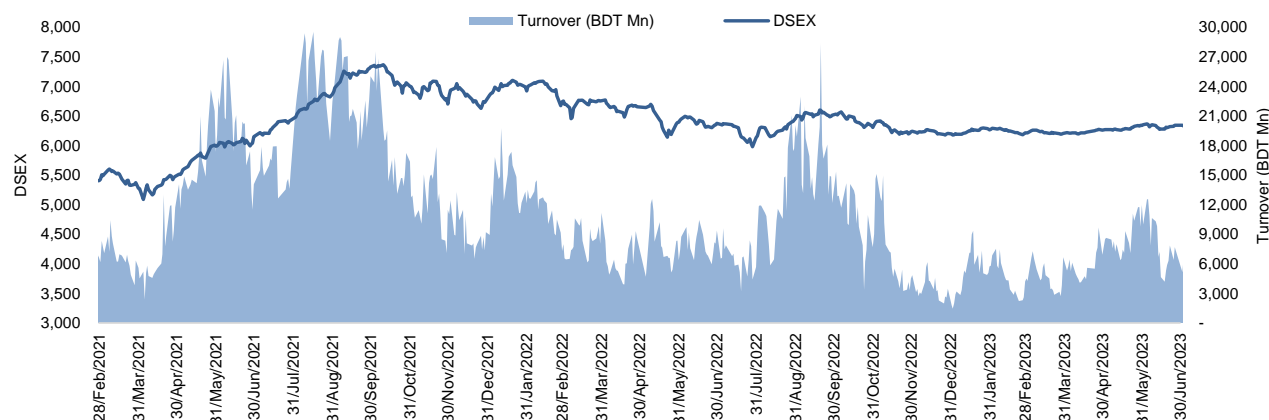


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.06%) gained 4.02 points and closed at 6,338.81. The blue-chip index DS30 (-0.12%), the Shariah-based index DSES (+0.19%), and the large-cap index CDSET (-0.10%) closed at 2,188.74, 1,377.87, and 1,210.97 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.37% followed by NBFI (+0.22%), Engineering (+0.19%), Fuel & Power (+0.18%), Bank (+0.01%), Telecommunication (0.00%), and Pharmaceutical (-0.04%), respectively. Block trades contributed 13.9% of the overall market turnover. Lubrref (Bangladesh) Limited (+7.3%) was the most traded share with a turnover of BDT 539 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,338.81	6,334.79	+4.02	+0.06%	+2.1%
DS30	2,188.74	2,191.46	-2.73	-0.12%	-0.3%
DSES	1,377.87	1,375.26	+2.62	+0.19%	+1.4%
CDSET	1,210.97	1,212.18	-1.21	-0.10%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	95	105	176	376
A Category (Equity)	36	75	132	243
B Category (Equity)	50	19	35	104
N Category (Equity)	1	3	1	5
Z Category (Equity)	8	8	8	24
Mutual Funds	4	0	25	29
Corporate Bonds	0	1	2	3
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,668,437	7,713,311	-0.6%
	Mn USD	70,514	70,927	
Turnover	Mn BDT	9,214	8,993	+2.5%
	Mn USD	85	83	
Volume	Mn Shares	296	305	-3.0%
No. of Trade		189,028	186,289	+1.5%

* Average Interbank Exchange Rate is BDT 108.75 as of Jul 06, 2023

Figure: Sectorial Turnover (BDT Mn)

