

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.04%) gained 2.75 points and closed at 6,334.11. The blue-chip index DS30 (+0.09%), the Shariah-based index DSES (+0.05%), and the large-cap index CDSET (+0.07%) closed at 2,193.53, 1,374.48, and 1,212.11 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 0.36% followed by Bank (+0.32%), Food & Allied (+0.13%), Pharmaceutical (+0.06%), Engineering (+0.02%), Telecommunication (0.00%), and Fuel & Power (-0.03%), respectively. Block trades contributed 5.2% of the overall market turnover. Fu Wang Food Ltd. (+10.0%) was the most traded share with a turnover of BDT 418 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,334.11	6,331.36	+2.75	+0.04%	+2.1%
DS30	2,193.53	2,191.52	+2.01	+0.09%	-0.1%
DSES	1,374.48	1,373.83	+0.65	+0.05%	+1.2%
CDSET	1,212.11	1,211.29	+0.82	+0.07%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	74	120	180	374
A Category (Equity)	30	75	134	239
B Category (Equity)	38	34	33	105
N Category (Equity)	1	3	1	5
Z Category (Equity)	5	8	12	25
Mutual Funds	1	1	27	29
Corporate Bonds	0	1	1	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,714,808	7,711,880	+0.0%
	Mn USD	70,898	70,871	
Turnover	Mn BDT	6,003	6,797	-11.7%
	Mn USD	55	62	
Volume	Mn Shares	179	196	-8.9%
No. of Trade		154,147	169,384	-9.0%

* Average Interbank Exchange Rate is BDT 108.82 as of Jul 03, 2023

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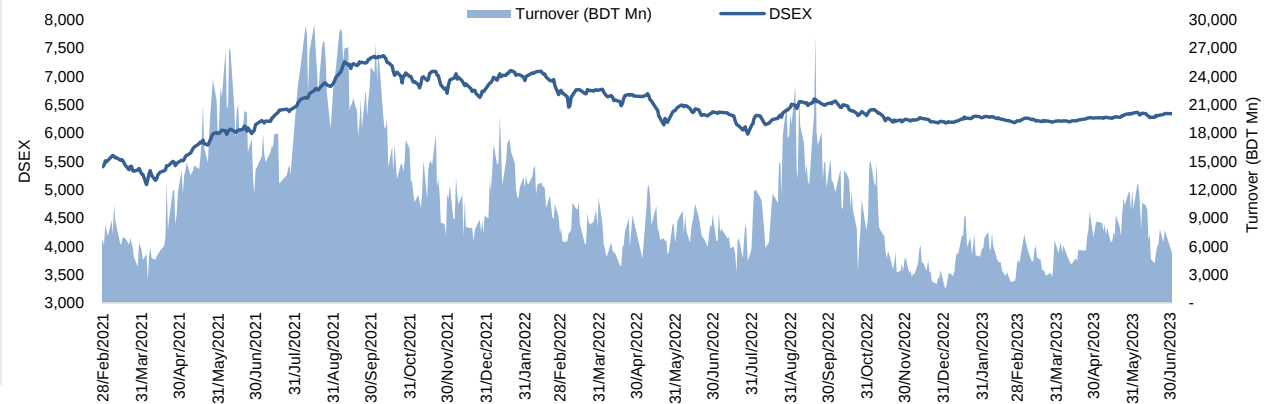


Figure: Sectorial Turnover (BDT Mn)

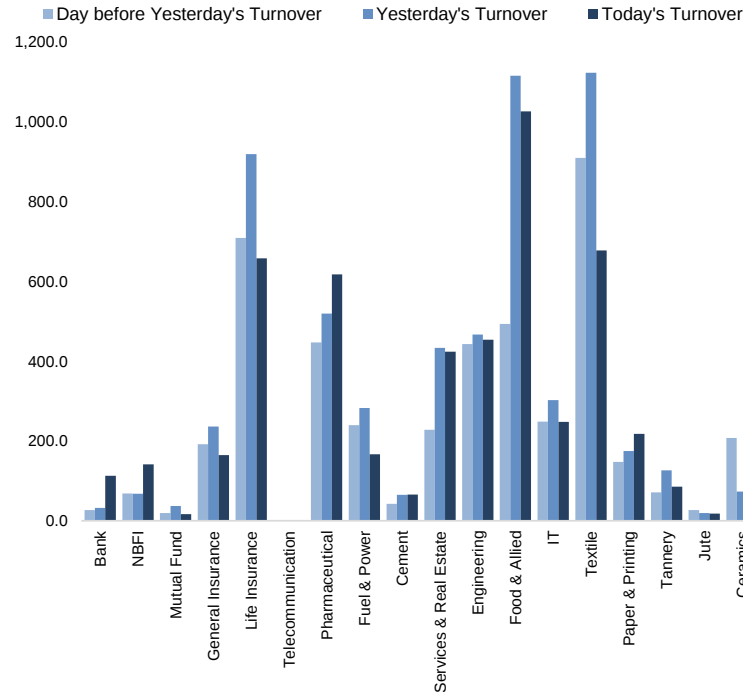
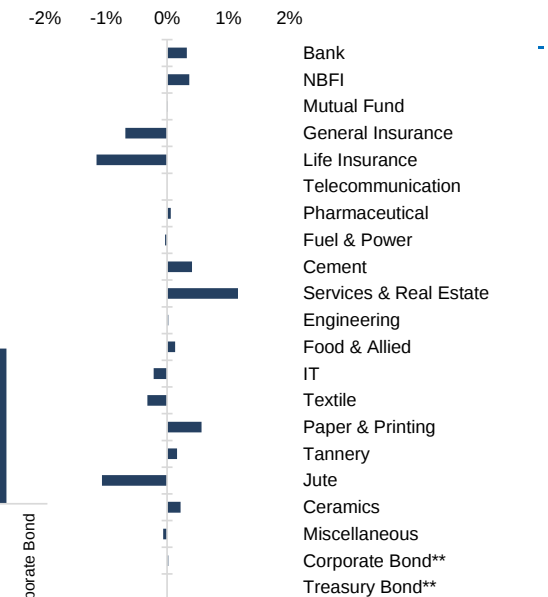


