

Daily Market Update

The market closed in green today. The benchmark index DSEX (+2.30%) gained 123.72 points and closed at 5,497.56. The blue-chip index DS30 (+2.01%), the Shariah-based index DSES (+1.87%), and the large-cap index CDSET (+1.83%) closed at 1,951.34, 1,208.70, and 1,056.17 points, respectively. All the large-cap sectors posted positive performance today. NBFi booked the highest gain of 4.55% followed by Telecommunication (+2.92%), Bank (+2.87%), Food & Allied (+2.51%), Fuel & Power (+2.24%), Pharmaceutical (+1.63%), and Engineering (+1.59%), respectively. Block trades contributed 9.4% of the overall market turnover. Orion Pharma Ltd. (+3.5%) was the most traded share with a turnover of BDT 275 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,497.56	5,373.84	+123.72	+2.30%	-12.0%
DS30	1,951.34	1,912.93	+38.40	+2.01%	-6.8%
DSES	1,208.70	1,186.55	+22.14	+1.87%	-11.4%
CDSET	1,056.17	1,037.16	+19.01	+1.83%	-12.2%

	Advanced	Declined	Unchanged	Total
All Category	365	14	17	396
A Category (Equity)	214	8	14	236
B Category (Equity)	98	3	1	102
N Category (Equity)	4	0	0	4
Z Category (Equity)	49	3	2	54
Mutual Funds	30	1	6	37
Corporate Bonds	1	0	0	1
Treasury Bonds	0	3	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,710,633	6,618,638	+1.4%
	Mn USD	56,870	56,090	
Turnover	Mn BDT	7,707	5,393	+42.9%
	Mn USD	65	46	
Volume	Mn Shares	274	170	+61.4%
No. of Trade		215,135	165,646	+29.9%

* Average Interbank Exchange Rate is BDT 118.00 as of Jul 04, 2024

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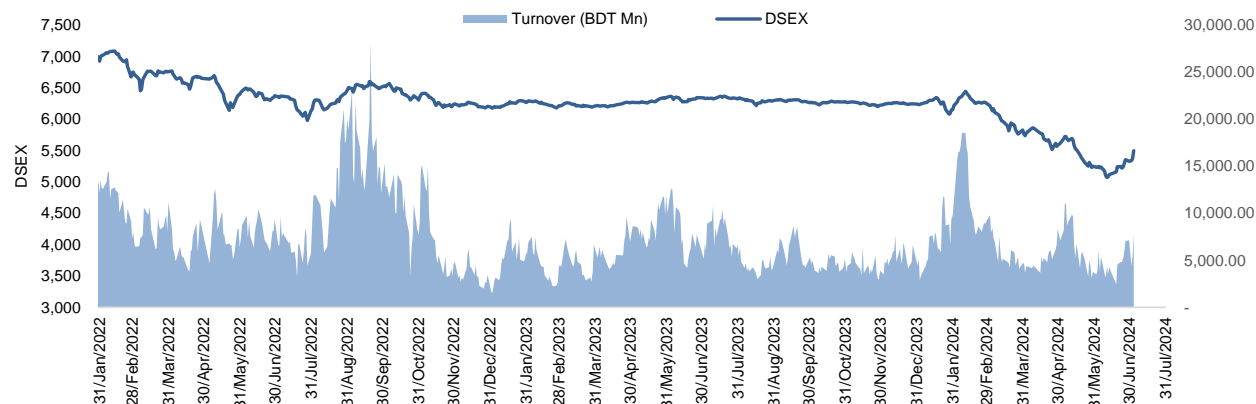


Figure: Sectorial Turnover (BDT Mn)

