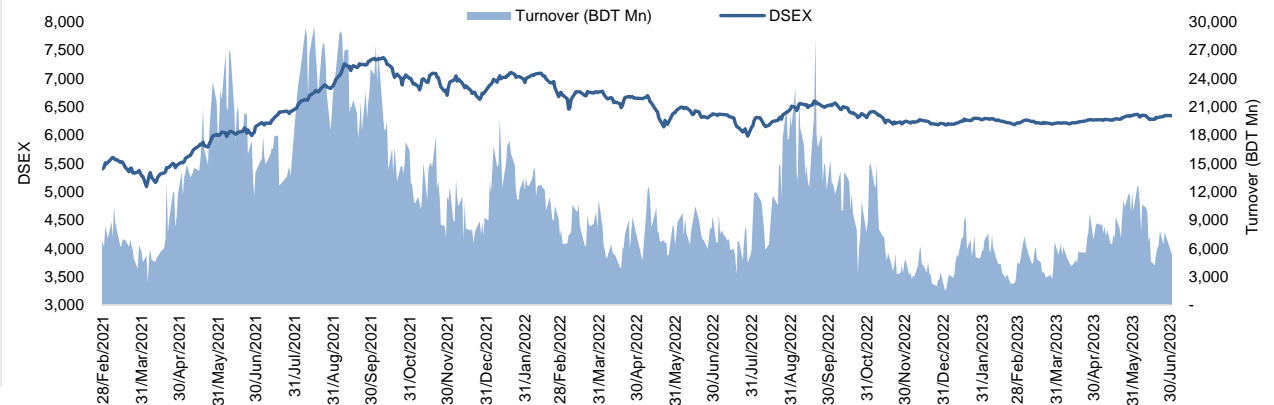


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.19%) lost 11.93 points and closed at 6,331.36. The blue-chip index DS30 (-0.02%), the Shariah-based index DSES (-0.18%), and the large-cap index CDSET (-0.05%) closed at 2,191.52, 1,373.83, and 1,211.29 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.18% followed by Pharmaceutical (-0.12%), Fuel & Power (-0.09%), Engineering (-0.09%), Bank (0.00%), Telecommunication (0.00%), and Food & Allied (+0.04%), respectively. Block trades contributed 7.2% of the overall market turnover. Fu Wang Food Ltd. (+2.6%) was the most traded share with a turnover of BDT 562 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,331.36	6,343.30	-11.93	-0.19%	+2.0%
DS30	2,191.52	2,191.94	-0.42	-0.02%	-0.2%
DSES	1,373.83	1,376.29	-2.46	-0.18%	+1.1%
CDSET	1,211.29	1,211.84	-0.55	-0.05%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	48	147	175	370
A Category (Equity)	23	85	131	239
B Category (Equity)	19	51	32	102
N Category (Equity)	0	4	1	5
Z Category (Equity)	6	7	11	24
Mutual Funds	1	3	29	33
Corporate Bonds	2	0	1	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,711,880	7,718,218	-0.1%
	Mn USD	70,946	71,005	
Turnover	Mn BDT	6,797	5,158	+31.8%
	Mn USD	63	47	
Volume	Mn Shares	196	168	+16.6%
No. of Trade		169,384	138,587	+22.2%

\* Average Interbank Exchange Rate is BDT 108.70 as of Jul 02, 2023

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Figure: Sectorial Turnover (BDT Mn)

