

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.10%) gained 5.69 points and closed at 5,564.63. The blue-chip index DS30 (-0.23%), the Shariah-based index DSES (+0.03%), and the large-cap index CDSET (-0.31%) closed at 1,959.90, 1,215.15, and 1,062.23 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 1.47% followed by Food & Allied (-1.25%), Telecommunication (-1.17%), NBFI (-0.94%), Fuel & Power (-0.80%), Bank (-0.03%), and Pharmaceutical (+0.18%), respectively. Block trades contributed 3.9% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (-2.7%) was the most traded share with a turnover of BDT 377 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,564.63	5,558.94	+5.69	+0.10%	-10.9%
DS30	1,959.90	1,964.49	-4.60	-0.23%	-6.4%
DSES	1,215.15	1,214.83	+0.31	+0.03%	-10.9%
CDSET	1,062.23	1,065.48	-3.25	-0.31%	-11.7%

	Advanced	Declined	Unchanged	Total
All Category	164	197	33	394
A Category (Equity)	87	127	20	234
B Category (Equity)	47	47	8	102
N Category (Equity)	3	1	0	4
Z Category (Equity)	27	22	5	54
Mutual Funds	5	22	10	37
Corporate Bonds	1	1	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,724,637	6,732,098	-0.1%
	Mn USD	57,048	57,111	
Turnover	Mn BDT	8,886	9,088	-2.2%
	Mn USD	75	77	
Volume	Mn Shares	310	315	-1.5%
	No. of Trade	246,485	244,225	+0.9%

* Average Interbank Exchange Rate is BDT 117.88 as of Jul 08, 2024

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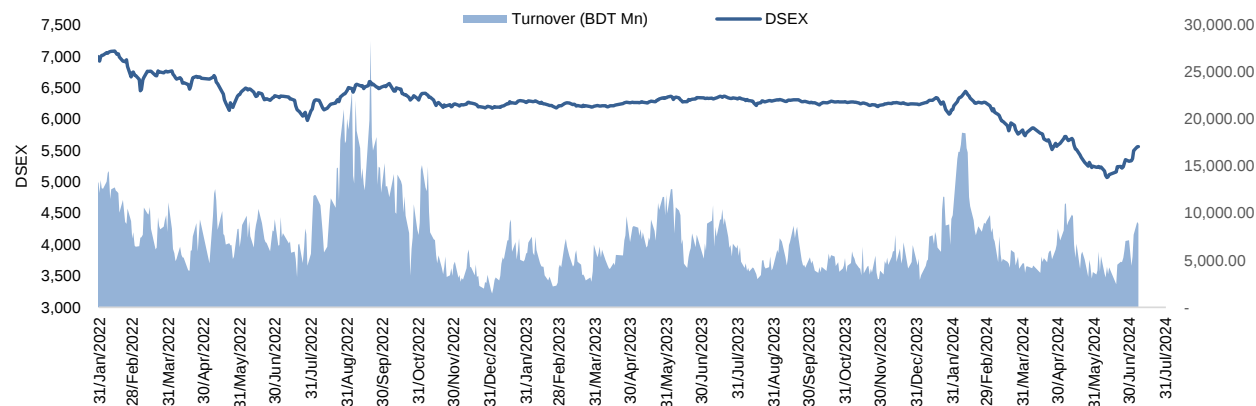


Figure: Sectorial Turnover (BDT Mn)

