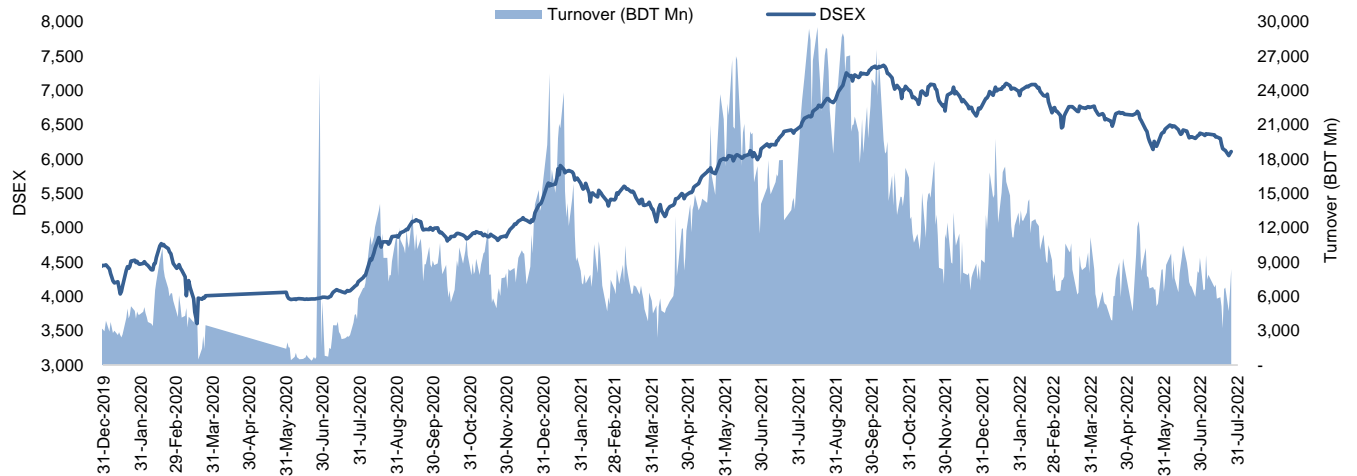


**Daily Market Update**

The market closed in green today. The benchmark index DSEX (+0.48%) gained 29.35 points and closed at 6,112.25. The blue-chip index DS30 (+0.59%), the Shariah-based index DSES (+0.12%), and the large-cap index CDSET (+0.49%) closed at 2,190.02, 1,333.98, and 1,213.25 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 1.50% followed by Food & Allied (+0.48%), Bank (+0.47%), Pharmaceutical (+0.29%), and Engineering (+0.19%), respectively. Fuel & Power closed flat, while Telecommunication lost 0.66%. Block trades contributed 1.4% of the overall market turnover. Bangladesh Export Import Company Ltd. (+1.7%) was the most traded share with a turnover of BDT 803 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,112.25	6,082.90	+29.35	+0.48%	-9.5%
DS30	2,190.02	2,177.20	+12.83	+0.59%	-13.5%
DSES	1,333.98	1,332.32	+1.66	+0.12%	-6.8%
CDSET	1,213.25	1,207.28	+5.97	+0.49%	-10.7%

	Advanced	Declined	Unchanged	Total
All Category	177	172	33	382
A Category (Equity)	154	90	19	263
B Category (Equity)	17	63	10	90
N Category (Equity)	3	2	1	6
Z Category (Equity)	3	17	3	23
Mutual Funds	25	5	5	35
Corporate Bonds	1	2	3	6

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,007,341	4,993,465	
	Mn USD	52,888	52,741	+0.3%
Turnover	Mn BDT	8,381	6,400	+31.0%
	Mn USD	89	68	
Volume	Mn Shares	224	190	+17.6%
No. of Trade		191,090	141,938	+34.6%

\* Exchange Rate is BDT 94.68 as of Jul 26, 2022

Figure: Sectorial Turnover (BDT)

