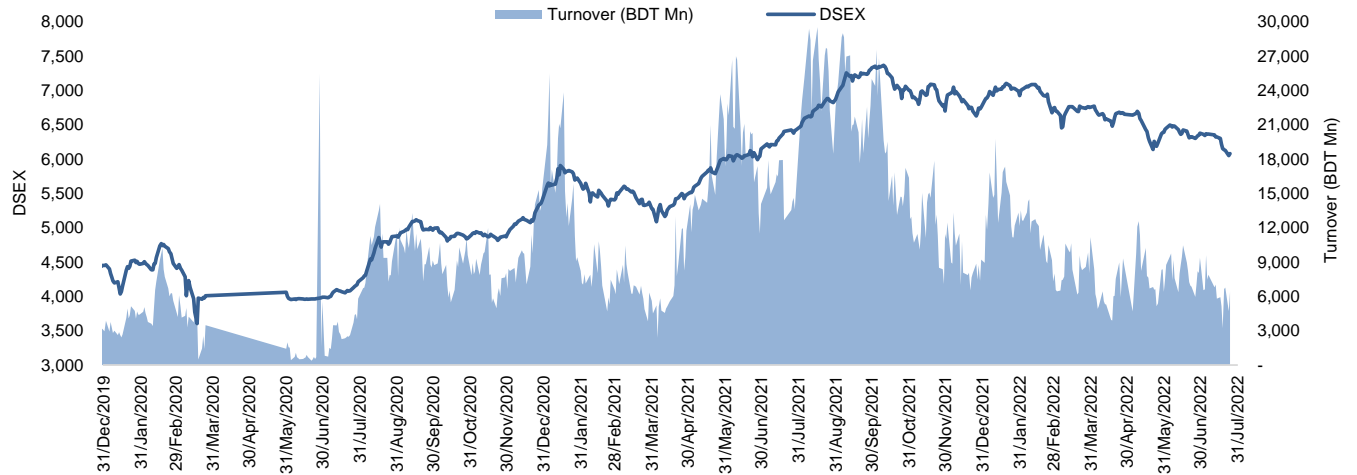


**Daily Market Update**

The market closed in green today. The benchmark index DSEX (+0.50%) gained 30.46 points and closed at 6,082.90. The blue-chip index DS30 (+0.42%), the Shariah-based index DSES (+0.30%), and the large-cap index CDSET (+0.50%) closed at 2,177.20, 1,332.32, and 1,207.28 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.57% followed by Engineering (+0.51%), Bank (+0.29%). Telecommunication experienced the highest loss of 0.66% followed by NBFI (-0.37%), Fuel & Power (-0.29%), Food & Allied (-0.01%). Block trades contributed 0.8% of the overall market turnover. Bangladesh Export Import Company Ltd. (+1.5%) was the most traded share with a turnover of BDT 453 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,082.90	6,052.44	+30.46	+0.50%	-10.0%
DS30	2,177.20	2,168.16	+9.04	+0.42%	-14.0%
DSES	1,332.32	1,328.36	+3.96	+0.30%	-6.9%
CDSET	1,207.28	1,201.32	+5.96	+0.50%	-11.2%

	Advanced	Declined	Unchanged	Total
All Category	196	131	53	380
A Category (Equity)	132	93	37	262
B Category (Equity)	56	26	8	90
N Category (Equity)	2	3	1	6
Z Category (Equity)	6	9	7	22
Mutual Funds	7	10	18	35
Corporate Bonds	1	3	0	4

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	4,993,465	4,984,392	
	Mn USD	52,869	52,773	+0.2%
Turnover	Mn BDT	6,400	4,710	+35.9%
	Mn USD	68	50	
Volume	Mn Shares	190	145	+31.6%
No. of Trade		141,938	106,854	+32.8%

\* Exchange Rate is BDT 94.45 as of Jul 25, 2022

Figure: Sectorial Turnover (BDT)