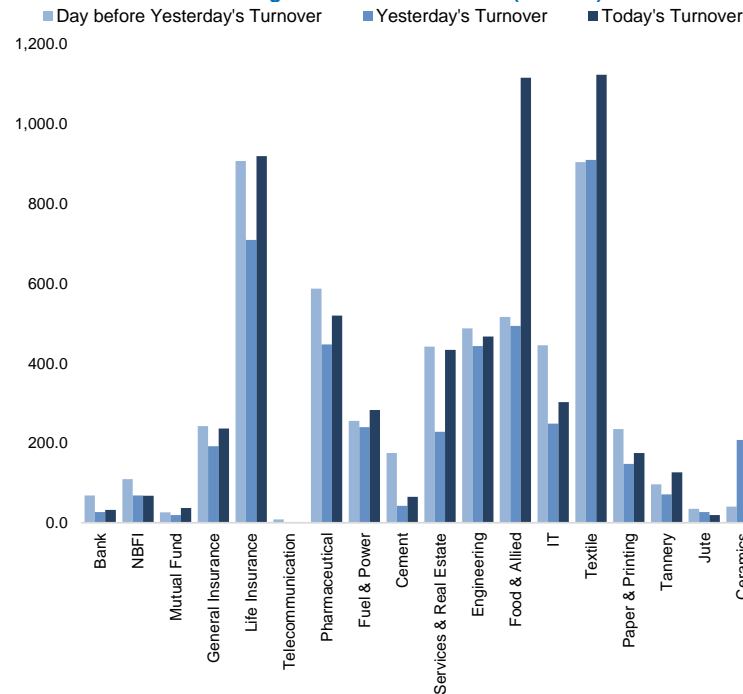
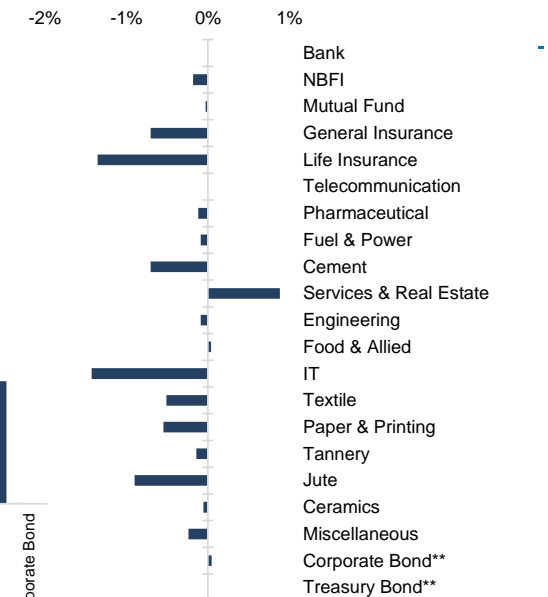