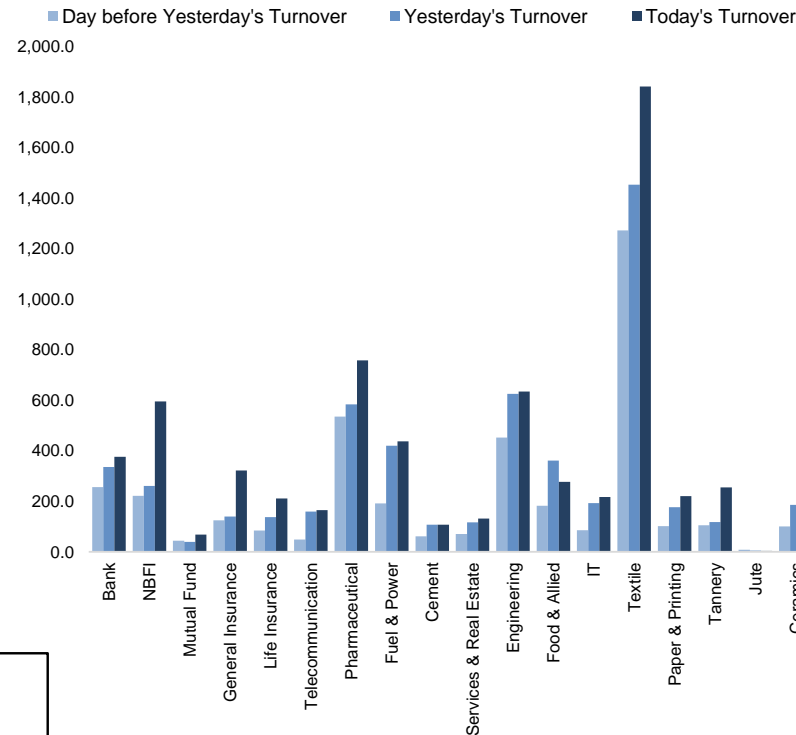
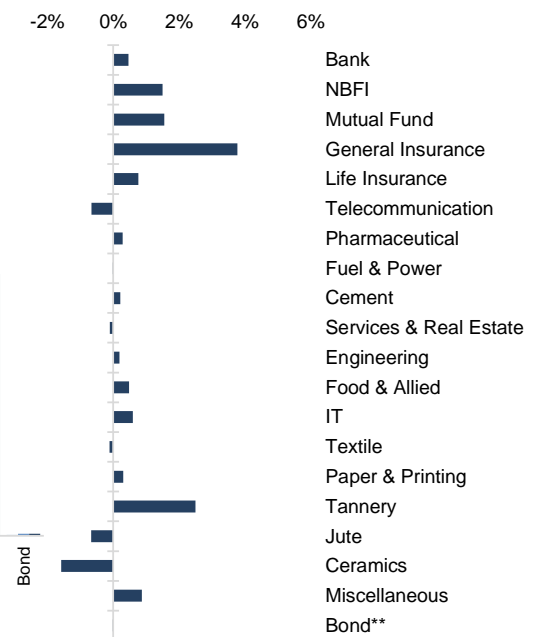