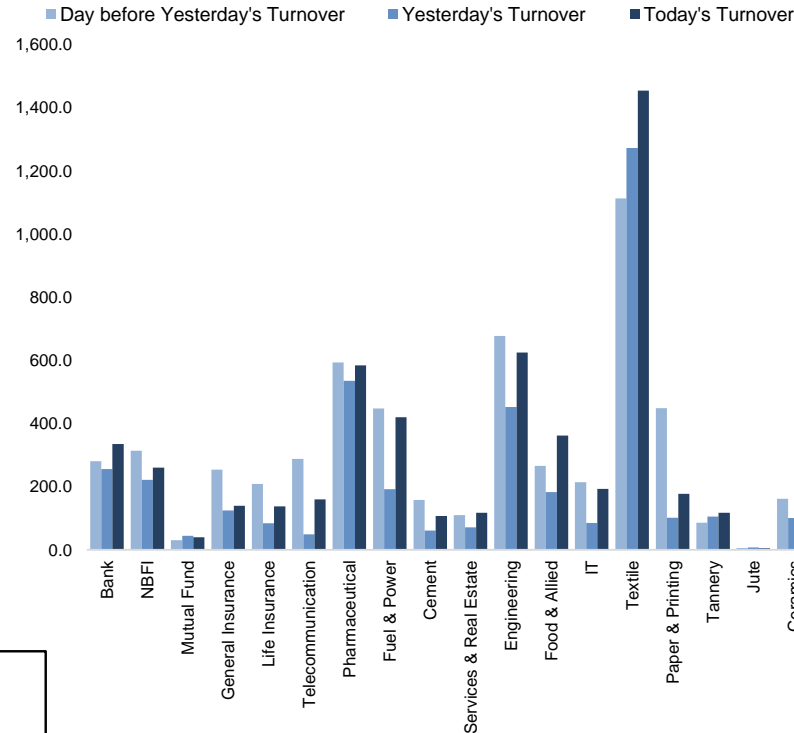
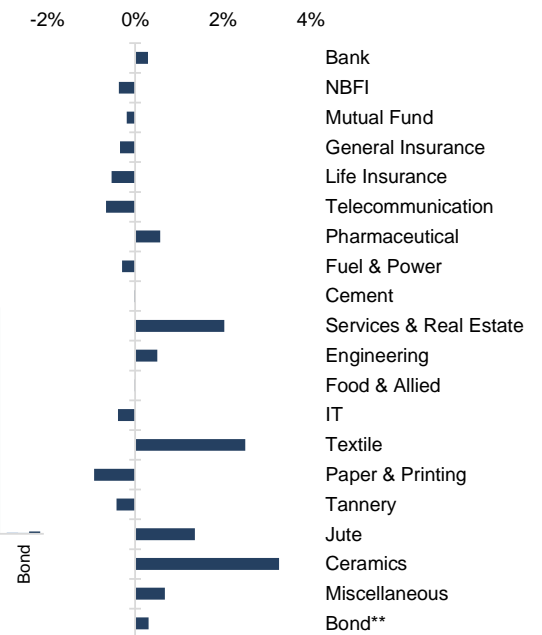


