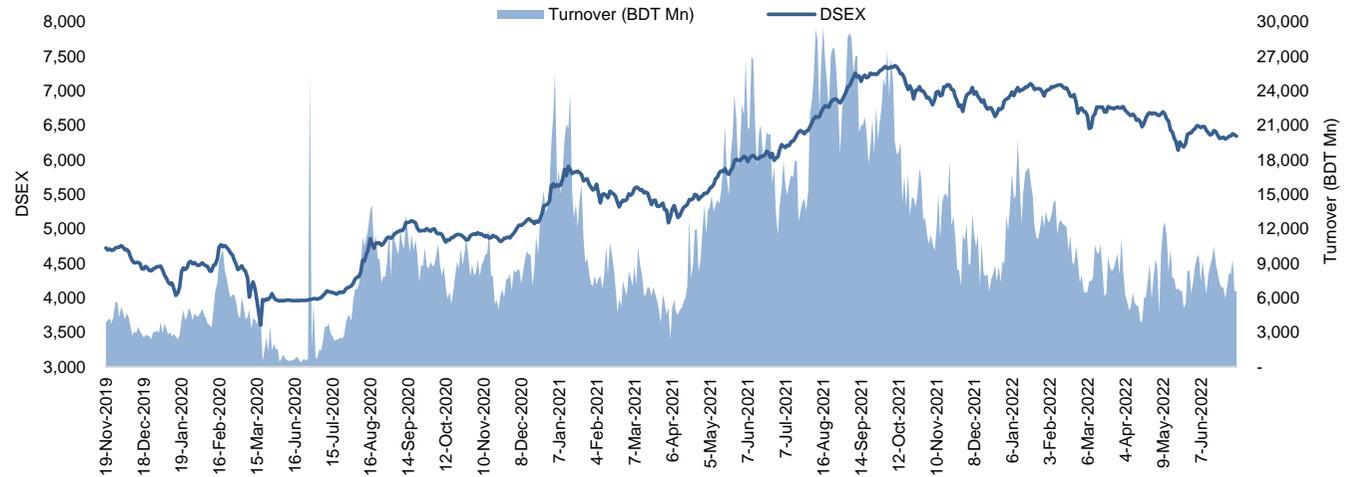


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.20%) lost 12.9 points and closed at 6,346.88. The blue-chip index DS30 (-0.32%), the Shariah-based index DSES (+0.03%), and the large-cap index CDSET (-0.27%) closed at 2,283.95, 1,385.16, and 1,256.04 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.63% followed by Engineering (-0.26%), Fuel & Power (-0.26%), Food & Allied (-0.22%), Pharmaceutical (-0.07%), NBF1 (+0.07%), and Telecommunication (+1.51%), respectively. Block trades contributed 1.4% of the overall market turnover. Robi Axiata Limited (+10.0%) was the most traded share with a turnover of BDT 278 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,346.88	6,359.78	-12.90	-0.20%	-6.1%
DS30	2,283.95	2,291.21	-7.26	-0.32%	-9.8%
DSES	1,385.16	1,384.75	+0.42	+0.03%	-3.2%
CDSET	1,256.04	1,259.49	-3.45	-0.27%	-7.6%

	Advanced	Declined	Unchanged	Total
All Category	149	182	50	381
A Category (Equity)	89	142	31	262
B Category (Equity)	40	34	15	89
N Category (Equity)	4	3	0	7
Z Category (Equity)	16	3	4	23
Mutual Funds	11	11	13	35
Corporate Bonds	0	2	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,172,555	5,172,429	
	Mn USD	55,351	55,350	+0.0%
Turnover	Mn BDT	6,626	6,548	+1.2%
	Mn USD	71	70	
Volume	Mn Shares	191	164	+16.2%
No. of Trade		262,953	160,308	+64.0%

* Exchange Rate is BDT 93.45 as of Jul 04, 2022

Figure: Sectorial Turnover (BDT)

