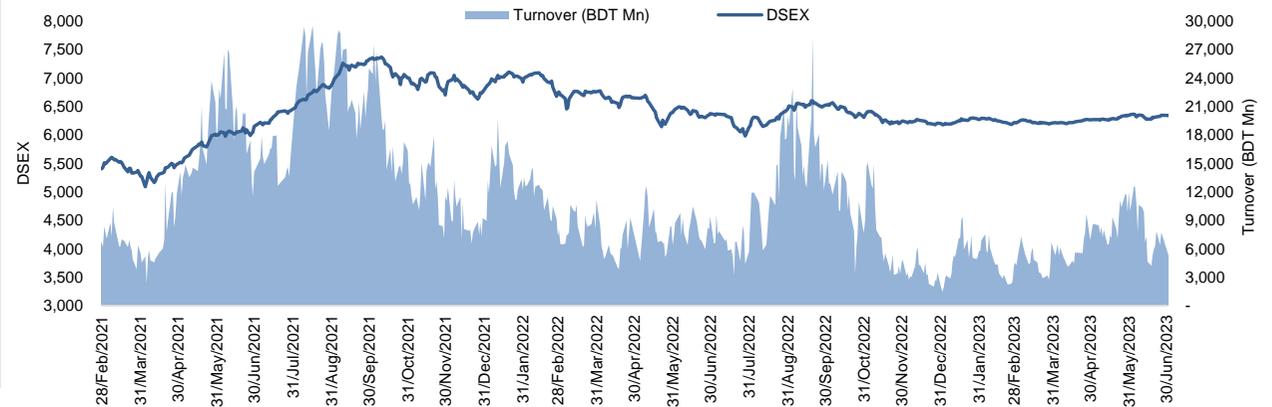


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.03%) gained 2.04 points and closed at 6,336.15. The blue-chip index DS30 (-0.03%), the Shariah-based index DSES (+0.01%), and the large-cap index CDSET (-0.02%) closed at 2,192.88, 1,374.56, and 1,211.91 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.20% followed by Engineering (+0.14%), Food & Allied (+0.08%). Pharmaceutical experienced the highest loss of 0.13% followed by Fuel & Power (-0.08%), NBF1 (-0.05%). Block trades contributed 12.2% of the overall market turnover. Fu Wang Food Ltd. (+9.8%) was the most traded share with a turnover of BDT 566 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,336.15	6,334.11	+2.04	+0.03%	+2.1%
DS30	2,192.88	2,193.53	-0.65	-0.03%	-0.1%
DSES	1,374.56	1,374.48	+0.08	+0.01%	+1.2%
CDSET	1,211.91	1,212.11	-0.20	-0.02%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	84	111	179	374
A Category (Equity)	32	72	135	239
B Category (Equity)	46	27	32	105
N Category (Equity)	1	3	1	5
Z Category (Equity)	5	9	11	25
Mutual Funds	1	0	27	28
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,715,328	7,714,808	+0.0%
	Mn USD	70,848	70,843	
Turnover	Mn BDT	8,907	6,003	+48.4%
	Mn USD	82	55	
Volume	Mn Shares	300	179	+67.8%
	No. of Trade	193,559	154,147	+25.6%

* Average Interbank Exchange Rate is BDT 108.90 as of Jul 04, 2023

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Figure: Sectorial Turnover (BDT Mn)