Figure: Sectorial Mcap Change



Market PE 15.2x  
Market PB 1.7x

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Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,413	1,409	+4.14	+0.29%	33	651,862	14.9%	335.4	5.5%	7.7x	0.7x	GP	387,671	8.9%	37.2	11.4x	7.7x
NBFI	1,900	1,907	-7.01	-0.37%	23	187,112	4.3%	260.2	4.2%	NM	3.4x	WALTONHIL	318,650	7.3%	1.5	22.3x	3.3x
Mutual Fund	853	854	-1.61	-0.19%	36	37,583	0.9%	39.9	0.6%	NM	0.8x	BATBC	280,638	6.4%	68.2	18.4x	8.5x
General Insurance	2,997	3,007	-10.34	-0.34%	41	88,586	2.0%	139.1	2.3%	14.1x	1.5x	SQURPHARMA	186,155	4.3%	79.3	10.1x	1.9x
Life Insurance	2,242	2,255	-12.11	-0.54%	13	64,624	1.5%	137.4	2.2%	NM	NM	ROBI	160,281	3.7%	99.7	87.4x	2.4x
Telecommunication	4,962	4,995	-32.93	-0.66%	3	584,198	13.3%	159.6	2.6%	15.3x	4.6x	RENATA	139,876	3.2%	11.5	25.3x	4.9x
Pharmaceutical	3,668	3,647	+20.76	+0.57%	32	688,763	15.7%	583.9	9.5%	17.0x	2.5x	UPGDCL	135,765	3.1%	7.6	11.0x	4.1x
Fuel & Power	1,718	1,723	-5.07	-0.29%	23	448,430	10.2%	420.3	6.8%	11.2x	1.1x	BEXIMCO	101,653	2.3%	453.2	7.1x	1.3x
Cement	2,333	2,334	-0.39	-0.02%	7	112,442	2.6%	107.5	1.8%	24.5x	2.4x	BERGERPBL	78,889	1.8%	2.8	27.1x	7.5x
Services & Real Estate	1,326	1,300	+26.41	+2.03%	8	50,153	1.1%	116.8	1.9%	69.8x	1.0x	MARICO	76,221	1.7%	4.6	21.4x	28.3x
Engineering	4,525	4,503	+22.76	+0.51%	42	529,875	12.1%	624.7	10.2%	18.5x	1.9x	LHBL	76,070	1.7%	80.3	19.5x	4.3x
Food & Allied	21,125	21,128	-3.14	-0.01%	21	375,135	8.6%	361.4	5.9%	22.8x	8.8x	ICB	74,377	1.7%	5.6	42.1x	1.7x
IT	2,468	2,478	-9.66	-0.39%	11	31,627	0.7%	193.1	3.1%	25.7x	2.2x	BXPBARMA	65,222	1.5%	57.1	11.4x	1.6x
Textile	1,600	1,561	+39.19	+2.51%	58	172,637	3.9%	1,453.6	23.7%	25.9x	1.1x	BRACBANK	58,217	1.3%	14.6	11.0x	1.1x
Paper & Printing	7,427	7,497	-69.91	-0.93%	6	27,187	0.6%	177.0	2.9%	NM	1.9x	BEACONPHAR	57,981	1.3%	18.4	62.0x	9.9x
Tannery	2,980	2,993	-12.73	-0.43%	6	31,824	0.7%	117.7	1.9%	44.9x	3.1x	ISLAMIBANK	52,647	1.2%	2.0	10.8x	0.8x
Jute	8,598	8,482	+115.57	+1.36%	3	1,981	0.0%	4.9	0.1%	NM	28.0x	DUTCHBANGL	43,693	1.0%	5.4	7.6x	1.1x
Ceramics	731	708	+23.21	+3.28%	5	32,574	0.7%	185.9	3.0%	30.5x	2.0x	TITASGAS	41,448	0.9%	140.4	12.4x	0.6x
Miscellaneous	4,096	4,068	+27.60	+0.68%	15	227,103	5.2%	715.8	11.7%	11.2x	1.9x	POWERGRID	38,060	0.9%	26.2	10.4x	0.4x