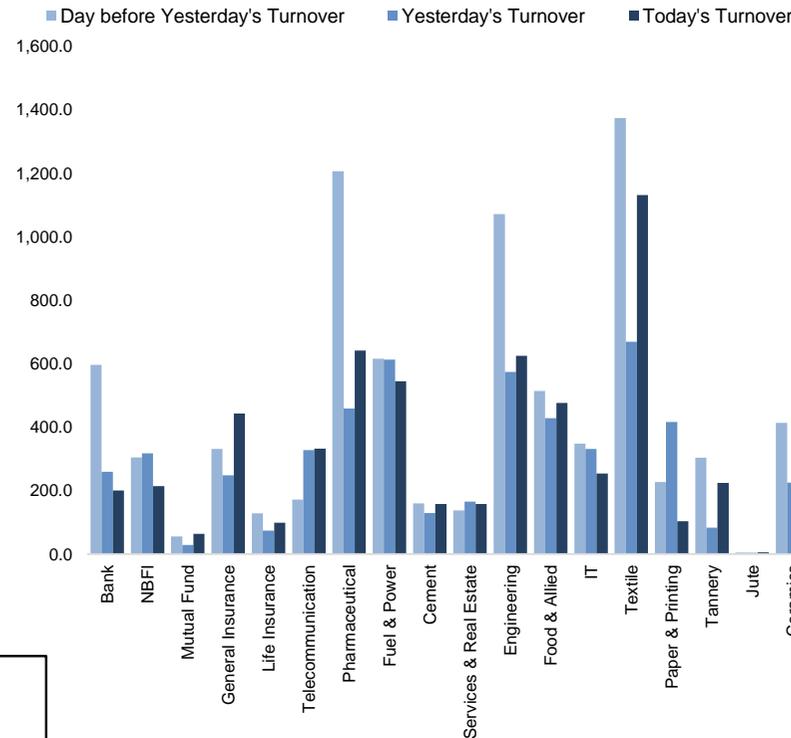
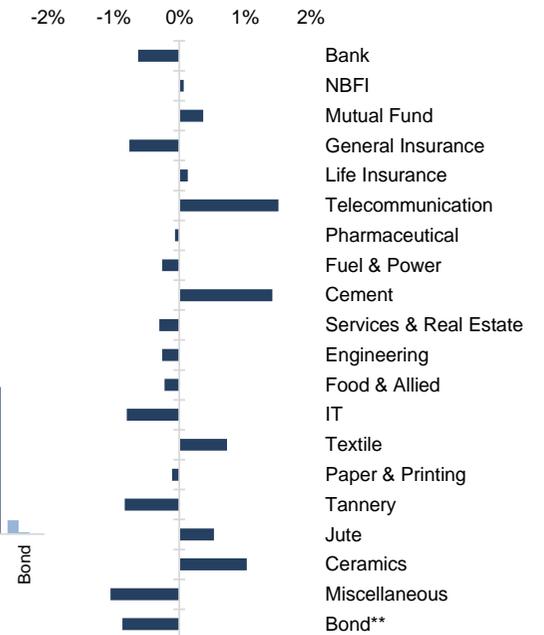