Figure: Sectorial Mcap Change



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	1,448	1,443	+4.67	+0.32%	35	682,356	9.1%	113.1	2.0%	11.9x	0.7x	GP	386,996	8.5%	0.3	13.0x	7.2x
NBFI	1,929	1,922	+6.99	+0.36%	23	187,747	2.5%	141.4	2.5%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	831	+0.10	+0.01%	37	37,602	0.5%	16.3	0.3%	NM	0.7x	BATBC	280,098	6.1%	1.1	15.3x	6.9x
General Insurance	3,295	3,318	-22.67	-0.68%	42	96,171	1.3%	164.9	2.9%	17.6x	1.5x	SQURPHARM ^a	185,977	4.1%	1.8	9.9x	1.7x
Life Insurance	3,012	3,047	-35.12	-1.15%	15	84,174	1.1%	657.8	11.6%	NM	NM	ROBI	157,138	3.4%	0.3	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.7	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,712	3,709	+2.17	+0.06%	34	719,995	9.6%	617.7	10.9%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,703	1,704	-0.54	-0.03%	23	449,328	6.0%	166.4	2.9%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,542	2,531	+10.36	+0.41%	7	122,078	1.6%	65.7	1.2%	31.0x	2.6x	BERGERPBL	81,273	1.8%	0.7	27.0x	6.3x
Services & Real Esta	2,069	2,046	+23.70	+1.16%	8	81,761	1.1%	423.9	7.5%	27.8x	1.1x	LHBL	80,135	1.8%	46.1	14.8x	4.0x
Engineering	4,514	4,513	+0.87	+0.02%	42	529,783	7.0%	454.1	8.0%	72.5x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,637	21,608	+28.50	+0.13%	21	400,361	5.3%	1,026.8	18.1%	20.1x	8.2x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,256	3,263	-7.19	-0.22%	11	42,449	0.6%	247.6	4.4%	29.7x	3.1x	BRACBANK	57,596	1.3%	0.2	9.0x	0.9x
Textile	1,646	1,652	-5.33	-0.32%	58	172,375	2.3%	678.1	11.9%	84.9x	1.1x	BEACONPHAR	56,595	1.2%	0.1	80.9x	9.2x
Paper & Printing	10,940	10,878	+61.46	+0.56%	6	42,150	0.6%	217.7	3.8%	40.6x	2.1x	ISLAMIBANK	52,486	1.2%	0.3	8.9x	0.8x
Tannery	3,280	3,274	+5.39	+0.16%	6	34,640	0.5%	85.2	1.5%	49.9x	3.4x	DUTCHBANGL	44,203	1.0%	5.5	7.6x	1.0x
Jute	14,902	15,062	-160.40	-1.06%	3	3,645	0.0%	18.3	0.3%	NM	-1265.5x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	697	696	+1.53	+0.22%	5	32,249	0.4%	203.5	3.6%	48.7x	1.9x	UNILEVERCL	40,173	0.9%	2.7	45.6x	13.3x
Miscellaneous	4,152	4,154	-2.67	-0.06%	14	226,041	3.0%	389.0	6.8%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.02	+0.02%	10	36,593	0.5%	0.0	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	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					
UNIONCAP	9.9	+10.0%	37.4	NM	NM	SQURPHARMA	121,499	7.1%	9.9x	1.7x	FUWANGFOOD	26.5	+10.0%	418.3	NM	6.7x					
FUWANGFOOD	26.5	+10.0%	418.3	NM	6.7x	BATBC	74,086	4.3%	15.3x	6.9x	KBPPWBIL	25.9	+9.7%	279.8	NM	2.2x					
RUPALIBANK	27.7	+9.9%	20.0	35.3x	0.8x	BEXIMCO	69,196	4.0%	12.0x	1.2x	SEAPEARL	231.9	+3.6%	277.8	33.6x	13.4x					
OAL	14.6	+9.8%	93.8	NM	1.2x	RENATA	68,042	4.0%	38.0x	4.6x	JHRML	85.6	+2.3%	202.6	37.0x	2.7x					
KBPPWBIL	25.9	+9.7%	279.8	NM	2.2x	BXPHARMA	45,564	2.6%	14.6x	1.5x	FUWANGCER	19.6	+7.1%	165.9	75.4x	1.6x					
MIDLANDBNK	13.4	+8.1%	66.8	13.8x	1.0x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	RUPALILIFE	247.0	+1.5%	159.0	NM	NM					
FASFIN	5.8	+7.4%	19.8	NM	NM	GP	38,700	2.2%	13.0x	7.2x	EMERALDOIL	149.7	+3.0%	147.9	NM	NM					
DACCADYE	18.0	+7.1%	60.4	NM	0.5x	BRACBANK	30,976	1.8%	9.0x	0.9x	MEGHNALIFE	97.9	-3.9%	127.7	NM	NM					
FUWANGCER	19.6	+7.1%	165.9	75.4x	1.6x	LHBL	26,980	1.6%	14.8x	4.0x	NAVANAPHAR	116.0	+3.9%	123.4	26.3x	2.8x					
MIDASFIN	12.4	+6.9%	7.6	9.3x	1.3x	EBL	24,998	1.5%	6.9x	0.9x	GEMINISEA	796.6	-2.4%	96.1	38.0x	31.4x					
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	OLYMPIC	19,683	1.1%	18.3x	3.0x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
IMAMBUTTON	129.1	-6.0%	36.8	NM	26.8x	NBL	19,116	1.1%	NM	0.7x	RUPALILIFE	240.0	223.2	16.0	167	39.12					
ZEALBANGLA	141.7	-5.8%	1.5	NM	NM	PUBALIBANK	18,314	1.1%	4.7x	0.6x	GP	284.9	261.6	13.0	126	33.11					
PRIMETEX	30.3	-5.6%	29.1	NM	0.4x	CITYBANK	18,211	1.1%	5.5x	0.8x	AOL	38.2	32.9	17.0	845	28.70					
SAFKOSPINN	21.3	-4.9%	22.6	NM	1.1x	SEAPEARL	16,847	1.0%	33.6x	13.4x	RDFOOD	56.8	50.1	2.0	470	26.43					
CNATEX	10.2	-4.7%	45.2	NM	0.7x	ROBI	15,714	0.9%	85.7x	2.3x	BEACONPHAR	223.8	223.8	1.0	109	24.39					
PRIMELIFE	79.2	-4.2%	89.2	NM	NM	ALARABANK	15,220	0.9%	15.0x	1.1x	SALVOCHEM	64.3	64.2	3.0	320	20.55					
MEGHNAINS	44.4	-4.1%	22.4	28.8x	2.9x	PRIMEBANK	14,248	0.8%	5.7x	0.7x	ADNTEL	125.0	125.0	3.0	131	16.38					
MEGHNALIFE	97.9	-3.9%	127.7	NM	NM	BSRMLTD	14,210	0.8%	NM	0.7x	SIMTEX	24.5	24.5	2.0	500	12.25					
TAMIJTEX	185.7	-3.9%	19.9	27.4x	2.1x	UPGDCL	13,547	0.8%	16.7x	4.4x	SEAPEARL	228.0	209.2	7.0	51	11.49					
DGIC	29.8	-3.9%	7.3	33.1x	2.5x	* 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										LRBDL	32.7	31.7	20.0	341	10.96

