

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.54%) gained 30.02 points and closed at 5,594.65. The blue-chip index DS30 (+0.24%), the Shariah-based index DSES (+0.67%), and the large-cap index CDSET (0.00%) closed at 1,964.53, 1,223.32, and 1,062.20 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.77%, followed by Engineering (+0.74%), Pharmaceutical (+0.31%), Bank (-0.14%), Telecommunication (-0.41%), NBFI (-0.44%), and Food & Allied (-0.75%), respectively. Block trades contributed 5.3% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (-2.7%) was the most traded share with a turnover of BDT 536 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,594.65	5,564.63	+30.02	+0.54%	-10.4%
DS30	1,964.53	1,959.90	+4.64	+0.24%	-6.2%
DSES	1,223.32	1,215.15	+8.18	+0.67%	-10.3%
CDSET	1,062.20	1,062.23	-0.03	-0.00%	-11.7%

	Advanced	Declined	Unchanged	Total
All Category	237	111	45	393
A Category (Equity)	125	74	34	233
B Category (Equity)	85	17	0	102
N Category (Equity)	1	2	1	4
Z Category (Equity)	26	18	10	54
Mutual Funds	10	11	16	37
Corporate Bonds	0	2	0	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,738,631	6,724,637	+0.2%
Mn USD	57,107	56,988	
Turnover			
Mn BDT	10,191	8,886	+14.7%
Mn USD	86	75	
Volume			
Mn Shares	349	310	+12.6%
No. of Trade	252,259	246,485	+2.3%

\* Average Interbank Exchange Rate is BDT 118.00 as of Jul 09, 2024

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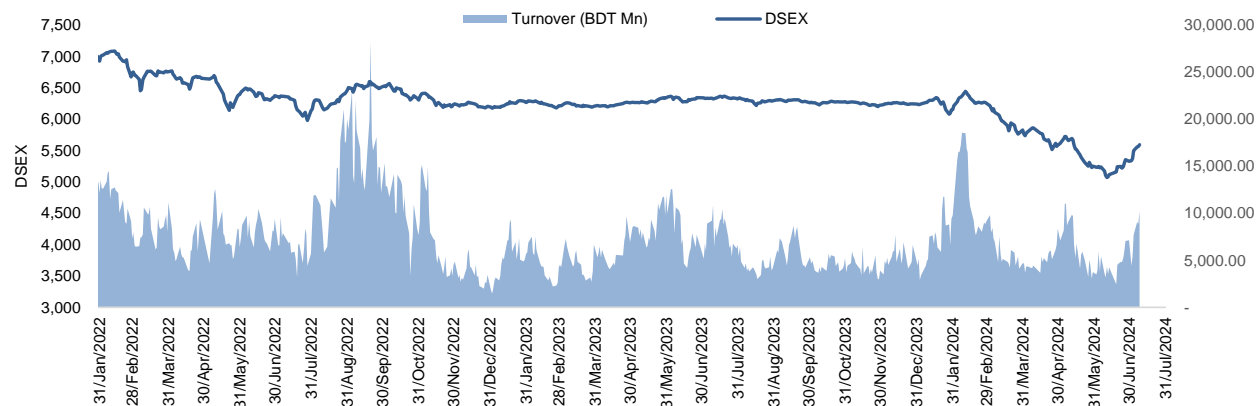


Figure: Sectorial Turnover (BDT Mn)

