

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.02%) lost 1.36 points and closed at 6,334.79. The blue-chip index DS30 (-0.06%), the Shariah-based index DSES (+0.05%), and the large-cap index CDSET (+0.02%) closed at 2,191.46, 1,375.26, and 1,212.18 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 0.19% followed by Pharmaceutical (-0.13%), Bank (-0.05%), Engineering (-0.04%), Fuel & Power (0.00%), Telecommunication (0.00%), and Food & Allied (+0.05%), respectively. Block trades contributed 18.0% of the overall market turnover. Fu Wang Food Ltd. (+10.0%) was the most traded share with a turnover of BDT 537 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,334.79	6,336.15	-1.36	-0.02%	+2.1%
DS30	2,191.46	2,192.88	-1.41	-0.06%	-0.2%
DSES	1,375.26	1,374.56	+0.69	+0.05%	+1.2%
CDSET	1,212.18	1,211.91	+0.27	+0.02%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	85	120	170	375
A Category (Equity)	54	53	135	242
B Category (Equity)	22	56	25	103
N Category (Equity)	3	1	1	5
Z Category (Equity)	6	10	9	25
Mutual Funds	2	0	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	7,713,311	7,715,328	-0.0%
	Mn USD	70,976	70,995	
Turnover	Mn BDT	8,993	8,907	+1.0%
	Mn USD	83	82	
Volume	Mn Shares	305	300	+1.6%
No. of Trade		186,289	193,559	-3.8%

* Average Interbank Exchange Rate is BDT 108.68 as of Jul 05, 2023

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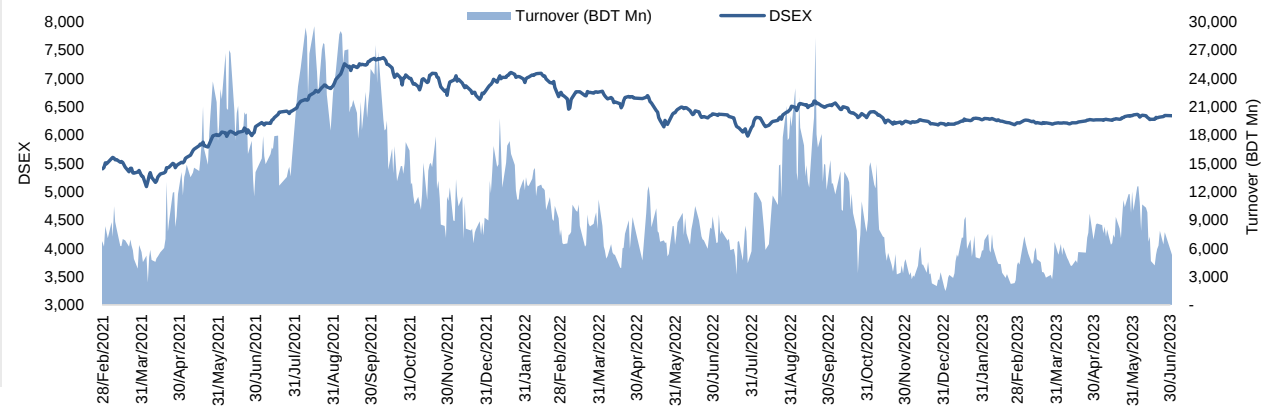


Figure: Sectorial Turnover (BDT Mn)