Figure: Sectorial Mcap Change



Market PE 18.4x

Market PB 1.5x

\* Market P/E calculation excludes NBL

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	1,443	1,443	-0.03	-0.00%	35	680,156	9.0%	32.5	0.5%	11.8x	0.7x	GP	386,996	8.5%	1.0	13.0x	7.2x
NBFI	1,922	1,926	-3.49	-0.18%	23	187,067	2.5%	67.7	1.1%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	831	832	-0.24	-0.03%	37	37,597	0.5%	37.2	0.6%	NM	0.7x	BATBC	280,098	6.2%	0.6	15.3x	6.9x
General Insurance	3,318	3,341	-23.46	-0.70%	42	96,832	1.3%	236.4	3.7%	17.7x	1.5x	SQURPHARMA	185,977	4.1%	3.0	9.9x	1.7x
Life Insurance	3,047	3,088	-41.78	-1.35%	15	85,156	1.1%	919.4	14.6%	NM	NM	ROBI	157,138	3.5%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.3	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.2	38.0x	4.6x
Pharmaceutical	3,709	3,714	-4.32	-0.12%	34	719,573	9.6%	519.3	8.2%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,704	1,706	-1.52	-0.09%	23	449,471	6.0%	283.1	4.5%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.3	12.0x	1.2x
Cement	2,531	2,549	-17.87	-0.70%	7	121,580	1.6%	65.3	1.0%	30.9x	2.6x	BERGERPBL	81,662	1.8%	0.8	27.1x	6.3x
Services & Real Esta	2,046	2,028	+17.88	+0.88%	8	80,825	1.1%	433.3	6.9%	27.5x	1.0x	LHBL	79,438	1.7%	45.2	14.7x	4.0x
Engineering	4,513	4,517	-3.97	-0.09%	42	529,681	7.0%	466.7	7.4%	72.4x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,608	21,600	+8.40	+0.04%	21	399,834	5.3%	1,115.6	17.7%	20.1x	8.2x	BXPHARMA	65,222	1.4%	0.4	14.6x	1.5x
IT	3,263	3,310	-47.18	-1.43%	11	42,543	0.6%	302.5	4.8%	29.8x	3.1x	BRACBANK	57,596	1.3%	0.2	9.0x	0.9x
Textile	1,652	1,660	-8.44	-0.51%	58	172,933	2.3%	1,123.1	17.8%	85.2x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,878	10,938	-59.68	-0.55%	6	41,913	0.6%	175.2	2.8%	40.4x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.9x	0.8x
Tannery	3,274	3,279	-4.57	-0.14%	6	34,583	0.5%	126.7	2.0%	49.8x	3.4x	DUTCHBANGL	44,203	1.0%	0.2	7.6x	1.0x
Jute	15,062	15,199	-136.54	-0.90%	3	3,685	0.0%	19.6	0.3%	NM	-1279.1x	TITASGAS	40,459	0.9%	0.1	32.0x	0.6x
Ceramics	696	696	-0.39	-0.06%	5	32,178	0.4%	73.6	1.2%	48.6x	1.9x	UNILEVERCL	39,873	0.9%	0.6	45.3x	13.2x
Miscellaneous	4,154	4,164	-9.96	-0.24%	14	226,187	3.0%	307.2	4.9%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.04	+0.05%	10	36,601	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	-	-	236	2,964,790	39.4%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PRIMETEX	32.1	+9.9%	65.9	NM	0.5x
SONARGAON	39.9	+9.9%	56.5	NM	3.5x
SHYAMPUSUG	115.0	+9.8%	14.9	NM	NM
ZEALBANGLA	150.4	+8.3%	4.2	NM	NM
SAFKOSPINN	22.4	+6.2%	25.4	NM	1.2x
OAL	13.3	+5.6%	76.9	NM	1.1x
RAHIMAFOD	252.1	+5.1%	91.2	NM	24x
SEAPEARL	223.8	+4.9%	247.1	32.4x	13.0x
LEGACYFOOT	112.2	+4.5%	96.4	NM	12.6x
MONNOAGML	1,058.4	+3.9%	31.2	NM	6.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ZAHEENSPIN	11.0	-7.6%	63.7	NM	2.2x
CNATEX	10.7	-6.1%	37.8	NM	1x
PDL	10.0	-5.7%	31.0	NM	0.7x
ETL	10.5	-5.4%	21.8	95.5x	0.8x
MEGHNALIFE	101.9	-5.2%	163.0	NM	NM
CENTRALPHL	11.7	-4.9%	14.8	NM	2.0x
GENNEXT	6.4	-4.5%	45.4	NM	0.5x
KEYACOSMET	6.5	-4.4%	35.9	NM	0.5x
PRIMELIFE	82.7	-4.4%	137.7	NM	NM
ZAHINTEX	9.0	-4.3%	11.2	NM	0.7x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.1%	9.9x	1.7x
BATBC	74,086	4.3%	15.3x	6.9x
BEXIMCO	69,196	4.0%	12.0x	1.2x
RENATA	68,042	4.0%	38.0x	4.6x
BXPHARMA	45,564	2.6%	14.6x	1.5x
BEACONPHAR	39,617	2.3%	80.9x	9.2x
GP	38,700	2.2%	13.0x	7.2x
BRACBANK	30,976	1.8%	9.0x	0.9x
LHBL	26,980	1.6%	14.7x	4.0x
EBL	24,998	1.5%	6.9x	0.9x
OLYMPIC	19,683	1.1%	18.4x	3.0x
NBL	19,116	1.1%	NM	0.7x
PUBALIBANK	18,314	1.1%	4.7x	0.6x
CITYBANK	18,211	1.1%	5.5x	0.8x
SEAPEARL	16,847	1.0%	32.4x	13.0x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	15,220	0.9%	15.0x	1.1x
PRIMEBANK	14,248	0.8%	5.6x	0.7x
BSRMLTD	14,210	0.8%	NM	0.7x
UPGDCL	13,547	0.8%	16.7x	4.4x

\* 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  
Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOI	24.1	+2.6%	562.1	NM	6.1x
SEAPEARL	223.8	+4.9%	247.1	32.4x	13.0x
RUPALILIFE	243.4	+2.2%	237.4	NM	NM
JHRML	83.7	+1.9%	201.7	36.2x	2.7x
ALIF	13.3	-	201.5	25.8x	0.9x
MEGHNALIFE	101.9	-5.2%	163.0	NM	NM
INTRACO	48.0	-4.0%	162.8	31.9x	3.7x
KBPPWBIL	23.6	+2.6%	147.0	NM	2.0x
PRIMELIFE	82.7	-4.4%	137.7	NM	NM
UNIQUEHRL	72.0	-1.2%	103.9	12.6x	0.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RUPALILIFE	245.0	218.0	20.0	751	176.53
LRBDL	35.1	31.6	30.0	1,220	38.65
SQURPHARMA	207.9	207.1	26.0	103	21.26
SIMTEX	26.6	23.1	7.0	795	20.05
GP	262.0	261.6	33.0	75	19.66
FINEFOODS	115.0	109.0	2.0	142	15.54
SEAPEARL	224.0	224.0	1.0	63	14.00
AOL	36.4	32.9	5.0	353	12.23
MHSML	24.0	23.9	20.0	509	12.16
ORIONPHARM	80.5	79.5	3.0	149	11.94