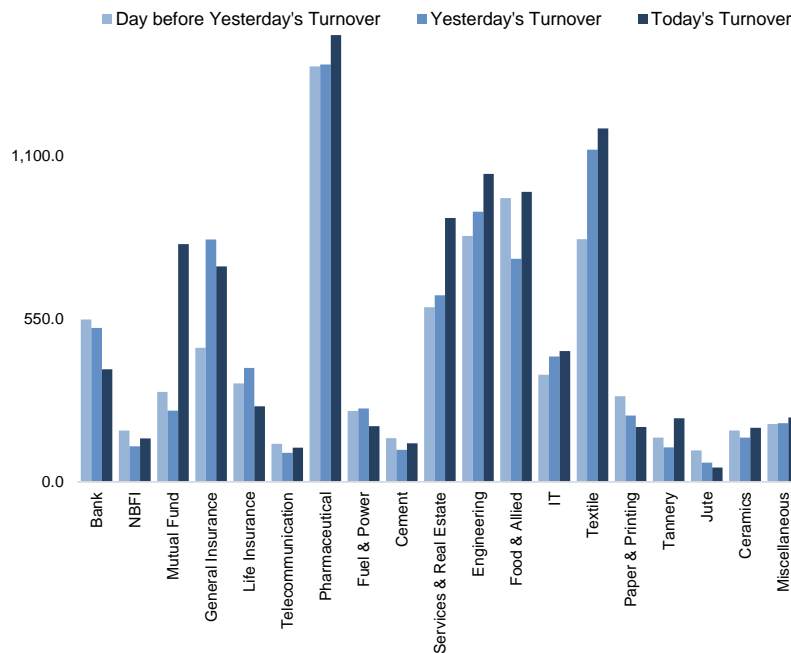
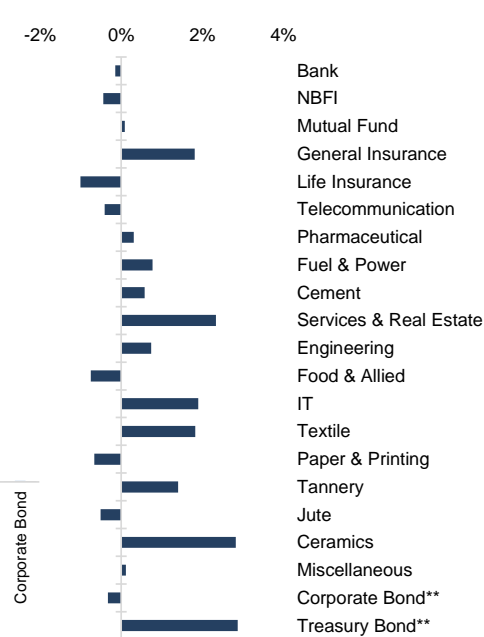