Figure: Sectorial Mcap Change



Market PE 15.9x
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	1,447	1,456	-9.13	-0.63%	33	670,214	14.7%	200.5	3.1%	7.9x	0.8x	GP	381,595	8.4%	26.2	11.5x	6.6x
NBFI	2,001	2,000	+1.38	+0.07%	23	196,881	4.3%	214.5	3.3%	NM	3.6x	WALTONHIL	325,981	7.2%	3.7	22.8x	3.3x
Mutual Fund	884	881	+3.19	+0.36%	36	39,124	0.9%	63.6	1.0%	NM	0.8x	BATBC	291,978	6.4%	48.6	19.1x	8.9x
General Insurance	3,380	3,406	-25.94	-0.76%	41	100,363	2.2%	442.5	6.9%	16.0x	1.6x	SQURPHARMA	191,119	4.2%	75.2	10.3x	1.9x
Life Insurance	2,302	2,299	+2.97	+0.13%	13	64,666	1.4%	99.0	1.5%	NM	NM	ROBI	190,661	4.2%	278.0	NM	2.9x
Telecommunication	5,164	5,087	+76.85	+1.51%	3	608,799	13.4%	332.2	5.2%	16.2x	4.5x	UPGDCL	144,112	3.2%	11.2	11.7x	4.4x
Pharmaceutical	3,758	3,761	-2.45	-0.07%	32	705,463	15.5%	641.6	10.0%	17.4x	2.5x	RENATA	142,770	3.1%	4.3	25.8x	5.0x
Fuel & Power	1,808	1,813	-4.70	-0.26%	23	471,714	10.3%	544.2	8.5%	11.8x	1.2x	BEXIMCO	113,220	2.5%	190.2	7.9x	1.5x
Cement	2,490	2,455	+34.81	+1.42%	7	121,938	2.7%	157.5	2.5%	25.9x	2.6x	LHBL	82,574	1.8%	109.7	21.8x	4.7x
Services & Real Estate	1,431	1,435	-4.38	-0.31%	8	54,386	1.2%	157.5	2.5%	75.7x	1.0x	ICB	80,984	1.8%	10.5	45.8x	1.8x
Engineering	4,678	4,690	-12.23	-0.26%	42	546,961	12.0%	624.2	9.7%	19.0x	1.9x	BERGERPBL	80,419	1.8%	0.5	27.7x	7.6x
Food & Allied	21,997	22,046	-49.33	-0.22%	21	391,054	8.6%	475.8	7.4%	23.9x	9.1x	MARICO	75,518	1.7%	2.3	21.2x	28.1x
IT	2,670	2,691	-21.56	-0.80%	11	33,784	0.7%	254.2	4.0%	27.5x	2.4x	BXPBARMA	68,344	1.5%	17.9	11.9x	1.7x
Textile	1,602	1,590	+11.56	+0.73%	58	173,055	3.8%	1,130.9	17.6%	26.0x	1.1x	BRACBANK	59,863	1.3%	27.9	11.3x	1.1x
Paper & Printing	7,918	7,926	-8.52	-0.11%	6	28,330	0.6%	103.5	1.6%	NM	1.9x	BEACONPHAR	58,674	1.3%	8.3	62.7x	10.1x
Tannery	3,216	3,243	-26.96	-0.83%	6	34,326	0.8%	224.1	3.5%	48.5x	3.4x	ISLAMIBANK	52,164	1.1%	5.4	10.6x	0.8x
Jute	8,658	8,613	+45.31	+0.53%	3	1,993	0.0%	5.4	0.1%	NM	28.1x	DUTCHBANGL	44,806	1.0%	4.5	7.8x	1.2x
Ceramics	802	794	+8.15	+1.03%	5	36,104	0.8%	278.5	4.3%	33.9x	2.2x	TITASGAS	41,646	0.9%	125.7	12.5x	0.6x
Miscellaneous	4,371	4,417	-46.24	-1.05%	15	242,736	5.3%	463.2	7.2%	11.9x	2.1x	POWERGRID	40,412	0.9%	20.6	11.0x	0.4x
Bond**	91	92	-0.80	-0.87%	9	37,909	0.8%	1.8	0.0%	NM	NM	SUMITPOWER	39,939	0.9%	10.3	9.5x	1.1x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ZAHEENSPIN	12.1	+10.0%	57.9	NM	2.1x
ROBI	36.4	+10.0%	278.0	NM	2.9x
ECABLES	161.5	+9.9%	26.6	NM	19.5x
SHYAMPSUG	119.5	+9.9%	16.0	NM	NM
PRIMETEX	36.6	+9.9%	92.9	11.4x	0.5x
INTRACO	29.5	+9.7%	227.7	28.2x	2.5x
SAVAREFR	248.0	+8.2%	4.6	NM	3542.9x
KBPPWBIL	14.3	+6.7%	34.7	NM	1.2x
MLDYEING	24.5	+6.5%	42.0	83.0x	1.6x
MEGCONMILK	29.6	+6.5%	10.2	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	125,049	7.3%	10.3x	1.9x
BATBC	77,228	4.5%	19.1x	8.9x
BEXIMCO	75,461	4.4%	7.9x	1.5x
RENATA	69,572	4.1%	25.8x	5.0x
BXPBARMA	47,718	2.8%	11.9x	1.7x
BEACONPHAR	41,072	2.4%	62.7x	10.1x
GP	38,159	2.2%	11.5x	6.6x
BRACBANK	32,183	1.9%	11.3x	1.1x
LHBL	29,165	1.7%	21.8x	4.7x
ISLAMIBANK	25,393	1.5%	10.6x	0.8x
EBL	24,575	1.4%	7.4x	1.1x
ROBI	19,066	1.1%	NM	2.9x
NBL	18,422	1.1%	NM	0.5x
PUBALIBANK	18,314	1.1%	5.9x	0.7x
CITYBANK	18,261	1.1%	5.1x	0.8x
BSRMLTD	15,699	0.9%	5.4x	0.7x
OLYMPIC	15,610	0.9%	17.0x	2.7x
ALARABANK	15,599	0.9%	11.5x	1.1x
SUMITPOWER	14,693	0.9%	9.5x	1.1x
UPGDCL	14,411	0.8%	11.7x	4.4x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ROBI	36.4	+10.0%	278.0	NM	2.9x
SPCERAMICS	52.6	+3.5%	242.5	NM	1.7x
MEGHNAINS	57.3	+5.7%	237.8	79.2x	4.0x
INTRACO	29.5	+9.7%	227.7	28.2x	2.5x
BEXIMCO	129.2	-1.6%	190.2	7.9x	1.5x
FORTUNE	90.1	-1.5%	184.8	29.1x	6.0x
FUWANGFOOC	25.2	+2.9%	138.7	NM	2.2x
TITASGAS	42.1	+0.2%	125.7	12.5x	0.6x
ACIFORMULA	164.4	+2.5%	122.8	27.8x	2.5x
LHBL	71.1	+2.0%	109.7	21.8x	4.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
TRUSTBANK	34.3	-2.0%	0.3	8.3x	1.2x
PROGRESLIF	78.5	-2.0%	4.3	NM	NM
MONOSPOOL	162.7	-2.0%	5.0	53.5x	3.9x
APEXFOOT	267.2	-2.0%	14.3	24.0x	1.1x
UNIONBANK	9.9	-2.0%	6.6	6.7x	0.7x
NAVANACNG	29.7	-2.0%	2.7	NM	0.9x
GP	282.6	-2.0%	26.2	11.5x	6.6x
PAPERPROC	173.9	-2.0%	5.2	57.0x	5.9x
ASIAPACINS	50.0	-2.0%	2.0	21.3x	2.2x
FIRSTFIN	5.0	-2.0%	0.3	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ACFL	27.9	27.8	13.0	1,678	46.80
AL-HAJTEX	121.1	120.5	8.0	162	19.65
ACIFORMULA	176.0	165.0	2.0	98	16.29
YPL	25.1	22.5	7.0	663	15.39
PADMALIFE	49.3	49.3	1.0	300	14.79
PRIMEINSUR	102.0	101.0	2.0	110	11.21
SQURPHARMA	220.0	215.2	3.0	33	7.14
IMAMBUTTON	133.5	133.5	4.0	50	6.73
OLYMPIC	130.0	130.0	2.0	50	6.50
BATBC	542.0	540.0	2.0	11	5.68