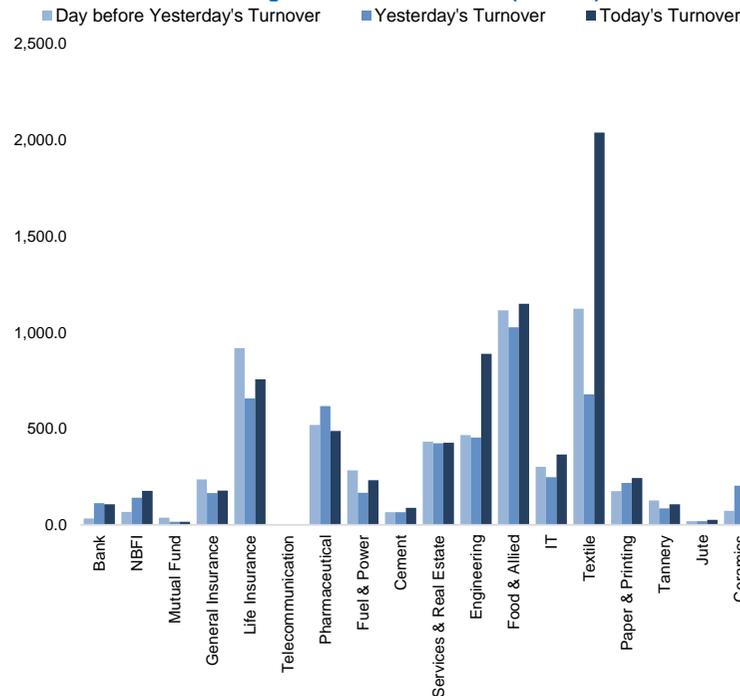
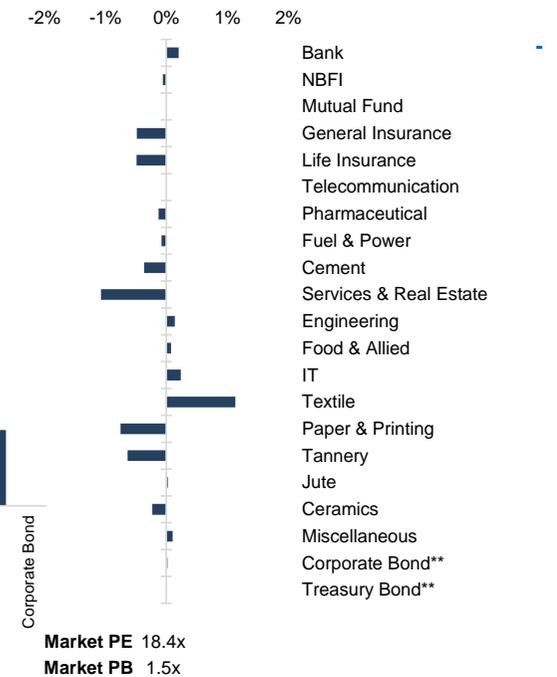