Figure: Sectorial Mcap Change



Market PE 15.0x

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	1,349	1,351	-1.93	-0.14%	36	645,489	9.6%	380.3	3.9%	7.4x	0.6x	GP	330,959	8.7%	57.2	8.6x	4.1x
NBFI	1,208	1,214	-5.40	-0.44%	23	116,968	1.7%	146.5	1.5%	NM	NM	SQURPHARMA	189,878	5.0%	86.2	9.4x	1.6x
Mutual Fund	711	710	+0.63	+0.09%	37	33,193	0.5%	802.3	8.3%	NM	0.6x	WALTONHIL	187,906	5.0%	15.3	14.5x	1.7x
General Insurance	3,447	3,386	+61.39	+1.81%	43	99,852	1.5%	726.8	7.5%	18.0x	1.5x	BATBC	183,762	4.8%	106.1	10.5x	3.5x
Life Insurance	2,165	2,187	-22.05	-1.01%	15	57,569	0.9%	255.5	2.6%	NM	NM	ROBI	130,425	3.4%	47.3	34.1x	1.9x
Telecommunication	4,155	4,172	-17.15	-0.41%	3	481,056	7.1%	115.9	1.2%	10.8x	2.9x	BEXIMCO	103,842	2.7%	0.1	NM	1.2x
Pharmaceutical	3,250	3,240	+10.14	+0.31%	33	620,586	9.2%	1,507.6	15.6%	16.8x	1.8x	RENATA	85,988	2.3%	24.2	37.5x	2.6x
Fuel & Power	1,286	1,276	+9.89	+0.77%	23	338,661	5.0%	188.4	2.0%	22.2x	0.7x	BERGERPBL	83,550	2.2%	1.6	25.7x	6.2x
Cement	2,400	2,386	+13.78	+0.58%	7	114,604	1.7%	129.8	1.3%	16.6x	2.3x	UPGDCL	81,041	2.1%	6.6	10.8x	2.4x
Services & Real Estate	1,624	1,587	+37.13	+2.34%	9	89,770	1.3%	890.3	9.2%	28.1x	0.6x	LHBL	73,399	1.9%	17.6	13.0x	3.1x
Engineering	3,138	3,115	+23.15	+0.74%	42	362,557	5.4%	1,039.6	10.8%	15.2x	1.1x	BRACBANK	64,771	1.7%	40.5	7.3x	0.9x
Food & Allied	16,677	16,803	-125.70	-0.75%	21	306,194	4.5%	979.0	10.1%	16.3x	5.1x	BXPHARMA	54,738	1.4%	18.5	10.3x	1.2x
IT	2,752	2,701	+51.35	+1.90%	11	36,205	0.5%	441.2	4.6%	29.9x	2.3x	ICB	52,643	1.4%	7.2	NM	1.2x
Textile	1,324	1,300	+23.77	+1.83%	58	137,322	2.0%	1,193.2	12.4%	NM	0.9x	ISLAMIBANK	52,486	1.4%	0.0	8.3x	0.7x
Paper & Printing	7,427	7,476	-49.40	-0.66%	6	34,073	0.5%	185.0	1.9%	47.9x	1.5x	UNILEVERCL	50,481	1.3%	6.6	58.5x	19.6x
Tannery	2,494	2,460	+34.49	+1.40%	6	27,320	0.4%	214.7	2.2%	39.3x	2.6x	DUTCHBANGL	42,974	1.1%	3.1	5.3x	0.9x
Jute	16,922	17,008	-86.38	-0.51%	3	3,965	0.1%	48.4	0.5%	NM	NM	POWERGRID	37,101	1.0%	2.7	NM	0.2x
Ceramics	554	539	+15.25	+2.83%	5	24,587	0.4%	182.7	1.9%	48.0x	1.5x	BEACONPHAR	36,175	1.0%	18.4	80.3x	5.9x
Miscellaneous	4,321	4,316	+5.15	+0.12%	15	235,470	3.5%	217.7	2.3%	39.7x	1.8x	EBL	35,991	0.9%	8.4	5.5x	0.8x
Corporate Bond**	6,627	6,649	-21.81	-0.33%	16	42,849	0.6%	1.6	0.0%	NM	NM	BESTHLDNG	34,531	0.9%	106.7	25.1x	0.6x
Treasury Bond**	207	201	+5.78	+2.87%	239	2,929,931	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
SALVOCHEM	50.6	+10.0%	234.0	24.8x	3.1x	SQURPHARMA	117,112	8.6%	9.4x	1.6x	SEAPEARL	89.8	-2.7%	535.9	30.1x	4.6x
KTL	16.6	+9.9%	66.4	87.4x	1.0x	BEXIMCO	69,460	5.1%	NM	1.2x	CAPITECGBF	14.5	-2.0%	454.7	NM	1.5x
BEACHHATCH	92.2	+9.9%	261.9	47.8x	7.4x	BATBC	45,948	3.4%	10.5x	3.5x	BEACHHATCH	92.2	+9.9%	261.9	47.8x	7.4x
HRTEX	50.3	+9.8%	34.8	NM	1.4x	RENATA	35,002	2.6%	37.5x	2.6x	SALVOCHEM	50.6	+10.0%	234.0	24.8x	3.1x
DESHBANDHU	32.6	+9.8%	55.7	55.3x	1.7x	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	LOVELLO	96.1	+6.2%	218.3	69.6x	7.3x
1STPRIMFMF	45.2	+9.7%	104.8	NM	4.3x	BXPHARMA	32,479	2.4%	10.3x	1.2x	ASIATICLAB	57.2	-0.7%	216.9	NM	1.1x
PENINSULA	20.0	+9.3%	12.9	NM	1x	BRACBANK	32,157	2.4%	7.3x	0.9x	ORIONPHARM	73.7	+0.7%	190.3	16.8x	0.8x
BBSCABLES	30.9	+9.2%	77.9	NM	1.0x	GP	30,004	2.2%	8.6x	4.1x	FEKDIL	20.9	-0.5%	184.0	13.4x	1.1x
REPUBLIC	43.1	+8.3%	71.8	18.9x	2.3x	LHBL	24,690	1.8%	13.0x	3.1x	AIL	118.0	+6.9%	161.9	47.8x	4.9x
EGEN	41.0	+7.9%	146.3	27.9x	1.8x	EBL	24,199	1.8%	5.5x	0.8x	CENTRALINS	62.3	+5.4%	149.0	31.0x	1.2x
						PUBALIBANK	20,448	1.5%	4.0x	0.6x						
						NBL	16,930	1.2%	NM	1.3x						
						CITYBANK	16,830	1.2%	4.3x	0.7x						
						BSRMLTD	14,210	1.0%	4.6x	0.6x						
						ALARABANK	13,534	1.0%	11.2x	1.1x						
						PRIMEBANK	12,985	1.0%	4.7x	0.7x						
						OLYMPIC	12,616	0.9%	15.9x	2.6x						
						UTTARABANK	11,350	0.8%	11.9x	0.7x						
						ORIONPHARM	11,317	0.8%	16.8x	0.8x						
						ROBI	10,738	0.8%	34.1x	1.9x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RUPALILIFE	194.5	-3.0%	68.1	NM	NM						BEACHHATCH	88.5	81.4	14.0	1,462	119.82
NATLIFEINS	108.6	-2.9%	1.4	NM	NM						NBL	6.5	6.5	2.0	14,500	94.25
PRIME1ICBA	6.6	-2.9%	6.5	NM	1.1x						LOVELLO	93.0	88.0	18.0	464	41.64
SHYAMPSUG	144.0	-2.9%	3.3	NM	NM						AIL	120.0	108.0	11.0	296	33.40
ZEALBANGLA	114.3	-2.9%	0.2	NM	NM						CENTRALINS	60.9	57.6	6.0	515	31.03
ICBIBANK	3.4	-2.9%	0.6	NM	NM						EIL	45.8	40.5	4.0	671	30.52
UNILEVERCL	2,619.1	-2.8%	6.6	58.5x	19.6x						PREMIERCEM	72.9	70.1	4.0	402	28.26
PHOENIXFIN	7.1	-2.7%	4.5	NM	NM						PEOPLESINS	41.0	39.3	11.0	597	23.66
SEAPEARL	89.8	-2.7%	535.9	30.1x	4.6x						DAFODILCOM	78.3	78.3	1.0	244	19.11
POPULAR1MF	3.6	-2.7%	2.2	NM	0.4x						PRIMEINSUR	42.6	42.6	1.0	300	12.78

