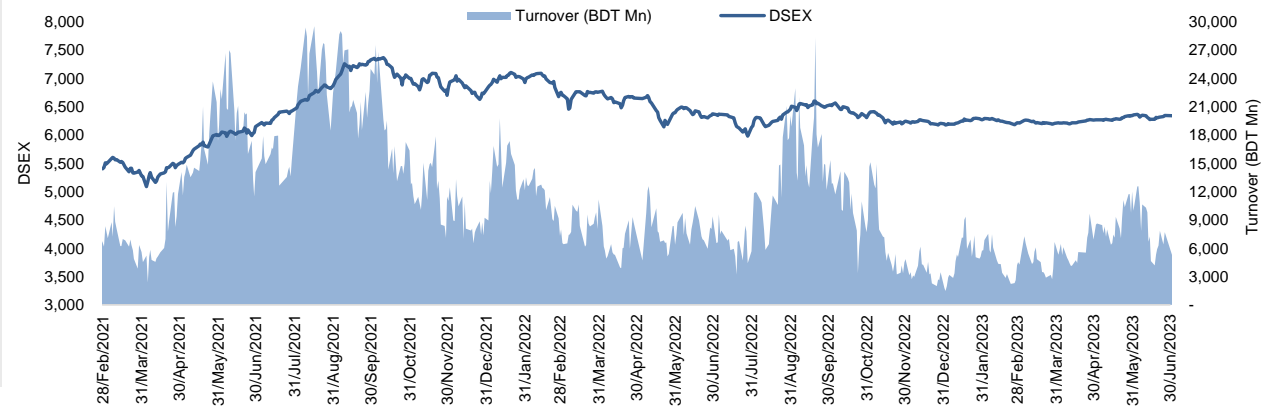


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.21%) lost 13.61 points and closed at 6,325.20. The blue-chip index DS30 (+0.09%), the Shariah-based index DSES (-0.26%), and the large-cap index CDSET (0.00%) closed at 2,190.78, 1,374.25, and 1,210.94 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.27% followed by Engineering (-0.25%), Bank (-0.20%), Fuel & Power (-0.11%), NBFI (-0.02%), Telecommunication (0.00%), and Pharmaceutical (+0.08%), respectively. Block trades contributed 10.1% of the overall market turnover. Fu Wang Food Ltd. (-3.1%) was the most traded share with a turnover of BDT 965 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,325.20	6,338.81	-13.61	-0.21%	+1.9%
DS30	2,190.78	2,188.74	+2.04	+0.09%	-0.2%
DSES	1,374.25	1,377.87	-3.62	-0.26%	+1.1%
CDSET	1,210.94	1,210.97	-0.03	-0.00%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	37	161	178	376
A Category (Equity)	18	87	136	241
B Category (Equity)	17	59	30	106
N Category (Equity)	0	4	1	5
Z Category (Equity)	2	11	11	24
Mutual Funds	1	4	25	30
Corporate Bonds	0	1	2	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,661,340	7,668,437	-0.1%
	Mn USD	70,288	70,353	
Turnover	Mn BDT	10,840	9,214	+17.6%
	Mn USD	99	85	
Volume	Mn Shares	346	296	+16.8%
No. of Trade		223,826	189,028	+18.4%

\* Average Interbank Exchange Rate is BDT 109.00 as of Jul 09, 2023

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Figure: Sectorial Turnover (BDT Mn)