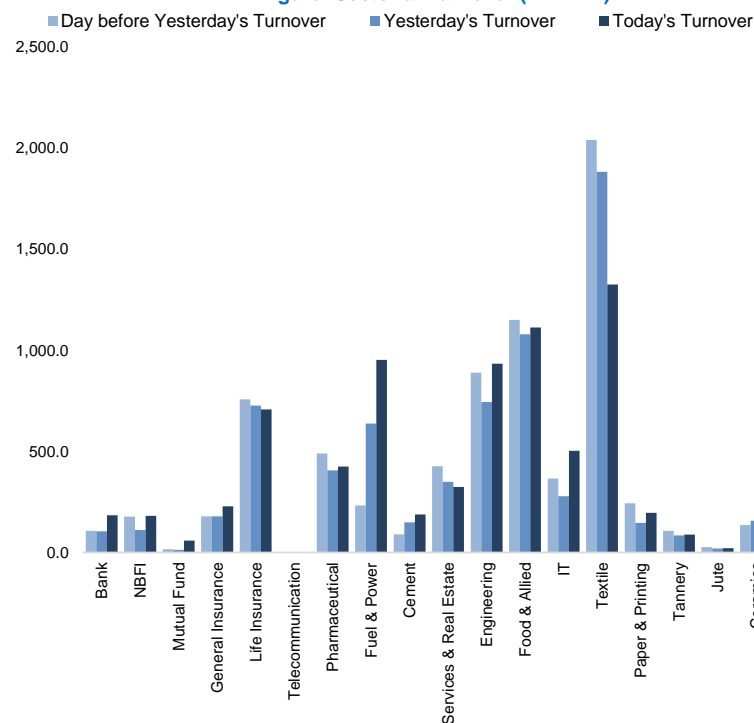
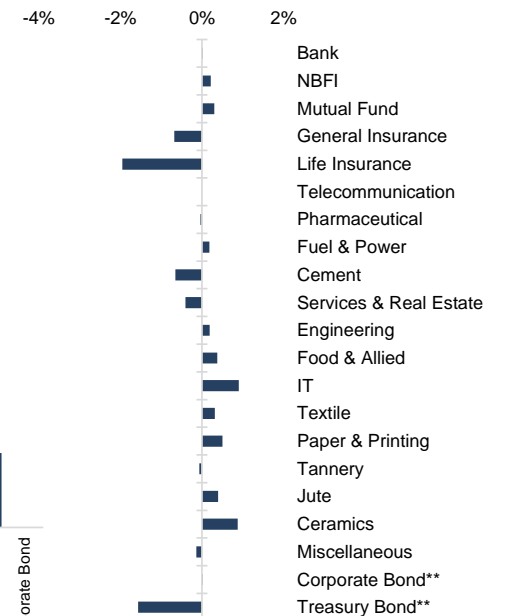