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RUPALILIFE	245.0	218.0	176.5	751	20
LRBDL	35.1	31.6	38.6	1,220	30
SQURPHARMA	207.9	207.1	21.3	103	26
SIMTEX	26.6	23.1	20.1	795	7
GP	262.0	261.6	19.7	75	33
FINEFOODS	115.0	109.0	15.5	142	2
SEAPEARL	224.0	224.0	14.0	63	1
AOL	36.4	32.9	12.2	353	5
MHSMML	24.0	23.9	12.2	509	20
ORIONPHARM	80.5	79.5	11.9	149	3
HRTEX	116.1	105.9	11.8	107	11
SONALIPAPR	661.2	569.0	10.1	17	9
RDFOOD	50.1	50.0	9.6	192	3
INTRACO	47.2	47.0	8.9	188	3
GPHISPAT	40.4	40.4	5.7	141	10
MALEKSPIN	29.8	24.4	5.6	223	8
BBSCABLES	47.6	45.0	5.3	115	7
MATINSPINN	77.3	69.9	5.1	67	3
EMERALDOIL	133.0	133.0	4.9	37	1
MAKSONSPIN	20.2	20.1	4.6	231	8
BEXIMCO	114.1	104.1	3.7	33	4
JMISMDL	277.8	277.8	3.4	12	1
<b>Total</b>			<b>491.6</b>		<b>307</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PURABIGEN		3.0%	7%	Record Date	10-Jul-23
SONARBAINS		5.0%	10%	Record Date	20-Jul-23
PRAGATILIF		0.0%	12%	Record Date	20-Jul-23
UNIONINS		0.0%	10%	Record Date	23-Jul-23
ICICL		0.0%	10%	Record Date	23-Jul-23
EIL		0.0%	7%	Record Date	24-Jul-23
PRIMEINSUR		0.0%	10%	Record Date	30-Jul-23

#### Important DSE News

##### NAVANAPHAR

The company has informed that the Board of Directors of the company has approved and recommended to change the Use of Proceeds of IPO regarding Construction of new General Production Building, which constitutes Tk. 23.24 Cr. (31%) of the total IPO proceeds of Tk. 75 Cr., and replace it with Modernization and Expansion of the small volume parenterals and ophthalmics (SVPO) Facility for Tk. 13.12 Cr. along with similar Modernization and Expansion of General Liquid Facility with dispensing Area for Tk. 4.68 Cr., Modernization and expansion of Animal Health Facility for Tk. 5.44 Cr. and modernization of PD & Quality Control for Tk. 2.34 Cr. (to be financed from company's own source) totaling Tk. 25.57 Cr. The Board resolved this after appropriate market assessment, and due to the delay in getting products to market after building the entirely new production facility, and to immediately meet up the demand for the Company's products. The balance Use of Proceeds of the IPO remains the same, with 52% of the Use of Proceeds already completed. This is subject to obtaining approval from the shareholders of the Company in its upcoming 6th Extra Ordinary General Meeting scheduled to be held on July 31, 2023 and Bangladesh Securities and Exchange Commission (BSEC).

##### GQBALLPEN

The Company has informed that the Board of Directors has decided that Mr. Uzzal Kumar Saha, Company Secretary shall hold the current charge of Managing Director and Mr. K.M. Ershad, Manager (Admin & Share) the current charge of Company Secretary with effect from July 01, 2023 till further order.

##### SINGERBD

The company has informed that the Board of Directors has appointed Mr. Yigit Emre Senolur as Finance Director and Chief Financial Officer of the company with effect from July 02, 2023, subject to the receiving necessary amendment of the work permit from BIDA.

##### EXIMBANK

The company has informed that it has got the permission from regulatory authority for investment (overdrawn) facility equivalent to GBP 5.00 (five) lac to EXIM Exchange Company (UK) Ltd., a fully owned subsidiary of the company. The investment (overdrawn) facility will facilitate execution of inward remittance in time.

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