Day before Yesterday's Turnover Yesterday's Turnover Today's Turnover

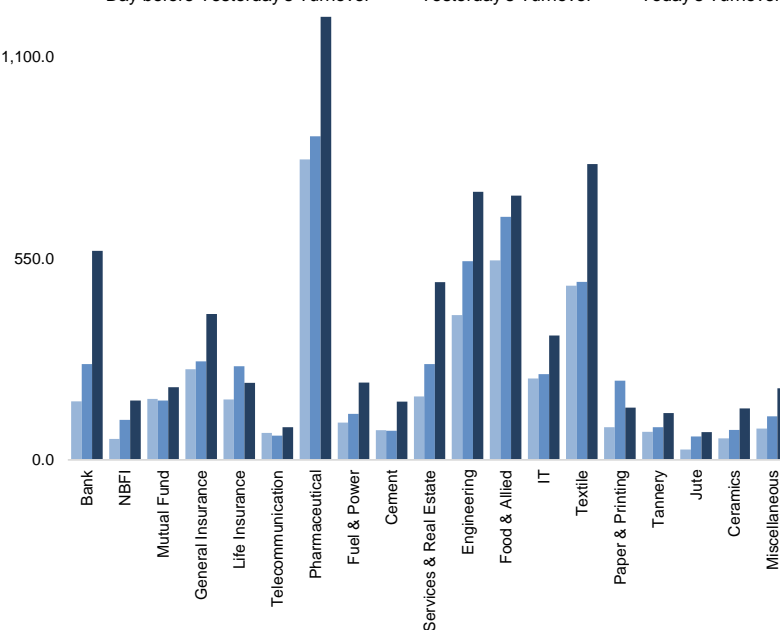
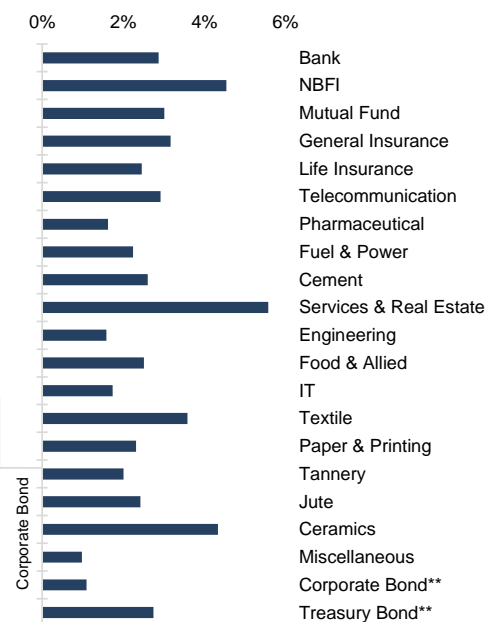