\* 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
BEACHHATCH	88.5	81.4	119.8	1,462	14
NBL	6.5	6.5	94.3	14,500	2
LOVELLO	93.0	88.0	41.6	464	18
AIL	120.0	108.0	33.4	296	11
CENTRALINS	60.9	57.6	31.0	515	6
EIL	45.8	40.5	30.5	671	4
PREMIERCEM	72.9	70.1	28.3	402	4
PEOPLESINS	41.0	39.3	23.7	597	11
DAFODILCOM	78.3	78.3	19.1	244	1
PRIMEINSUR	42.6	42.6	12.8	300	1
SQURPHARMA	206.8	206.8	11.3	55	3
BEXIMCO	126.3	104.1	10.0	93	8
PRAGATILIF	150.1	132.5	8.1	58	5
TOSRIFA	24.5	24.2	7.6	311	5
RELIANCE1	20.3	20.3	7.1	352	2
CRYSTALINS	107.0	100.0	6.6	65	3
SALVOCHEM	50.0	46.0	6.1	132	2
RUPALILIFE	218.0	198.0	4.6	22	5
REPUBLIC	40.1	40.0	4.0	100	2
FEKDIL	23.0	23.0	3.9	170	2
AFCAGRO	13.9	13.9	3.9	281	1
RENATA	750.0	750.0	3.8	5	1
<b>Total</b>			<b>544.4</b>		<b>144</b>

**Important DSE News**
**EIL**

The company has informed that the Board of Directors has elected Mr. Mazakat Harun as Chairman of the company.

**NRBCBANK**

Mr. Mostafisur Prince Rahman, a sponsor of the Company, has expressed his intention to buy 7,00,000 shares of the Company at prevailing market price (in the Public/Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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