Figure: Sectorial Mcap Change



Market PE 18.4x

Market PB 1.5x

* Market P/E calculation excludes NBL

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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	+0.21	+0.01%	35	683,486	9.1%	184.1	2.3%	11.9x	0.7x	GP	386,996	8.5%	0.5	13.0x	7.2x
NBFI	1,929	1,925	+4.19	+0.22%	23	187,700	2.5%	181.3	2.3%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	834	832	+2.54	+0.31%	37	37,734	0.5%	58.4	0.7%	NM	0.7x	BATBC	280,098	6.1%	0.9	15.3x	6.9x
General Insurance	3,269	3,291	-22.26	-0.68%	42	95,402	1.3%	228.4	2.9%	17.4x	1.5x	SQURPHARMA	185,977	4.1%	2.6	9.9x	1.7x
Life Insurance	2,970	3,030	-59.24	-1.96%	15	83,028	1.1%	708.0	8.9%	NM	NM	ROBI	157,138	3.4%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	0.6	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.3	38.0x	4.6x
Pharmaceutical	3,701	3,702	-1.38	-0.04%	34	717,892	9.6%	424.7	5.4%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,705	1,702	+3.07	+0.18%	23	449,775	6.0%	952.1	12.0%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.5	12.0x	1.2x
Cement	2,552	2,569	-16.65	-0.65%	7	122,570	1.6%	187.7	2.4%	31.2x	2.7x	BERGERPBL	81,166	1.8%	0.9	27.0x	6.3x
Services & Real Estate	2,003	2,011	-8.17	-0.41%	8	79,122	1.1%	323.8	4.1%	26.9x	1.0x	LHBL	79,438	1.7%	132.8	14.7x	4.0x
Engineering	4,527	4,518	+8.46	+0.19%	42	531,280	7.1%	933.1	11.8%	72.7x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,746	21,665	+81.00	+0.37%	21	402,381	5.4%	1,112.3	14.0%	20.2x	8.2x	BXPHARMA	65,222	1.4%	0.2	14.6x	1.5x
IT	3,303	3,273	+29.56	+0.90%	11	43,062	0.6%	503.2	6.4%	30.1x	3.1x	BRACBANK	57,596	1.3%	0.0	9.0x	0.9x
Textile	1,658	1,653	+5.26	+0.32%	58	173,662	2.3%	1,324.8	16.7%	85.6x	1.1x	BEACONPHAR	56,595	1.2%	0.1	80.9x	9.2x
Paper & Printing	10,842	10,788	+54.08	+0.50%	6	41,775	0.6%	196.0	2.5%	40.3x	2.1x	ISLAMIBANK	52,486	1.2%	0.2	8.9x	0.8x
Tannery	3,261	3,264	-2.13	-0.07%	6	34,446	0.5%	88.4	1.1%	49.6x	3.4x	DUTCHBANGL	44,203	1.0%	3.2	7.6x	1.0x
Jute	14,978	14,919	+58.89	+0.39%	3	3,664	0.0%	20.5	0.3%	NM	-1271.9x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	696	690	+6.06	+0.88%	5	32,192	0.4%	125.0	1.6%	48.6x	1.9x	UNILEVERCL	39,805	0.9%	2.0	45.2x	13.2x
Miscellaneous	4,147	4,152	-5.58	-0.13%	14	225,771	3.0%	367.8	4.6%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.5	NM	0.4x
Corporate Bond**	88	88	+0.01	+0.02%	10	36,591	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	91	93	-1.45	-1.57%	236	2,918,432	39.0%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOD	35.2	+10.0%	329.7	NM	8.9x
SONARGAON	40.7	+10.0%	50.2	NM	3.5x
DACCADYE	17.8	+9.9%	58.9	NM	0.5x
KPPL	13.4	+9.8%	36.1	NM	NM
FUWANGCER	20.2	+9.8%	91.6	77.7x	1.7x
YPL	27.1	+9.7%	149.0	NM	5.1x
SHYAMPSUG	119.7	+9.6%	8.2	NM	NM
GENNEXT	8.0	+9.6%	253.4	NM	0.7x
CAPMIBLMF	15.2	+9.4%	23.6	NM	1.7x
MIDLANDBNK	14.3	+9.2%	101.6	14.8x	1.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
RUPALILIFE	231.5	-5.1%	205.0	NM	NM
TILIL	67.2	-4.4%	61.0	NM	NM
ISLAMIINS	54.2	-4.1%	22.2	18.2x	2.7x
MEGHNAPET	40.2	-4.1%	2.5	NM	NM
PRAGATILIF	119.1	-3.8%	19.1	NM	NM
SONALILIFE	87.0	-3.7%	49.8	NM	NM
NITOLINS	36.3	-3.5%	2.1	18.4x	1.2x
MEGHNALIFE	92.8	-3.3%	103.8	NM	NM
PARAMOUNT	43.9	-3.1%	10.2	25.1x	1.6x
LEGACYFOOT	100.6	-3.1%	43.7	NM	11.3x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.1%	9.9x	1.7x
BATBC	74,086	4.3%	15.3x	6.9x
BEXIMCO	69,196	4.0%	12.0x	1.2x
RENATA	68,042	4.0%	38.0x	4.6x
BXPHARMA	45,564	2.6%	14.6x	1.5x
BEACONPHAR	39,617	2.3%	80.9x	9.2x
GP	38,700	2.2%	13.0x	7.2x
BRACBANK	30,976	1.8%	9.0x	0.9x
LHBL	26,980	1.6%	14.7x	4.0x
EBL	24,998	1.5%	6.9x	0.9x
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%	31.6x	12.6x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	15,220	0.9%	15.0x	1.1x
PRIMEBANK	14,248	0.8%	5.6x	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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LRBDL	38.1	+7.3%	539.2	17.4x	1.0x
FUWANGFOOD	35.2	+10.0%	329.7	NM	8.9x
GENNEXT	8.0	+9.6%	253.4	NM	0.7x
KBPPWBIL	27.4	+1.1%	244.4	NM	2.3x
INTRACO	48.8	+5.9%	232.9	32.4x	3.8x
ADNTEL	140.9	+1.7%	225.8	36.6x	5.1x
RUPALILIFE	231.5	-5.1%	205.0	NM	NM
OAL	17.4	+5.5%	188.3	NM	1.4x
BBS	22.9	+5.5%	165.1	95.4x	1.3x
ALIF	13.9	+2.2%	149.7	27.0x	0.9x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ISLAMIBANK	32.6	32.6	2.0	26,000	847.60
RUPALILIFE	240.0	222.7	11.0	197	45.76
EMERALDOIL	162.0	148.9	17.0	267	42.01
RDFOOD	55.0	46.2	8.0	860	41.67
AOL	36.5	32.9	62.0	1,137	39.82
BXPHARMA	140.6	132.5	20.0	266	37.20
BEACONPHAR	266.2	266.2	1.0	82	21.83
DOREENPWR	61.5	57.0	5.0	192	11.65
NBL	8.0	8.0	14.0	1,438	11.50
AL-HAJTEX	181.4	175.0	9.0	58	10.39