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

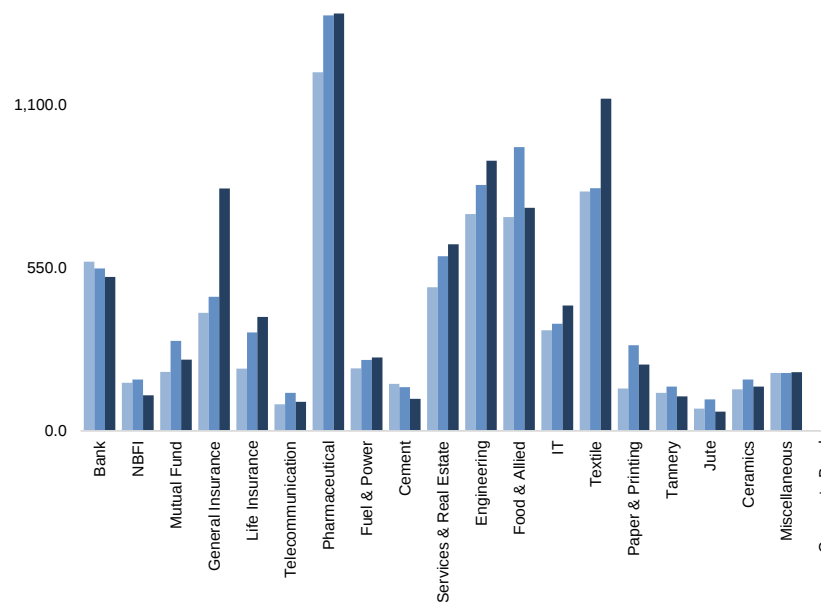
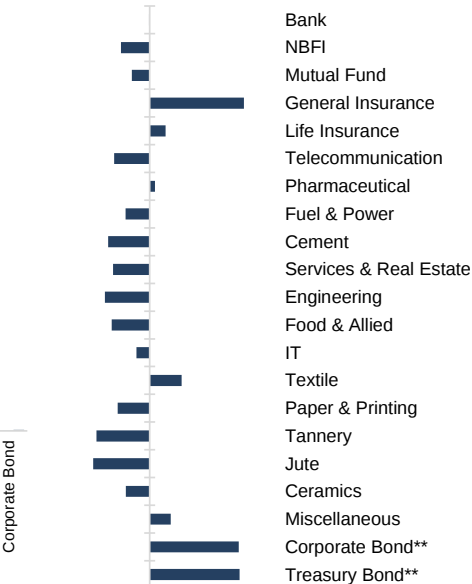