*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
ACFL	27.9	27.8	46.8	1,678	13
AL-HAJTEX	121.1	120.5	19.7	162	8
ACIFORMULA	176.0	165.0	16.3	98	2
YPL	25.1	22.5	15.4	663	7
PADMALIFE	49.3	49.3	14.8	300	1
PRIMEINSUR	102.0	101.0	11.2	110	2
SQURPHARMA	220.0	215.2	7.1	33	3
IMAMBUTTON	133.5	133.5	6.7	50	4
OLYMPIC	130.0	130.0	6.5	50	2
BATBC	542.0	540.0	5.7	11	2
HRTEX	101.0	101.0	5.1	50	2
SALVOCHEM	66.0	66.0	5.0	75	2
MPETROLEUM	204.9	204.9	4.7	23	2
AMANFEED	34.9	34.9	4.6	131	2
BRACBANK	39.9	39.9	4.3	108	4
PRIMETEX	34.5	32.8	3.7	111	4
ZAHEENSPIN	11.4	11.4	3.1	276	2
ORIONINFU	93.0	88.5	2.4	27	2
MARICO	2,395.0	2,395.0	2.2	1	1
JANATAINS	35.2	35.2	2.1	60	1
RENATA	1,327.0	1,327.0	2.0	2	1
HFL	25.6	25.0	2.0	78	2
Total			211.5		91

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Janata Insurance Company Ltd.	-	5.0%	6.0%	Record Date	07-Jul-22
Bangladesh General Insurance Company Ltd.	-	0.0%	12.5%	Record Date	07-Jul-22
Pragati Life Insurance Ltd.	-	6.0%	11.0%	Record Date	07-Jul-22
Prime Insurance Company Ltd.	-	0.0%	15.0%	Record Date	12-Jul-22
NRB Commercial Bank Limited	-	7.5%	0.0%	Record Date	13-Jul-22
Union Insurance Company Limited	-	0.0%	5.0%	Record Date	20-Jul-22
Express Insurance Limited	-	0.0%	10.0%	Record Date	21-Jul-22
Purabi Gen. Insurance Company Ltd.	-	0.0%	10.0%	Record Date	25-Jul-22
Bangladesh Industrial Fin. Co. Ltd.	-	0.0%	0.0%	Record Date	25-Jul-22
National Life Insurance Company Ltd.	-	0.0%	35.0%	Record Date	28-Jul-22
Kay & Que (Bangladesh) Ltd.	-	0.0%	5.0%	Record Date	Notify later

Important DSE News
TITASGAS

Refer to their earlier news disseminated by DSE on 30.06.2022 regarding Distribution and Transmission Charges, the Transmission charge would be BDT 0.4778 instead of BDT 04778 for per cubic meter. Other information will remain unchanged.

ROBI

The Company has informed that they have entered into an agreement for Term Loan with Dutch Bangla Bank Limited for an amount of BDT 4,000.00 million with a duration of 3 years. The Company has also informed that they did not pledge any asset as security and did not create any charge with RJSC in relation to this Loan Agreement.

MERCANBANK

Mrs. Bilkis Begum, one of the Sponsors of the Company, has further informed that she has completed her sale of 3,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 20.06.2022.

ECABLES

The Company has informed that they have signed an agreement with China National Technical Imp. & Exp. Corpo. for the supply of Aluminium Wire. The Company also informed that the Contract value is 4.20 million USD.

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