Figure: Sectorial Mcap Change



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	1,420	1,413	+6.63	+0.47%	33	654,920	14.9%	375.8	4.8%	7.7x	0.7x	GP	386,591	8.8%	64.9	11.4x	7.7x
NBFI	1,928	1,900	+28.51	+1.50%	23	189,920	4.3%	595.3	7.6%	NM	3.5x	WALTONHIL	320,104	7.3%	0.7	22.4x	3.3x
Mutual Fund	866	853	+13.25	+1.55%	36	38,167	0.9%	68.7	0.9%	NM	0.8x	BATBC	282,042	6.4%	65.4	18.5x	8.6x
General Insurance	3,110	2,997	+113.00	+3.77%	41	91,926	2.1%	322.1	4.1%	14.8x	1.5x	SQURPHARMA	186,598	4.3%	84.1	10.1x	1.9x
Life Insurance	2,260	2,242	+17.14	+0.76%	13	65,118	1.5%	210.6	2.7%	NM	NM	ROBI	157,662	3.6%	91.0	86.0x	2.4x
Telecommunication	4,929	4,962	-32.68	-0.66%	3	580,350	13.2%	164.6	2.1%	15.2x	4.5x	RENATA	140,112	3.2%	5.2	25.3x	4.9x
Pharmaceutical	3,678	3,668	+10.61	+0.29%	32	690,755	15.7%	757.8	9.7%	17.0x	2.5x	UPGDCL	135,939	3.1%	6.1	11.0x	4.1x
Fuel & Power	1,718	1,718	-0.02	-0.00%	23	448,424	10.2%	437.4	5.6%	11.2x	1.1x	BEXIMCO	103,406	2.4%	803.0	7.2x	1.3x
Cement	2,338	2,333	+5.09	+0.22%	7	112,687	2.6%	107.2	1.4%	24.5x	2.4x	BERGERPBL	79,158	1.8%	1.2	27.2x	7.5x
Services & Real Estate	1,325	1,326	-1.37	-0.10%	8	50,101	1.1%	131.3	1.7%	69.7x	1.0x	MARICO	76,611	1.7%	11.3	21.6x	28.5x
Engineering	4,534	4,525	+8.52	+0.19%	42	530,874	12.1%	634.3	8.1%	18.5x	1.9x	LHBL	75,954	1.7%	86.9	19.5x	4.3x
Food & Allied	21,227	21,125	+101.60	+0.48%	21	376,939	8.6%	277.4	3.5%	22.9x	8.9x	ICB	75,021	1.7%	2.9	42.5x	1.7x
IT	2,483	2,468	+14.76	+0.60%	11	31,816	0.7%	216.5	2.8%	25.9x	2.2x	BXPBARMA	66,560	1.5%	195.9	11.6x	1.7x
Textile	1,599	1,600	-1.80	-0.11%	58	172,443	3.9%	1,842.2	23.6%	25.9x	1.1x	BRACBANK	58,666	1.3%	32.3	11.0x	1.1x
Paper & Printing	7,450	7,427	+22.72	+0.31%	6	27,270	0.6%	220.7	2.8%	NM	1.9x	BEACONPHAR	57,011	1.3%	5.9	60.9x	9.8x
Tannery	3,055	2,980	+74.60	+2.50%	6	32,621	0.7%	255.3	3.3%	46.1x	3.2x	ISLAMIBANK	52,647	1.2%	5.9	10.8x	0.8x
Jute	8,540	8,598	-57.60	-0.67%	3	1,968	0.0%	4.0	0.1%	NM	27.8x	DUTCHBANGL	43,902	1.0%	5.3	7.6x	1.2x
Ceramics	719	731	-11.56	-1.58%	5	32,059	0.7%	156.0	2.0%	30.1x	1.9x	TITASGAS	40,756	0.9%	95.5	12.2x	0.6x
Miscellaneous	4,131	4,096	+35.70	+0.87%	15	229,082	5.2%	1,035.2	13.2%	11.3x	1.9x	POWERGRID	37,846	0.9%	17.0	10.3x	0.4x
Bond**	88	88	-0.01	-0.01%	9	36,519	0.8%	8.2	0.1%	NM	NM	SUMITPOWER	36,628	0.8%	17.5	8.7x	1.0x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SONARBAINS	51.7	+10.0%	8.9	25.5x	2.5x
KTL	24.5	+9.9%	207.4	49.9x	1.4x
PF1STMF	10.8	+9.1%	14.3	NM	1.8x
PRAGATILIF	72.9	+8.5%	1.7	NM	NM
SEMLLECMF	9.5	+8.0%	7.9	NM	1.1x
GLOBALINS	33.9	+7.3%	8.2	34.2x	2.5x
BGIC	40.0	+7.2%	3.6	20.6x	2x
DHAKAINS	51.9	+7.0%	2.3	14.1x	1.5x
VAMLRBBF	7.7	+6.9%	0.0	NM	0.8x
UNITEDINS	46.1	+6.5%	0.1	27.4x	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LEGACYFOOT	58.9	-2.0%	2.6	NM	5.4x
SAVAREFR	261.5	-2.0%	2.8	NM	3736x
NORTHERN	228.0	-2.0%	1.4	NM	2.8x
MLDYEING	24.8	-2.0%	53.6	84.0x	1.6x
ALLTEX	25.0	-2.0%	31.8	NM	4.2x
NLTUBES	80.1	-2.0%	14.2	NM	0.5x
IMAMBUTTON	126.6	-1.9%	0.0	NM	26.3x
INTECH	30.5	-1.9%	7.4	NM	2.8x
MEGHNA PET	40.7	-1.9%	0.4	NM	NM
LIBRAINFU	887.3	-1.9%	8.7	NM	0.7x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	122,091	7.4%	10.1x	1.9x
BATBC	74,600	4.5%	18.5x	8.6x
BEXIMCO	68,920	4.2%	7.2x	1.3x
RENATA	68,277	4.1%	25.3x	4.9x
BXPBARMA	46,472	2.8%	11.6x	1.7x
BEACONPHAR	39,908	2.4%	60.9x	9.8x
GP	38,659	2.3%	11.4x	7.7x
BRACBANK	31,539	1.9%	11.0x	1.1x
LHBL	26,827	1.6%	19.5x	4.3x
ISLAMIBANK	25,628	1.6%	10.8x	0.8x
EBL	23,976	1.5%	7.2x	1.0x
NBL	19,573	1.2%	NM	0.5x
PUBALIBANK	18,384	1.1%	5.9x	0.7x
CITYBANK	17,857	1.1%	4.7x	0.7x
ROBI	15,766	1.0%	86.0x	2.4x
ALARABANK	14,671	0.9%	10.8x	1.1x
BSRMLTD	14,641	0.9%	5.0x	0.7x
OLYMPIC	14,370	0.9%	15.6x	2.5x
UPGDCL	13,594	0.8%	11.0x	4.1x
SUMITPOWER	13,476	0.8%	8.7x	1.0x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	118.0	+1.7%	803.0	7.2x	1.3x
IPDC	58.5	+1.7%	288.8	24.2x	3.3x
FORTUNE	81.9	+6.4%	239.7	26.4x	5.4x
KTL	24.5	+9.9%	207.4	49.9x	1.4x
BXPBARMA	149.2	+2.1%	195.9	11.6x	1.7x
SONALIPAPR	623.3	+1.2%	171.3	44.0x	2.5x
MATINSPIINN	77.9	-1.8%	162.1	7.6x	1.3x
SQUARETEXT	68.7	+3.9%	160.3	7.9x	1.6x
KDSALTD	78.0	-1.0%	143.0	33.8x	3.1x
DELTALIFE	137.4	+1.0%	135.3	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BSC	110.0	110.0	2.0	1,000	110.00
DELTALIFE	133.3	133.3	3.0	745	99.30
IPDC	59.0	56.4	8.0	1,634	95.48
AL-HAJTEX	135.0	126.0	46.0	645	83.12
PRIMEINSUR	86.0	82.8	5.0	584	49.84
PADMALIFE	50.0	50.0	1.0	800	40.00
ACMEPL	35.6	35.6	1.0	238	8.47
FORTUNE	84.7	78.0	2.0	100	8.27
HRTEX	126.0	120.3	7.0	63	7.68
CNATEX	10.6	10.6	3.0	598	6.34