Bond**	88	88	+0.27	+0.30%	9	36,521	0.8%	7.8	0.1%	NM	NM	BSCCL	36,246	0.8%	22.7	15.7x	3.2x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MATINSPIINN	79.3	+9.7%	196.9	7.7x	1.4x	SQURPHARMA	121,801	7.4%	10.1x	1.9x	BEXIMCO	116.0	+1.5%	453.2	7.1x	1.3x
ZAHEENSPIN	13.3	+9.0%	60.9	NM	2.3x	BATBC	74,229	4.5%	18.4x	8.5x	KDSALTD	78.8	+6.8%	233.3	34.1x	3.1x
MONNOFABR	24.9	+6.9%	46.2	NM	1.0x	RENATA	68,162	4.2%	25.3x	4.9x	MATINSPIINN	79.3	+9.7%	196.9	7.7x	1.4x
KDSALTD	78.8	+6.8%	233.3	34.1x	3.1x	BEXIMCO	67,752	4.1%	7.1x	1.3x	TITASGAS	41.9	+0.5%	140.4	12.4x	0.6x
SAFKOSPIINN	29.2	+6.2%	69.3	6.2x	1.4x	BXPBARMA	45,538	2.8%	11.4x	1.6x	SONALIPAPR	615.9	-1.8%	111.0	43.5x	2.5x
GHCL	36.4	+5.5%	11.4	NM	0.7x	BEACONPHAR	40,587	2.5%	62.0x	9.9x	HRTEX	122.7	-1.2%	106.1	38.9x	2.9x
METROSPIN	26.2	+5.2%	38.9	18.5x	1x	GP	38,767	2.4%	11.4x	7.7x	PRIMETEX	42.5	+3.4%	103.3	13.2x	0.6x
ARGONDENIM	18.7	+5.1%	2.8	NM	0.8x	BRACBANK	31,298	1.9%	11.0x	1.1x	SPCERAMICS	44.3	+3.5%	102.4	99.4x	1.4x
APOLOISPAT	8.4	+5.0%	14.9	NM	0.4x	LHBL	26,868	1.6%	19.5x	4.3x	FORTUNE	77.0	-1.9%	100.3	24.8x	5.1x
ALLTEX	25.5	+4.9%	30.6	NM	4.3x	ISLAMIBANK	25,628	1.6%	10.8x	0.8x	ROBI	30.6	-1.9%	99.7	87.4x	2.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	19,343	1.2%	NM	0.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
STANDARINS	49.0	-2.0%	0.3	21.7x	2.4x	PUBALIBANK	18,243	1.1%	5.8x	0.6x	IPDC	59.0	58.0	3.0	1,009	58.53
PROGRESLIF	78.4	-2.0%	0.1	NM	NM	CITYBANK	17,615	1.1%	4.6x	0.7x	BEACONPHAR	240.1	240.0	2.0	139	33.25
CRYSTALINS	34.5	-2.0%	1.0	12.1x	1.5x	ROBI	16,028	1.0%	87.4x	2.4x	ORIONINFU	118.4	118.4	2.0	281	33.24
NEWLINE	44.4	-2.0%	0.4	23.5x	1.8x	ALARABANK	14,671	0.9%	10.8x	1.1x	PRIMEINSUR	84.4	84.4	2.0	250	21.10
MIRACLEIND	34.6	-2.0%	31.7	NM	1.1x	BSRMLTD	14,465	0.9%	5.0x	0.7x	GSPFINANCE	32.3	32.0	3.0	641	20.56
MEGHNAINS	44.5	-2.0%	0.5	61.5x	3.1x	OLYMPIC	14,282	0.9%	15.5x	2.5x	KDSALTD	76.0	73.2	7.0	235	17.59
PRIMEINSUR	84.4	-2.0%	0.8	38.5x	4.4x	UPGDCL	13,576	0.8%	11.0x	4.1x	DELTALIFE	152.5	136.0	3.0	116	15.82
IMAMBUTTON	129.1	-2.0%	0.2	NM	26.8x	SUMITPOWER	13,318	0.8%	8.6x	1.0x	FORTUNE	84.9	83.8	7.0	179	15.10
ECABLES	179.8	-2.0%	13.8	NM	21.7x						SUNLIFEINS	59.5	59.5	2.0	150	8.93
SHYAMPSUG	100.0	-2.0%	2.5	NM	NM						FUWANGFOOD	25.1	25.1	1.0	200	5.02

