80 | 23.24 | -4.6% | -2.3% |
| ZEALBANGLA | 10.6 | 9.7 | 8.99 | 9.3% | 17.9% | 7THICB | 113.50 | 118.90 | 111.90 | -4.5% | 1.4% |
| RENWICKJA | 377.4 | 347.1 | 297.54 | 8.7% | 26.8% | FEDERALINS | 8.70 | 9.10 | 8.65 | -4.4% | 0.6% |
| FBFIF | 25.1 | 7.3 | 7.015 | 243.8% | 257.8% | SAMATALETE | 26.50 | 27.60 | 26.20 | -4.0% | 1.1% |
| AMBEEPHA | 318.2 | 301.9 | 292.05 | 5.4% | 9.0% | GLAXOSMITH | 1,654.50 | 1,721.10 | 1,711.65 | -3.9% | -3.3% |
| PHENIXINS | 20 | 19 | 19.465 | 5.3% | 2.7% | RELIANCINS | 41.00 | 42.40 | 40.81 | -3.3% | 0.5% |
| DSHGARME | 233.8 | 222.4 | 220.915 | 5.1% | 5.8% | KPPL | 9.50 | 9.80 | 9.23 | -3.1% | 3.0% |
| MIRACLEIND | 29.4 | 28 | 27.91 | 5.0% | 5.3% | MONNOSTAF | 417.70 | 430.20 | 416.31 | -2.9% | 0.3% |

AP= Average Price of last 20 day,% Δ in P from AP= percentage change in price from the 20-day average price

Industry /Sectors overview (Amounts in BDT. Crore)

| Sector | Trade Volume | | MKT Turnover % | | % Δ in Turnover | Market Capitalization | | % of Total MC | | % Δ in MC |
|-----------------------------|--------------|-----------|----------------|-----------|-----------------|-----------------------|-----------|---------------|-----------|-----------|
| | Today | Yesterday | Today | Yesterday | | Today | Yesterday | Today | Yesterday | |
| Bank | 44.80 | 40.75 | 0.11 | 0.12 | 9.96% | 41579.47 | 41675.92 | 16.20% | 16.23% | -0.23% |
| Cement | 11.37 | 16.89 | 0.03 | 0.05 | -2.72% | 14345.03 | 14319.29 | 5.59% | 5.58% | 0.18% |
| Ceramics | 2.95 | 2.31 | 0.01 | 0.01 | 7.50% | 2384.79 | 2390.91 | 0.93% | 0.93% | -0.26% |
| Engineering | 61.83 | 53.86 | 0.15 | 0.16 | 4.81% | 15163.15 | 14968.42 | 5.91% | 5.83% | 1.30% |
| Food & Allied Product | 19.31 | 16.73 | 0.05 | 0.05 | 5.43% | 24036.36 | 24374.60 | 9.37% | 9.49% | -1.39% |
| Insurance | 7.10 | 7.38 | 0.02 | 0.02 | 3.84% | 6661.91 | 6646.55 | 2.60% | 2.59% | 0.23% |
| IT | 5.80 | 7.36 | 0.01 | 0.02 | -1.24% | 922.08 | 937.10 | 0.36% | 0.37% | -1.60% |
| Jute | 1.68 | 2.73 | 0.00 | 0.01 | -8.37% | 89.77 | 87.74 | 0.03% | 0.03% | 2.32% |
| Miscellaneous | 21.30 | 17.01 | 0.05 | 0.05 | 5.22% | 8438.60 | 8424.76 | 3.29% | 3.28% | 0.16% |
| Mutual Fund | 3.11 | 3.37 | 0.01 | 0.01 | 7.61% | 3991.51 | 3980.30 | 1.56% | 1.55% | 0.28% |
| NBFI | 35.66 | 24.68 | 0.09 | 0.07 | 44.51% | 8002.02 | 7994.40 | 3.12% | 3.11% | 0.10% |
| Paper & Printing | 0.36 | 0.58 | 0.00 | 0.00 | -8.31% | 156.60 | 160.31 | 0.06% | 0.06% | -3.32% |
| Pharmaceuticals & Chemicals | 75.44 | 50.78 | 0.19 | 0.15 | 8.55% | 44388.51 | 44482.18 | 17.30% | 17.33% | -0.21% |
| Power & Energy | 71.38 | 49.21 | 0.18 | 0.15 | 5.04% | 35435.11 | 35229.63 | 13.81% | 13.72% | 0.58% |
| Service & Real Estate | 3.81 | 3.26 | 0.01 | 0.01 | 6.65% | 1544.56 | 1547.44 | 0.60% | 0.60% | -0.19% |
| Tannery | 4.96 | 4.57 | 0.01 | 0.01 | 8.65% | 2319.36 | 2317.54 | 0.90% | 0.90% | 0.08% |
| Telecommunication | 7.23 | 12.50 | 0.02 | 0.04 | -2.18% | 37937.38 | 37932.43 | 14.78% | 14.78% | 0.01% |
| Textile | 19.05 | 15.69 | 0.05 | 0.05 | 1.43% | 7311.87 | 7328.73 | 2.85% | 2.85% | -0.23% |
| Travel & Leisure | 1.85 | 4.50 | 0.00 | 0.01 | -8.79% | 1906.19 | 1920.70 | 0.74% | 0.75% | 0.76% |