\*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
BSC	110.0	110.0	110.0	1,000	2
DELTALIFE	133.3	133.3	99.3	745	3
IPDC	59.0	56.4	95.5	1,634	8
AL-HAJTEX	135.0	126.0	83.1	645	46
PRIMEINSUR	86.0	82.8	49.8	584	5
PADMALIFE	50.0	50.0	40.0	800	1
ACMEPL	35.6	35.6	8.5	238	1
FORTUNE	84.7	78.0	8.3	100	2
HRTEX	126.0	120.3	7.7	63	7
CNATEX	10.6	10.6	6.3	598	3
SALVOCHEM	68.4	63.5	6.0	92	3
KAY&QUE	241.0	241.0	5.2	22	1
SUNLIFEINS	61.0	59.0	4.0	67	2
ECABLES	189.0	189.0	3.8	20	1
VFSTDL	24.6	23.5	3.7	156	4
PRIMETEX	46.7	42.5	3.7	84	3
GOLDENSON	19.8	19.0	3.3	171	3
INTRACO	29.4	29.2	2.7	93	3
SEAPEARL	46.0	46.0	2.3	50	1
MLDYEING	25.0	25.0	2.1	85	1
LHBL	66.1	66.1	2.0	30	2
SPCERAMICS	44.0	44.0	2.0	44	1
<b>Total</b>			<b>560.0</b>		<b>117</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**
**SKICL**