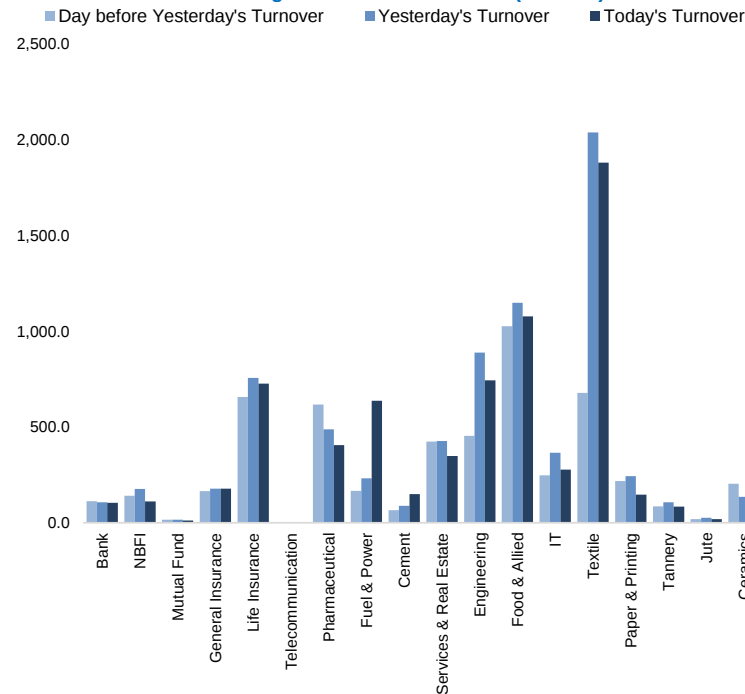
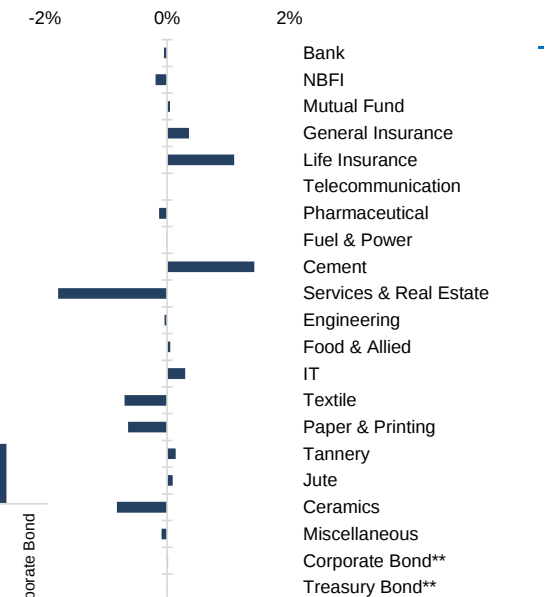