MC= Market Capitalization, % Δ in Turnover= change in turnover from last day, % Δ in MC= change in Market cap from last day

| Index Movers | Index Shakers | Sector wise P/E (Fd.) | | | |
|--------------|---------------|-----------------------|--------|-----------------------------|--------|
| BSRMLTD | BATBC | Bank | 11.38 | NBFI | 18.88 |
| MJLBD | ISLAMIBANK | Cement | 31.71 | Paper & Printing | 111.43 |
| BRACBANK | OLYMPIC | Ceramics | 35.72 | Pharmaceuticals & Chemicals | 26.21 |
| BXPHERMA | GLAXOSMITH | Engineering | 32.96 | Power & Energy | 17.23 |
| SPCL | SQURPHARMA | Food & Allied Product | 27.37 | Service & Real Estate | 24.46 |
| JAMUNAOIL | TRUSTBANK | Insurance | 10.66 | Tannery | 41.42 |
| PUBALIBANK | PRIMEBANK | IT | 43.81 | Telecommunication | 23.89 |
| EBL | TITASGAS | Jute | 480.13 | Textile | 16.36 |
| ECABLES | NBL | Miscellaneous | 30.32 | Travel & Leisure | 21.17 |
| FBFIF | CITYBANK | | | | |

Important News

Company News:

FEDERALINS: Category Change: The Company will be placed in 'B' category from existing 'A' category with effect from July 24, 2016 as the Company has approved 5% stock dividend for general shareholders (excluding Sponsors/Directors) for the year ended on December 31, 2015.

IPDC: Q2 Financials:(Q2 Un-audited): EPS was Tk. 0.79 for April-June, 2016 as against Tk. 0.27 for April-June, 2015; EPS was Tk. 1.19 for January-June, 2016 as against Tk. 0.55 for January-June, 2015. NOCFPS was Tk. 0.63 for January-June, 2016 as against Tk. 2.25 for January-June, 2015. NAV per share was Tk. 17.52 as of June 30, 2016 and Tk. 16.33 as of December 31, 2015.

GLAXOSMITH: Q2 Financials: (Q2 Un-audited): EPS was Tk. 4.76 for April-June, 2016 as against Tk. 12.29 for April-June, 2015; EPS was Tk. 25.32 for January-June, 2016 as against Tk. 30.83 for January-June, 2015. NOCFPS was Tk. 3.95 for January-June, 2016 as against Tk. 35.28 for January-June, 2015. NAV per share was Tk. 186.47 as of June 30, 2016 and Tk. 174.21 as of June 30, 2015.

Recent Dividend Declaration

| Ticker | Dividend | Record Date |
|---|--------------------|-------------|
| Prime Islami Life Insurance Ltd | 20% C & 5% B | 8/8/2016 |
| Grameenphone Limited | 85% (interim cash) | 08.08.2016 |
| Sandhani Life Insurance Co. Limited | 25% B | 14.08.2016 |
| Fareast Islami Life Insurance Co. Limited | 39% C | 07.08.2016 |

Note: C= cash Dividend, B= Bonus Dividend, R=Right, N/A=NotApplicable

DSEX Technical Graph for last one year



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