Figure: Sectorial Mcap Change



Market PE 14.8x

Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and 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	1,326	1,289	+37.03	+2.87%	36	634,088	9.4%	571.1	8.2%	7.3x	0.6x	GP	331,634	8.8%	24.9	8.6x	4.1x
NBFI	1,211	1,159	+52.70	+4.55%	23	117,255	1.7%	162.3	2.3%	NM	NM	WALTONHIL	199,357	5.3%	32.3	15.4x	1.8x
Mutual Fund	684	664	+20.02	+3.01%	37	31,969	0.5%	198.7	2.8%	NM	0.6x	SQURPHARMA	187,750	5.0%	53.5	9.3x	1.5x
General Insurance	3,211	3,112	+98.66	+3.17%	43	93,005	1.4%	398.5	5.7%	16.8x	1.4x	BATBC	178,362	4.8%	120.4	10.2x	3.4x
Life Insurance	2,099	2,049	+50.43	+2.46%	15	55,807	0.8%	210.4	3.0%	NM	NM	ROBI	126,758	3.4%	50.3	33.2x	1.9x
Telecommunication	4,133	4,016	+117.30	+2.92%	3	478,576	7.1%	89.3	1.3%	10.8x	2.9x	BEXIMCO	103,842	2.8%	0.6	NM	1.2x
Pharmaceutical	3,231	3,179	+51.68	+1.63%	33	616,797	9.2%	1,209.9	17.3%	16.7x	1.8x	RENATA	87,123	2.3%	26.9	38.0x	2.7x
Fuel & Power	1,268	1,240	+27.79	+2.24%	23	333,823	5.0%	211.4	3.0%	21.9x	0.7x	BERGERPBL	83,772	2.2%	8.8	25.8x	6.2x
Cement	2,401	2,340	+61.03	+2.61%	7	114,649	1.7%	158.9	2.3%	16.6x	2.3x	UPGDCL	81,331	2.2%	7.9	10.9x	2.4x
Services & Real Estate	1,608	1,523	+85.00	+5.58%	9	88,876	1.3%	485.0	6.9%	27.8x	0.6x	LHBL	73,747	2.0%	38.3	13.0x	3.1x
Engineering	3,194	3,144	+49.91	+1.59%	42	369,011	5.5%	732.0	10.5%	15.4x	1.2x	BRACBANK	64,418	1.7%	199.4	7.2x	0.9x
Food & Allied	16,488	16,084	+403.55	+2.51%	21	302,711	4.5%	722.0	10.3%	16.1x	5.1x	BXPHARMA	55,719	1.5%	44.7	10.5x	1.2x
IT	2,694	2,648	+46.09	+1.74%	11	35,438	0.5%	339.4	4.9%	29.2x	2.3x	UNILEVERCL	54,425	1.5%	90.6	63.1x	21.1x
Textile	1,274	1,230	+44.10	+3.58%	58	132,220	2.0%	807.7	11.6%	NM	0.9x	ICB	54,290	1.4%	7.6	NM	1.3x
Paper & Printing	7,283	7,118	+165.06	+2.32%	6	33,412	0.5%	142.8	2.0%	46.9x	1.4x	ISLAMIBANK	52,486	1.4%	0.0	8.3x	0.7x
Tannery	2,486	2,437	+48.93	+2.01%	6	27,223	0.4%	128.1	1.8%	39.2x	2.6x	DUTCHBANGL	41,656	1.1%	12.5	5.2x	0.8x
Jute	16,693	16,297	+395.70	+2.43%	3	3,912	0.1%	75.5	1.1%	NM	NM	BEACONPHAR	36,914	1.0%	25.4	81.9x	6.0x
Ceramics	533	511	+22.14	+4.34%	5	23,653	0.4%	140.4	2.0%	46.2x	1.4x	POWERGRID	36,826	1.0%	4.7	NM	0.2x
Miscellaneous	4,274	4,233	+41.65	+0.98%	15	232,890	3.5%	195.6	2.8%	39.3x	1.8x	EBL	35,719	1.0%	4.7	5.5x	0.8x
Corporate Bond**	6,379	6,310	+69.26	+1.10%	16	42,178	0.6%	0.0	0.0%	NM	NM	BESTHLDNG	33,684	0.9%	109.4	24.5x	0.5x
Treasury Bond**	192	187	+5.13	+2.75%	240	2,942,714	43.9%	1.7	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
SALAMCRST	23.1	+10.0%	7.3	NM	1.3x	SQURPHARMA	117,112	8.6%	9.3x	1.5x	ORIONPHARM	73.9	+3.5%	275.3	16.8x	0.8x
PHOENIXFIN	6.6	+10.0%	1.9	NM	NM	BEXIMCO	69,460	5.1%	NM	1.2x	BRACBANK	36.4	+4.9%	199.4	7.2x	0.9x
1STPRIMFMF	38.6	+10.0%	13.9	NM	3.6x	BATBC	45,948	3.4%	10.2x	3.4x	SEAPPEARL	93.0	+1.3%	172.1	31.2x	4.8x
AFTABAUTO	37.5	+10.0%	96.7	NM	0.8x	RENATA	35,002	2.6%	38.0x	2.7x	AIL	115.3	+0.3%	137.9	46.7x	4.8x
SILCOPHL	21.0	+9.9%	38.5	51.2x	0.9x	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	BATBC	330.3	+2.6%	120.4	10.2x	3.4x
KBPPWBIL	116.1	+9.9%	3.6	NM	9.8x	BXPHARMA	32,479	2.4%	10.5x	1.2x	SAIFPOWER	24.6	+6.5%	116.7	38.5x	1.6x
DESHBANDHU	28.8	+9.9%	35.3	48.8x	1x	BRACBANK	32,157	2.4%	7.2x	0.9x	ASIATICLAB	50.7	+2.6%	116.3	NM	1.0x
ZEALBANGLA	105.6	+9.9%	0.3	NM	NM	GP	30,004	2.2%	8.6x	4.1x	LOVELLO	91.7	+1.8%	113.2	66.4x	6.9x
RSRMSTEEL	15.7	+9.8%	3.6	NM	0.3x	LHBL	24,690	1.8%	13.0x	3.1x	BESTHLDNG	31.8	+9.3%	109.4	24.5x	0.5x
ESQUIRENIT	21.4	+9.7%	3.4	NM	0.3x	EBL	24,199	1.8%	5.5x	0.8x	MALEKSPIN	34.2	+2.4%	109.3	5.9x	0.7x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	PUBALIBANK	20,448	1.5%	4.1x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RUPALILIFE	187.3	-3.0%	59.5	NM	NM	NBL	16,930	1.2%	NM	1.3x	MTB	13.0	13.0	1.0	10,000	130.00
NEWLINE	46.9	-2.9%	0.0	90.2x	2x	CITYBANK	16,830	1.2%	3.9x	0.6x	NBL	6.0	6.0	2.0	15,500	93.00
CAPITECGBF	15.6	-2.5%	19.7	NM	1.6x	BSRMLTD	14,210	1.0%	4.6x	0.6x	JAMUNAOIL	190.0	190.0	1.0	451	85.60
BIFC	9.0	-2.2%	1.3	NM	NM	ALARABANK	13,534	1.0%	11.1x	1.1x	ACFL	16.8	16.6	4.0	3,355	55.70
PEOPLESINS	40.8	-2.2%	16.5	15.8x	1.2x	PRIMEBANK	12,985	1.0%	4.8x	0.7x	CAPITECGBF	16.8	15.6	17.0	3,259	50.90
HAKKANIPUL	57.7	-2.0%	5.6	35.6x	2.4x	OLYMPIC	12,616	0.9%	15.9x	2.6x	LOVELLO	89.5	87.4	6.0	469	41.51
WATACHEM	154.0	-1.5%	9.4	59.0x	2.5x	UTTARABANK	11,350	0.8%	10.8x	0.7x	RUPALILIFE	198.5	187.3	5.0	166	32.97
GHCL	37.0	-1.1%	17.6	NM	0.8x	ORIONPHARM	11,317	0.8%	16.8x	0.8x	SAMORITA	67.6	67.6	9.0	450	30.42
USMANIAGL	38.5	-1.0%	0.3	NM	0.5x	ROBI	10,738	0.8%	33.2x	1.9x	PRAGATILIF	138.7	129.4	6.0	208	27.88
AL-HAJTEX	145.4	-0.6%	13.3	NM	16.0x	* 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					RELANCE1	20.0	19.2	11.0	965	18.85