Figure: Sectorial Mcap Change



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	1,450	-0.74	-0.05%	35	683,386	9.1%	104.1	1.4%	11.9x	0.7x	GP	386,996	8.5%	0.7	13.0x	7.2x
NBFI	1,925	1,928	-3.64	-0.19%	23	187,293	2.5%	111.5	1.5%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	832	+0.38	+0.05%	37	37,619	0.5%	12.5	0.2%	NM	0.7x	BATBC	280,098	6.1%	0.8	15.3x	6.9x
General Insurance	3,291	3,279	+11.82	+0.36%	42	96,052	1.3%	178.0	2.4%	17.5x	1.5x	SQURPHARMA	185,977	4.1%	3.2	9.9x	1.7x
Life Insurance	3,030	2,997	+32.93	+1.10%	15	84,683	1.1%	726.5	9.8%	NM	NM	ROBI	157,138	3.4%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.8	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,702	3,707	-4.80	-0.13%	34	718,160	9.5%	405.9	5.5%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,702	1,702	-0.08	-0.00%	23	448,966	6.0%	637.8	8.6%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,569	2,532	+36.15	+1.43%	7	123,370	1.6%	149.2	2.0%	31.4x	2.7x	BERGERPBL	81,365	1.8%	0.2	27.0x	6.3x
Services & Real Esta	2,011	2,047	-36.46	-1.78%	8	79,444	1.1%	348.7	4.7%	27.0x	1.0x	LHBL	80,019	1.8%	51.2	14.8x	4.0x
Engineering	4,518	4,520	-1.98	-0.04%	42	530,286	7.0%	743.9	10.1%	72.5x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,665	21,654	+11.00	+0.05%	21	400,882	5.3%	1,078.3	14.6%	20.1x	8.2x	BXPHARMA	65,222	1.4%	0.2	14.6x	1.5x
IT	3,273	3,264	+9.73	+0.30%	11	42,677	0.6%	277.5	3.8%	29.9x	3.1x	BRACBANK	57,596	1.3%	0.3	9.0x	0.9x
Textile	1,653	1,665	-11.61	-0.70%	58	173,111	2.3%	1,881.8	25.5%	85.3x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,788	10,858	-69.27	-0.64%	6	41,566	0.6%	146.2	2.0%	40.1x	2.1x	ISLAMIBANK	52,486	1.2%	0.3	8.9x	0.8x
Tannery	3,264	3,259	+4.51	+0.14%	6	34,468	0.5%	84.4	1.1%	49.6x	3.4x	DUTCHBANGL	44,203	1.0%	5.2	7.6x	1.0x
Jute	14,919	14,905	+13.52	+0.09%	3	3,650	0.0%	19.5	0.3%	NM	-1266.9x	TITASGAS	40,459	0.9%	0.1	32.0x	0.6x
Ceramics	690	696	-5.71	-0.82%	5	31,912	0.4%	156.8	2.1%	48.2x	1.9x	UNILEVERCL	40,013	0.9%	0.9	45.5x	13.3x
Miscellaneous	4,152	4,156	-3.71	-0.09%	14	226,075	3.0%	313.2	4.2%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.1	NM	0.4x
Corporate Bond**	88	88	+0.01	+0.02%	10	36,591	0.5%	0.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	+0.00	+0.00%	236	2,964,928	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	32.0	+10.0%	537.3	NM	8.1x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	FUWANGFOOD	32.0	+10.0%	537.3	NM	8.1x
HEIDELBCEM	283.9	+8.7%	80.0	49.9x	4.2x	BATBC	74,086	4.3%	15.3x	6.9x	LRBDL	35.5	+1.1%	452.7	16.2x	0.9x
PROGRESLIF	99.1	+7.3%	18.0	NM	NM	BEXIMCO	69,196	4.0%	12.0x	1.2x	MALEKSPIN	28.1	+3.7%	431.6	NM	0.6x
GENNEXT	7.3	+5.8%	181.2	NM	0.6x	RENATA	68,042	4.0%	38.0x	4.6x	RUPALILIFE	244.0	+1.5%	260.0	NM	NM
EMERALDOIL	165.2	+4.9%	104.6	NM	NM	BXPHARMA	45,564	2.6%	14.6x	1.5x	OAL	16.5	+3.1%	190.3	NM	1.3x
AFTABAUTO	29.0	+4.7%	60.9	41.9x	0.6x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	GENNEXT	7.3	+5.8%	181.2	NM	0.6x
PRIMELIFE	78.5	+4.2%	47.5	NM	NM	GP	38,700	2.2%	13.0x	7.2x	KBPPWBIL	27.1	-1.8%	178.7	NM	2.3x
ARAMITCEM	27.1	+4.2%	9.5	NM	27.9x	BRACBANK	30,976	1.8%	9.0x	0.9x	SIMTEX	24.7	+0.4%	165.3	27.1x	1.1x
PARAMOUNT	45.3	+4.1%	5.1	25.9x	1.7x	LHBL	26,980	1.6%	14.8x	4.0x	SEAPEARL	219.5	-3.0%	136.6	31.8x	12.7x
NAVANACNG	27.7	+3.7%	23.0	NM	0.9x	EBL	24,998	1.5%	6.9x	0.9x	BBS	21.7	-3.1%	130.1	90.4x	1.2x
						OLYMPIC	19,683	1.1%	18.2x	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%	31.8x	12.7x						
						ROBI	15,714	0.9%	85.7x	2.3x						
						ALARABANK	15,220	0.9%	14.9x	1.1x						
						PRIMEBANK	14,248	0.8%	5.7x	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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade	Important DSE News
ALARABANK	23.9	23.9	1,022.9	42,800	3	
LHBL	69.0	69.0	89.7	1,300	2	
SIMTEX	27.0	26.3	56.5	2,124	6	
RUPALILIFE	239.0	220.0	54.4	232	11	
GP	273.0	261.6	52.2	195	34	
AOL	36.4	32.9	31.4	948	47	
EMERALDOIL	154.0	141.8	26.8	178	13	
LRBDL	34.6	32.7	21.0	627	34	
BXPHERMA	140.2	133.9	19.2	139	14	
BPML	86.5	86.5	16.9	195	1	
RENATA	1,222.4	1,222.4	15.5	13	1	
BATBC	479.8	479.8	12.9	27	8	
RDFOOD	53.1	49.9	12.3	245	4	
IFIC	12.3	10.1	10.4	865	4	
NBL	8.0	8.0	8.8	1,100	11	
AL-HAJTEX	174.0	165.0	8.0	48	6	
GPHISPAT	43.5	40.4	7.9	193	14	
SQURPHARMA	210.6	207.5	7.4	36	11	
KTL	21.4	21.4	6.9	324	11	
SEAPEARL	227.0	206.5	6.8	32	5	
SSSTEEL	16.3	15.0	6.7	433	12	
DOREENPWR	57.2	54.9	6.5	113	5	
Total			1,615.8		382	

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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