Figure: Sectorial Mcap Change

-4% -2% 0% 2% 4%



Market PE 14.9x

Market PB 1.3x

* 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	1,351	1,351	-0.35	-0.03%	36	646,414	9.6%	520.0	6.1%	7.5x	0.6x	GP	335,955	8.9%	45.4	8.7x	4.2x
NBFI	1,214	1,225	-11.55	-0.94%	23	117,490	1.7%	120.5	1.4%	NM	NM	SQURPHARMA	188,903	5.0%	70.9	9.3x	1.6x
Mutual Fund	710	714	-4.17	-0.58%	37	33,164	0.5%	240.4	2.8%	NM	0.6x	WALTONHIL	188,300	5.0%	30.1	14.5x	1.7x
General Insurance	3,386	3,284	+101.97	+3.11%	43	98,074	1.5%	818.4	9.6%	17.7x	1.5x	BATBC	186,192	4.9%	151.5	10.7x	3.6x
Life Insurance	2,187	2,176	+11.45	+0.53%	15	58,155	0.9%	384.2	4.5%	NM	NM	ROBI	127,282	3.4%	40.6	33.3x	1.9x
Telecommunication	4,172	4,221	-49.22	-1.17%	3	483,042	7.2%	97.8	1.1%	10.9x	3.0x	BEXIMCO	103,842	2.7%	0.1	NM	1.2x
Pharmaceutical	3,240	3,235	+5.70	+0.18%	33	618,650	9.2%	1,408.3	16.5%	16.7x	1.8x	RENATA	86,217	2.3%	13.9	37.6x	2.7x
Fuel & Power	1,276	1,287	-10.25	-0.80%	23	336,057	5.0%	247.7	2.9%	22.1x	0.7x	BERGERPBL	83,596	2.2%	2.4	25.7x	6.2x
Cement	2,386	2,419	-33.01	-1.36%	7	113,945	1.7%	108.6	1.3%	16.5x	2.3x	UPGDCL	80,230	2.1%	9.5	10.7x	2.4x
Services & Real Estate	1,587	1,606	-19.29	-1.20%	9	87,717	1.3%	629.9	7.4%	27.5x	0.6x	LHBL	73,050	1.9%	36.0	12.9x	3.1x
Engineering	3,115	3,162	-46.62	-1.47%	42	359,883	5.4%	911.6	10.7%	15.0x	1.1x	BRACBANK	64,771	1.7%	87.2	7.3x	0.9x
Food & Allied	16,803	17,017	-213.42	-1.25%	21	308,502	4.6%	752.8	8.8%	16.4x	5.2x	BXPHARMA	54,426	1.4%	19.3	10.2x	1.2x
IT	2,701	2,713	-11.91	-0.44%	11	35,529	0.5%	423.0	5.0%	29.3x	2.3x	ICB	53,336	1.4%	4.8	NM	1.3x
Textile	1,300	1,286	+13.56	+1.05%	58	134,856	2.0%	1,121.5	13.1%	NM	0.9x	ISLAMIBANK	52,486	1.4%	0.0	8.3x	0.7x
Paper & Printing	7,476	7,556	-79.79	-1.06%	6	34,299	0.5%	223.4	2.6%	48.2x	1.5x	UNILEVERCL	51,946	1.4%	4.3	60.2x	20.1x
Tannery	2,460	2,504	-43.85	-1.75%	6	26,942	0.4%	116.0	1.4%	38.8x	2.6x	DUTCHBANGL	43,589	1.2%	11.1	5.4x	0.9x
Jute	17,008	17,331	-322.40	-1.86%	3	3,986	0.1%	64.9	0.8%	NM	NM	POWERGRID	36,826	1.0%	5.0	NM	0.2x
Ceramics	539	543	-4.24	-0.78%	5	23,910	0.4%	149.5	1.8%	46.7x	1.4x	BEACONPHAR	36,544	1.0%	15.4	81.1x	6.0x
Miscellaneous	4,316	4,287	+29.63	+0.69%	15	235,189	3.5%	197.8	2.3%	39.7x	1.8x	EBL	36,398	1.0%	6.8	5.6x	0.8x
Corporate Bond**	6,649	6,459	+189.59	+2.94%	16	43,306	0.6%	3.7	0.0%	NM	NM	BESTHLDNG	33,048	0.9%	79.6	24.0x	0.5x
Treasury Bond**	201	195	+5.78	+2.96%	239	2,925,118	43.5%	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
KBPPWBIL	140.4	+9.9%	62.6	NM	11.9x	SQURPHARMA	117,112	8.6%	9.3x	1.6x	SEAPEARL	92.3	-2.7%	376.8	31.0x	4.8x
GOLDENSON	21.1	+9.9%	126.9	NM	1.1x	BEXIMCO	69,460	5.1%	NM	1.2x	FEKDIL	21.0	+5.0%	256.3	13.5x	1.1x
GHCL	41.1	+9.9%	40.2	NM	0.9x	BATBC	45,948	3.4%	10.7x	3.6x	ORIONPHARM	73.2	-1.7%	236.0	16.7x	0.8x
MIRACLEIND	33.7	+9.8%	22.3	NM	2.2x	RENATA	35,002	2.6%	37.6x	2.7x	ASIATICLAB	57.6	+5.9%	234.2	NM	1.1x
ACMEPL	18.1	+9.7%	80.6	NM	1.0x	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	BEACHHATCH	83.9	+2.9%	200.1	43.5x	6.7x
REPUBLIC	39.8	+9.3%	31.1	17.5x	2.1x	BXPHARMA	32,479	2.4%	10.2x	1.2x	AFTABAUTO	43.2	+8.5%	160.8	NM	0.9x
EASTERNINS	57.8	+9.3%	31.4	30.4x	1x	BRACBANK	32,157	2.4%	7.3x	0.9x	SALVOCHEM	46.0	-1.3%	153.8	22.5x	2.8x
UNIONINS	42.4	+8.7%	33.2	26.8x	2.3x	GP	30,004	2.2%	8.7x	4.2x	BATBC	344.8	-1.1%	151.5	10.7x	3.6x
KTL	15.1	+8.6%	46.1	79.5x	0.9x	LHBL	24,690	1.8%	12.9x	3.1x	RUPALILIFE	200.5	-1.1%	145.4	NM	NM
AFTABAUTO	43.2	+8.5%	160.8	NM	0.9x	EBL	24,199	1.8%	5.6x	0.8x	CENTRALINS	59.1	+3.5%	134.0	29.4x	1.2x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	PUBALIBANK					Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
UNILEVERCL	2,695.1	-3.0%	4.3	60.2x	20.1x	NBL	16,930	1.2%	NM	1.3x	PARAMOUNT	68.5	62.5	4.0	919	62.23
BDLAMPS	130.7	-3.0%	10.0	NM	2x	CITYBANK	16,830	1.2%	4.2x	0.7x	NBL	6.4	6.4	2.0	9,619	61.56
TAMIJTEX	127.0	-2.9%	3.4	19.1x	1.3x	BSRMLTD	14,210	1.0%	4.6x	0.6x	EIL	45.9	45.9	2.0	658	30.20
UNIONBANK	6.7	-2.9%	11.7	4.2x	0.4x	ALARABANK	13,534	1.0%	11.0x	1.1x	CRYSTALINS	107.2	100.0	6.0	258	26.51
DSHGARME	80.6	-2.9%	1.7	NM	4.4x	PRIMEBANK	12,985	1.0%	4.7x	0.7x	RELANCE1	20.3	19.8	6.0	795	15.80
GSPFINANCE	10.1	-2.9%	10.1	NM	0.4x	OLYMPIC	12,616	0.9%	16.0x	2.6x	MEGHNACEM	80.5	79.5	13.0	189	15.10
SEMLIBLSF	6.8	-2.9%	0.3	NM	0.8x	UTTARABANK	11,350	0.8%	11.6x	0.7x	CAPITECGBF	14.8	14.8	3.0	1,000	14.80
BAYLEASING	10.2	-2.9%	5.1	NM	1.8x	ORIONPHARM	11,317	0.8%	16.7x	0.8x	RUPALILIFE	202.0	200.0	3.0	65	13.03
GIB	6.8	-2.9%	63.5	4.7x	0.5x	ROBI	10,738	0.8%	33.3x	1.9x	CENTRALINS	61.0	56.0	2.0	145	8.62
FAMILYTEX	3.4	-2.9%	2.6	NM	0.3x						ADNTEL	105.0	105.0	4.0	80	8.40