Figure: Sectorial Mcap Change



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	1,450	1,448	+2.92	+0.20%	35	683,734	9.1%	106.7	1.4%	11.9x	0.7x	GP	386,996	8.5%	0.7	13.0x	7.2x
NBFI	1,928	1,929	-1.04	-0.05%	23	187,646	2.5%	177.1	2.3%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	832	-	-	37	37,602	0.5%	15.8	0.2%	NM	0.7x	BATBC	280,098	6.1%	0.9	15.3x	6.9x
General Insurance	3,279	3,295	-15.89	-0.48%	42	95,707	1.3%	177.8	2.3%	17.5x	1.5x	SQURPHARMA	185,977	4.1%	2.8	9.9x	1.7x
Life Insurance	2,997	3,012	-14.72	-0.49%	15	83,763	1.1%	757.0	9.7%	NM	NM	ROBI	157,138	3.4%	0.3	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.0	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,707	3,712	-4.66	-0.13%	34	719,092	9.6%	488.7	6.2%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,702	1,703	-1.29	-0.08%	23	448,986	6.0%	232.4	3.0%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.2	12.0x	1.2x
Cement	2,532	2,542	-9.25	-0.36%	7	121,634	1.6%	89.0	1.1%	30.9x	2.6x	BERGERPBL	81,430	1.8%	1.2	27.0x	6.3x
Services & Real Esta	2,047	2,069	-22.17	-1.07%	8	80,885	1.1%	426.4	5.5%	27.5x	1.0x	LHBL	79,670	1.7%	62.0	14.7x	4.0x
Engineering	4,520	4,514	+6.27	+0.14%	42	530,519	7.0%	888.8	11.4%	72.6x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,654	21,637	+17.15	+0.08%	21	400,679	5.3%	1,149.5	14.7%	20.1x	8.2x	BXPHARMA	65,222	1.4%	0.1	14.6x	1.5x
IT	3,264	3,256	+7.71	+0.24%	11	42,550	0.6%	365.7	4.7%	29.8x	3.1x	BRACBANK	57,596	1.3%	0.3	9.0x	0.9x
Textile	1,665	1,646	+18.64	+1.13%	58	174,327	2.3%	2,039.0	26.1%	85.9x	1.2x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,858	10,940	-82.12	-0.75%	6	41,833	0.6%	243.0	3.1%	40.3x	2.1x	ISLAMIBANK	52,486	1.2%	0.4	8.9x	0.8x
Tannery	3,259	3,280	-20.79	-0.63%	6	34,421	0.5%	107.3	1.4%	49.6x	3.4x	DUTCHBANGL	44,203	1.0%	3.7	7.6x	1.0x
Jute	14,905	14,902	+3.54	+0.02%	3	3,646	0.0%	26.6	0.3%	NM	-1265.8x	TITASANGS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	696	697	-1.58	-0.23%	5	32,176	0.4%	135.1	1.7%	48.6x	1.9x	UNILEVERCL	40,197	0.9%	3.2	45.7x	13.3x
Miscellaneous	4,156	4,152	+4.33	+0.10%	14	226,277	3.0%	394.7	5.0%	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%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	+0.00	+0.00%	236	2,964,891	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
FUWANGFOOD	29.1	+9.8%	566.1	NM	7.3x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	FUWANGFOOD	29.1	+9.8%	566.1	NM	7.3x
RUPALIBANK	30.4	+9.7%	57.6	38.8x	0.8x	BATBC	74,086	4.3%	15.3x	6.9x	DSSL	18.3	+7.6%	296.4	29.7x	1.0x
DOMINAGE	18.2	+9.6%	128.1	46.7x	1.0x	BEXIMCO	69,196	4.0%	12.0x	1.2x	SEAPEARL	226.2	-2.5%	262.6	32.8x	13.1x
OAL	16.0	+9.6%	186.9	NM	1.3x	RENATA	68,042	4.0%	38.0x	4.6x	MAKSONSPIN	22.6	+1.3%	221.0	NM	1.2x
HFL	20.1	+8.1%	43.2	33.5x	0.5x	BXPHARMA	45,564	2.6%	14.6x	1.5x	KBPPWBIL	27.6	+6.6%	217.4	NM	2.3x
GENNEXT	6.9	+7.8%	107.5	NM	0.6x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	BBS	22.4	+3.7%	190.1	93.3x	1.3x
DSSL	18.3	+7.6%	296.4	29.7x	1x	GP	38,700	2.2%	13.0x	7.2x	OAL	16.0	+9.6%	186.9	NM	1.3x
KBPPWBIL	27.6	+6.6%	217.4	NM	2.3x	BRACBANK	30,976	1.8%	9.0x	0.9x	DELTALIFE	151.9	+3.8%	177.4	NM	NM
CNATEX	10.8	+5.9%	21.1	NM	0.7x	LHBL	26,980	1.6%	14.7x	4.0x	JHRML	81.8	-4.4%	169.6	35.4x	2.6x
IBP	18.3	+5.8%	73.5	NM	1.3x	EBL	24,998	1.5%	6.9x	0.9x	ALIF	14.1	+5.2%	168.2	27.4x	1.0x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PROGRESLIF	92.4	-8.0%	21.5	NM	NM	NBL	19,116	1.1%	NM	0.7x	ISLAMIBANK	32.6	32.6	3.0	18,505	603.26
LEGACYFOOT	103.5	-5.2%	75.2	NM	12x	PUBALIBANK	18,314	1.1%	4.7x	0.6x	RUPALILIFE	266.8	226.0	15.0	374	88.19
PRIMELIFE	75.3	-4.9%	67.7	NM	NM	CITYBANK	18,211	1.1%	5.5x	0.8x	EMERALDOIL	149.0	135.2	11.0	263	37.50
MEGHNAPET	42.5	-4.9%	4.2	NM	NM	SEAPEARL	16,847	1.0%	32.8x	13.1x	SIMTEX	25.8	25.5	8.0	1,457	37.33
SONALILIFE	87.5	-4.6%	53.2	NM	NM	ROBI	15,714	0.9%	85.7x	2.3x	IPDC	56.8	56.8	1.0	520	29.51
JHRML	81.8	-4.4%	169.6	35.4x	2.6x	ALARABANK	15,220	0.9%	14.9x	1.1x	SONALILIFE	97.1	96.0	2.0	171	16.58
MEGHNALIFE	94.1	-3.9%	117.6	NM	NM	PRIMEBANK	14,248	0.8%	5.7x	0.7x	RDFOOD	50.0	49.0	2.0	320	15.98
PAPERPROC	254.2	-3.7%	74.9	51.6x	7.5x	BSRMLTD	14,210	0.8%	NM	0.7x	SONALIPAPR	615.1	615.1	1.0	22	13.50
ORIONINFU	317.9	-3.7%	53.1	NM	23.1x	UPGDCL	13,547	0.8%	16.7x	4.4x	SQURPHARMA	209.6	207.9	17.0	63	13.11
CLICL	72.7	-3.6%	21.8	NM	NM						GP	274.0	261.6	14.0	44	11.51