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ISLAMIBANK	32.6	32.6	847.6	26,000	2
RUPALILIFE	240.0	222.7	45.8	197	11
EMERALDOIL	162.0	148.9	42.0	267	17
RDFOOD	55.0	46.2	41.7	860	8
AOL	36.5	32.9	39.8	1,137	62
BXPHERMA	140.6	132.5	37.2	266	20
BEACONPHAR	266.2	266.2	21.8	82	1
DOREENPWR	61.5	57.0	11.7	192	5
NBL	8.0	8.0	11.5	1,438	14
AL-HAJTEX	181.4	175.0	10.4	58	9
SEAPEARL	226.3	219.0	9.5	43	6
FUWANGFOOD	34.0	32.3	8.9	268	9
SQURPHARMA	209.3	207.0	8.0	38	13
SIMTEX	26.2	26.2	7.9	300	2
PRAGATILIF	134.0	133.0	7.3	55	4
INTRACO	47.0	46.9	6.5	138	2
JHRML	89.5	82.8	6.0	71	3
UNIONINS	59.6	59.6	6.0	100	1
ANWARGALV	194.7	194.7	5.8	30	3
SPCERAMICS	38.7	38.7	5.2	135	9
MEGHNALIFE	98.0	94.1	5.0	53	3
ICB	95.0	95.0	4.7	50	1
Total			1,279.4		320

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

Important DSE News

RINGSHINE

Referring to their earlier news disseminated by DSE on 29.10.2020 regarding dividend declaration, the Board of Directors recommended 1% Cash and 1% Stock dividend for the year ended on June 30, 2020. However, the company vide its minutes of the 23rd AGM held on June 20, 2023, has informed that owing to the deviation ascertained upon the re-valuation of assets and liabilities, a restatement of assets and liabilities for the year 2019-2020 was made in the following year's 2020-2021 audited financial statements, which reflects an incurring loss by the company instead. The Board of Directors has, thus, decided no Cash and Stock dividend shall be recommended. As such, this has been resolved that the 1% Cash and 1% Stock dividend declared previously for the year 2019-2020 has not been approved in AGM and shall be revoked. There shall be no Cash and Stock dividend recommended for the year 2019-2020.

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