* 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
PARAMOUNT	68.5	62.5	62.2	919	4
NBL	6.4	6.4	61.6	9,619	2
EIL	45.9	45.9	30.2	658	2
CRYSTALINS	107.2	100.0	26.5	258	6
RELIANCE1	20.3	19.8	15.8	795	6
MEGHNACEM	80.5	79.5	15.1	189	13
CAPITECGBF	14.8	14.8	14.8	1,000	3
RUPALILIFE	202.0	200.0	13.0	65	3
CENTRALINS	61.0	56.0	8.6	145	2
ADNTEL	105.0	105.0	8.4	80	4
SONALIPAPR	357.1	318.7	6.8	21	7
FINEFOODS	173.0	173.0	6.1	35	1
ICBSONALI1	11.5	11.1	6.1	550	2
METROSPIN	17.6	17.6	5.7	325	1
SAMORITA	77.0	74.9	5.7	74	2
NRBCBANK	10.3	10.3	4.1	400	1
BEACHHATCH	84.0	81.8	3.3	40	2
BEXIMCO	106.1	104.3	3.1	29	3
LOVELLO	101.6	91.4	2.6	28	2
EBL	26.1	26.1	2.6	100	1
GSPFINANCE	10.5	10.5	2.5	242	1
SAIFPOWER	25.0	25.0	2.5	100	1
Total			345.6		109

Important DSE News

SAMATALETH

(Q1 Un-audited): EPS was Tk. (0.02) for July-September 2023 as against Tk. (0.03) for July-September 2022. NOCFPS was Tk. (0.08) for July-September 2023 as against Tk. (0.05) for July-September 2022. NAV per share was Tk. 14.32 as on September 30, 2023 and Tk. 14.30 as on June 30, 2023.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BIFC		0.0%	0%	Record Date	12-Aug-24

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