* 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
ISLAMIBANK	32.6	32.6	603.3	18,505	3
RUPALILIFE	266.8	226.0	88.2	374	15
EMERALDOIL	149.0	135.2	37.5	263	11
SIMTEX	25.8	25.5	37.3	1,457	8
IPDC	56.8	56.8	29.5	520	1
SONALILIFE	97.1	96.0	16.6	171	2
RDFOOD	50.0	49.0	16.0	320	2
SONALIPAPR	615.1	615.1	13.5	22	1
SQURPHARMA	209.6	207.9	13.1	63	17
GP	274.0	261.6	11.5	44	14
LRBDL	33.5	32.3	10.8	328	18
AOL	40.0	32.9	10.0	299	8
SAIFPOWER	27.5	27.0	8.3	306	6
DOREENPWR	57.2	56.5	7.6	133	6
BXPHARMA	140.5	140.0	7.0	50	6
AL-HAJTEX	167.5	164.0	6.6	40	4
VFSTDL	20.3	20.0	6.0	297	7
EBL	29.2	29.2	5.8	200	2
SEAPEARL	228.0	228.0	5.7	25	1
ORIONPHARM	72.0	71.7	5.5	76	7
BATBC	510.0	479.8	4.9	10	8
GOLDENSON	16.7	16.4	4.8	293	5
Total			1,085.3		311

Important DSE News
LHBL

The company has informed that the Board of Directors has appointed Ms. Caludia Iris Albertini as the Director and as the member of the Audit Committee of the company with effect from June 22, 2023.

ASIAINS

The company has informed that the Board of Directors has appointed Mr. Syed Sajedul Karim, former Secretary of Government of Bangladesh and Mr. Mohammad Delwar Husain, former Member of NBR as Independent Directors of the company with effect from May 11, 2023.

PURABIGEN

Refer to their earlier news disseminated by DSE on 30.05.2023 regarding dividend declaration, the company has further informed that they have not received consent yet from BSEC against their declaration of 3% Stock dividend for the year ended December 31, 2022.

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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