* 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	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MTB	13.0	13.0	130.0	10,000	1
NBL	6.0	6.0	93.0	15,500	2
JAMUNAOIL	190.0	190.0	85.6	451	1
ACFL	16.8	16.6	55.7	3,355	4
CAPITECGBF	16.8	15.6	50.9	3,259	17
LOVELLO	89.5	87.4	41.5	469	6
RUPALILIFE	198.5	187.3	33.0	166	5
SAMORITA	67.6	67.6	30.4	450	9
PRAGATILIF	138.7	129.4	27.9	208	6
RELIANCE1	20.0	19.2	18.9	965	11
CRYSTALINS	107.0	94.4	15.7	152	5
MEGHNACEM	80.0	78.5	11.0	138	8
BEXIMCO	115.0	104.1	7.8	71	14
PRIMEINSUR	36.8	36.8	7.4	200	1
FINEFOODS	169.8	169.8	7.1	42	1
BATBC	348.4	315.5	5.9	17	3
AIL	114.5	114.0	5.6	49	3
MIDLANDBNK	17.0	17.0	5.5	325	1
CENTRALINS	52.0	49.8	5.5	110	2
NRBCBANK	9.7	9.7	5.3	550	2
DHAKAINS	44.6	44.6	4.5	100	1
VFSTDL	13.2	13.2	4.4	335	2
Total			726.3		173