^a 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.

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade	Important DSE News
RUPALILIFE	240.0	223.2	39.1	167	16	
GP	284.9	261.6	33.1	126	13	
AOL	38.2	32.9	28.7	845	17	
RDFOOD	56.8	50.1	26.4	470	2	
BEACONPHAR	223.8	223.8	24.4	109	1	
SALVOCHEM	64.3	64.2	20.5	320	3	
ADNTEL	125.0	125.0	16.4	131	3	
SIMTEX	24.5	24.5	12.3	500	2	
SEAPEARL	228.0	209.2	11.5	51	7	
LRBDL	32.7	31.7	11.0	341	20	
AL-HAJTEX	170.0	163.0	8.7	53	5	
EBL	29.2	29.2	5.8	200	3	
EGEN	45.0	40.8	4.8	108	2	
MARICO	2,397.0	2,345.0	4.1	2	4	
ORIONPHARM	71.7	71.7	3.6	50	7	
MAKSONSPIN	20.1	20.1	3.3	163	4	
NBL	8.0	8.0	3.2	400	3	
DOREENPWR	57.2	57.2	2.9	50	3	
SONALIPAPR	569.0	569.0	2.8	5	4	
KDSALTD	77.0	69.3	2.8	37	4	
MHSML	23.9	23.9	2.8	117	5	
BATBC	479.8	479.8	2.6	5	5	
Total			314.5		191	

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

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