\*NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

\*\* The base of the Bond index starts at 100, starting from Jan 13, 2022

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
IPDC	59.0	58.0	58.5	1,009	3
BEACONPHAR	240.1	240.0	33.2	139	2
ORIONINFU	118.4	118.4	33.2	281	2
PRIMEINSUR	84.4	84.4	21.1	250	2
GSPFINANCE	32.3	32.0	20.6	641	3
KDSALTD	76.0	73.2	17.6	235	7
DELTALIFE	152.5	136.0	15.8	116	3
FORTUNE	84.9	83.8	15.1	179	7
SUNLIFEINS	59.5	59.5	8.9	150	2
FUWANGFOOD	25.1	25.1	5.0	200	1
MLDYEING	26.7	25.4	3.8	147	3
MATINSPINN	74.5	73.2	3.0	40	2
YPL	21.2	21.2	2.8	130	1
BSC	107.7	107.7	2.7	25	1
PRIMETEX	42.5	42.5	2.6	60	1
SONALIPAPR	614.5	614.5	1.9	3	1
GPHISPAT	52.3	52.3	1.7	33	1
GENEXIL	71.7	71.7	1.4	20	1
ZAHEENSPIN	12.5	12.5	1.3	100	1
FAREASTLIF	75.0	75.0	1.1	15	1
ECABLES	182.7	182.7	1.0	6	1
SKICL	48.9	48.9	0.9	18	1
<b>Total</b>			<b>257.6</b>		<b>54</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
National Life Insurance Company Ltd.	-	0.0%	35.0%	Record Date	28-Jul-22
Grameenphone Ltd.	-	0.0%	125.0%	Record Date	10-Aug-22
LafargeHolcim Bangladesh Limited	-	0.0%	15.0%	Record Date	11-Aug-22
Libra Infusions Limited	-	0.0%	5.0%	Record Date	11-Aug-22
Rupali Life Insurance Company Limited	-	0.0%	18.0%	Record Date	17-Aug-22

**Important DSE News**
**EASTLAND**

**(Q2 Un-audited):** EPS was Tk. 0.45 for April-June 2022 as against Tk. 0.42 for April-June 2021; EPS was Tk. 0.80 for January-June 2022 as against Tk. 0.75 for January-June 2021. NOCFPS was Tk. 0.60 for January-June 2022 as against Tk. 0.57 for January-June 2021. NAV per share was Tk. 21.46 as on June 30, 2022 and Tk. 21.22 as on June 30, 2021.

**UNILEVERCL**

**(Q2 Un-audited):** EPS was Tk. 14.99 for April-June 2022 as against Tk. 8.39 for April-June 2021; EPS was Tk. 29.32 for January-June 2022 as against Tk. 18.59 for January-June 2021. NOCFPS was Tk. 13.22 for January-June 2022 as against Tk. 13.68 for January-June 2021. NAV per share was Tk. 108.20 as on June 30, 2022 and Tk. 122.88 as on December 31, 2021. EPS increased due to efficiency in operating expenses, reduction of corporate income tax rate as well as large one-off benefit coming out of reassessment of past liabilities and obligations in light of recent business development. NAV per share decreased due to decrease in cash balance resulting from dividend payout. NOCFPS decreased due to lower advance received from customers compared to last year.

**ABBANK**

**(Q2 Un-audited):** Consolidated EPS was Tk. 0.24 for April-June 2022 as against Tk. 0.16 for April-June 2021; Consolidated EPS was Tk. 0.42 for January-June 2022 as against Tk. 0.31 for January-June 2021. Consolidated NOCFPS was Tk. 0.42 for January-June 2022 as against Tk. (8.73) for January-June 2021. Consolidated NAV per share was Tk. 30.55 as on June 30, 2022 and Tk. 31.07 as on June 30, 2021. The Company also informed that EPS has increased mainly increase of interest income and commission, exchange & brokerage income. NOCFPS has increased compared to the same period of last year mainly for increase of deposit and disbursement of new loan.

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