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
DELTALIFE		0.0%	30%	Record Date	8-Jul-24
BDFINANCE		0.0%	0%	Record Date	8-Jul-24
LINDEBD		0.0%	1540%	Record Date	9-Jul-24
DGIC		0.0%	5%	Record Date	15-Jul-24
MEGHNALIFE		0.0%	15%	Record Date	18-Jul-24
BGIC		0.0%	10%	Record Date	21-Jul-24
FIRSTFIN		0.0%	0%	Record Date	22-Jul-24
BAYLEASING		0.0%	0%	Record Date	22-Jul-24
SUNLIFEINS		0.0%	1%	Record Date	23-Jul-24
PRAGATILIF		0.0%	14%	Record Date	23-Jul-24
POPULARLIF		0.0%	37%	Record Date	25-Jul-24
SICL		0.0%	3%	Record Date	25-Jul-24
UNIONCAP		0.0%	0%	Record Date	28-Jul-24
ISLAMICFIN		0.0%	0%	Record Date	28-Jul-24
SANDHANINS		0.0%	12%	Record Date	29-Jul-24

Important DSE News

MARICO

The company has informed that Mr. Md. Shahinul Islam has been appointed as Company Secretary of the company with effect from July 01, 2024. His contact details are as follows: Marico Bangladesh Limited, Corporate Office: The Glass House, Floor-06, Plot-02, Block-SE(B), Guishan Avenue, Dhaka-1212, Email:shahinul.islam@marico.com, Cell: 01324438592.

YPL

Mr. Quazi Anwarul Haque, a Director of the company, has expressed his intention to transfer 2,723,108 shares of the company to Chaklader Rezaunul Alam, in demat form, outside the trading system of the Exchange, other than by way of gift.

Yeakin Agro Products Limited, a Corporate Director of the company, has expressed its intention to transfer 2,823,039 shares of the company to Mr. Chaklader Rezaunul Alam, in demat form, outside the trading system of the Exchange, other than by way of gift.

SK. Jamil Hossain, a Sponsor of the company, has expressed his intention to transfer 1,475,481 shares of the company to Mr. Didarul Alam, in demat form, outside the trading system of the Exchange, other than by way of gift.

Shatkira Feed Industries Ltd., a Corporate Sponsor of the company, has expressed its intention to transfer 52,46,356 shares of the company to Kapita Packaging Solutions Limited, in demat form, outside the trading system of the Exchange, other than by way of gift.

S.M. Akter Kabir, a Director of the company, has expressed his intention to transfer 1,748,785 shares of the company to Kapita Packaging Solutions Limited, in demat form, outside the trading system of the Exchange, other than by way of gift.

Kazi Emdadul Haque, a Sponsor of the company, has expressed his intention to transfer 274,809 shares of the company to Kapita Packaging Solutions Limited, in demat form, outside the trading system of the Exchange, other than by way of gift.

Ms. Maliha Parvin, a Sponsor of the company, has expressed her intention to transfer 1,573,906 shares of the company to Mohammad Harunor Rashid, in demat form, outside the trading system of the Exchange, other than by way of gift.

Ms. Julia Pervin, a Sponsor of the company, has expressed her intention to transfer 1,381,075 shares of the company to Mohammad Harunor Rashid, in demat form, outside the trading system of the Exchange, other than by way of gift.

Mrs. Subrina Samsad, a Sponsor of the company, has expressed her intention to transfer 3,385,771 shares of the company to Mohammad Harunor Rashid, in demat form, outside the trading system of the Exchange, other than by way of gift.

PENINSULA

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'The Peninsula Chittagong PLC' instead of 'The Peninsula Chittagong Limited' with effect from July 07, 2024. Other things (except name) will remain unchanged.

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