**(Q2 Un-audited):** EPS was Tk. 0.91 for April-June 2022 as against Tk. 1.25 for April-June 2021; EPS was Tk. 1.85 for January-June 2022 as against Tk. 2.75 for January-June 2021. NOCFPS was Tk. 4.02 for January-June 2022 as against Tk. 2.84 for January-June 2021. NAV per share was Tk. 19.22 as on June 30, 2022 and 18.71 as on June 30, 2021. EPS has been decreased due to increase the paid up shares from 2,40,00,000 to 4,00,00,000. NOCFPS has been increased due to increase the gross premium income.

**PIONEERINS**

**(Q2 Un-audited):** EPS was Tk. 1.67 for April-June 2022 as against Tk. 2.28 for April-June 2021; EPS was Tk. 3.70 for January-June 2022 as against Tk. 4.13 for January-June 2021. NOCFPS was Tk. 3.41 for January-June 2022 as against Tk. 3.12 for January-June 2021. NAV per share was Tk. 52.91 as on June 30, 2022 and Tk. 48.66 as on December 31, 2021. EPS has decreased mainly due to re-introduce of Agency Commission expenses as per IDRA's Circular dated October 24, 2021; which was suspended as per IDRA's Circulars no - 84/2021, dated February 04, 2021.

**UNIONBANK**

**(Q2 Un-audited):** EPS was Tk. 0.44 for April-June 2022 as against Tk. 0.62 for April-June 2021; EPS was Tk. 0.78 for January-June 2022 as against Tk. 0.87 for January-June 2021. NOCFPS was Tk. 1.12 for January-June 2022 as against Tk. 1.07 for January-June 2021. NAV per share was Tk. 15.24 as on June 30, 2022 and Tk. 10.13 as on June 30, 2021.

**MERCANBANK**

**(Q2 Un-audited):** Consolidated EPS was Tk. 1.36 for April-June 2022 as against Tk. 1.32 for April-June 2021. Consolidated EPS was Tk. 2.22 for January-June 2022 as against Tk. 1.93 for January-June 2021. Consolidated NOCFPS was Tk. 8.18 for January-June 2022 as against Tk. 8.93 for January-June 2021. Consolidated NAV per share was Tk. 23.81 as on June 30, 2022 and Tk. 23.91 as on December 31, 2021.

The Company has informed that the Board of Directors has decided to purchase floor space measuring 4929 Sft. with 02 car parking at 2nd floor of Morshed Alam Complex, Chowmuhani, Begumganj, Noakhali presently used by Mercantile Bank Limited, Chowmuhani Branch, Noakhali at a total cost of BDT 8,15,00,000.00 (excluding the cost of registration and other related expenses) subject to obtaining approval from Bangladesh Bank.

**PRIMEINSUR**

Mr. Suranjan Ghosh, one of the Directors of the company, has further informed that he has completed his buying of 2,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 13.06.2022.

**PUBALIBANK**

Trouser Line Limited (where Mrs. Rana Laila Hafiz is the Director of Pubali Bank Ltd. and Managing Director of Trouser Line Limited), has expressed its intention to buy 20,00,000 shares of the Company at prevailing market price (in the Public Market) through Dhaka Stock Exchange.

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