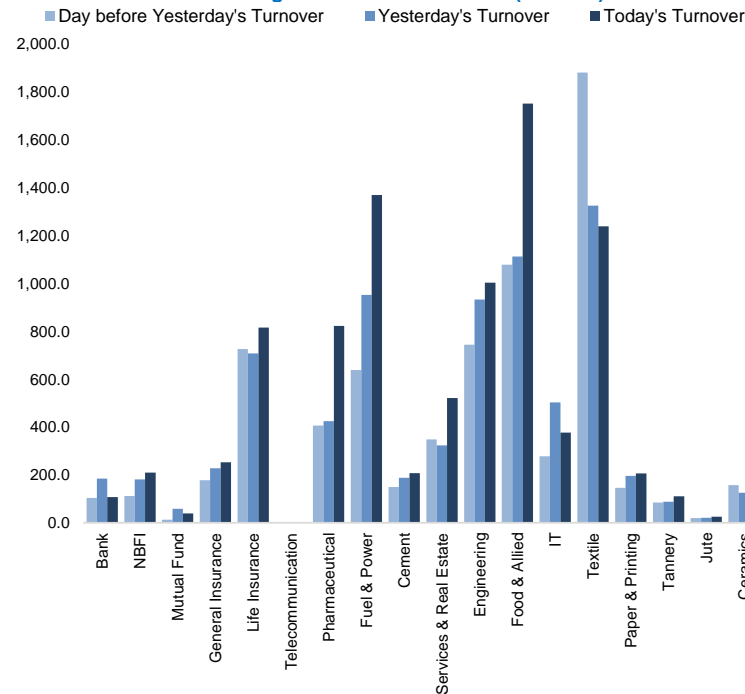
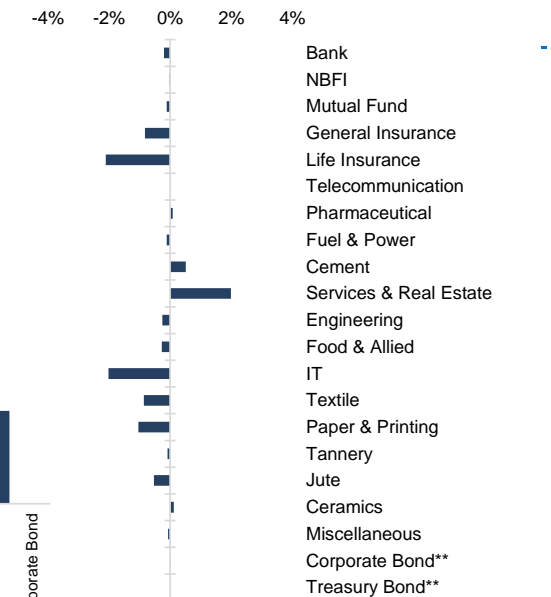


Figure: Sectorial Mcap Change



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	1,447	1,450	-2.93	-0.20%	35	682,106	9.1%	106.7	1.1%	11.9x	0.7x	GP	386,996	8.5%	2.8	13.0x	7.2x
NBFI	1,929	1,929	-0.34	-0.02%	23	187,667	2.5%	209.2	2.1%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	833	834	-0.95	-0.11%	37	37,691	0.5%	38.7	0.4%	NM	0.7x	BATBC	280,098	6.2%	1.4	15.3x	6.9x
General Insurance	3,242	3,269	-26.94	-0.82%	42	94,616	1.3%	253.3	2.6%	17.3x	1.5x	SQURPHARMA	185,977	4.1%	10.3	9.9x	1.7x
Life Insurance	2,908	2,970	-62.35	-2.10%	15	81,285	1.1%	816.2	8.4%	NM	NM	ROBI	157,138	3.5%	0.2	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	3.0	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,704	3,701	+3.11	+0.08%	34	718,495	9.6%	822.5	8.4%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,703	1,705	-1.90	-0.11%	23	449,275	6.0%	1,370.0	14.1%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.3	12.0x	1.2x
Cement	2,565	2,552	+13.10	+0.51%	7	123,199	1.6%	207.8	2.1%	31.3x	2.7x	BERGERPBL	81,310	1.8%	1.2	27.0x	6.3x
Services & Real Esta	2,043	2,003	+39.92	+1.99%	8	80,699	1.1%	521.4	5.3%	27.4x	1.0x	LHBL	79,322	1.7%	49.7	14.7x	4.0x
Engineering	4,515	4,527	-11.25	-0.25%	42	529,960	7.1%	1,003.3	10.3%	72.5x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,686	21,746	-59.33	-0.27%	21	401,283	5.4%	1,752.1	18.0%	20.1x	8.2x	BXPHARMA	65,222	1.4%	0.2	14.6x	1.5x
IT	3,236	3,303	-66.54	-2.01%	11	42,195	0.6%	376.4	3.9%	29.5x	3.0x	BRACBANK	57,596	1.3%	0.1	9.0x	0.9x
Textile	1,644	1,658	-14.17	-0.85%	58	172,178	2.3%	1,239.2	12.7%	84.8x	1.1x	BEACONPHAR	56,595	1.2%	0.1	80.9x	9.2x
Paper & Printing	10,730	10,842	-112.22	-1.03%	6	41,342	0.6%	206.7	2.1%	39.9x	2.1x	ISLAMIBANK	52,486	1.2%	0.1	8.9x	0.8x
Tannery	3,259	3,261	-2.74	-0.08%	6	34,417	0.5%	110.9	1.1%	49.6x	3.4x	DUTCHBANGL	44,203	1.0%	4.9	7.6x	1.0x
Jute	14,898	14,978	-79.75	-0.53%	3	3,645	0.0%	25.3	0.3%	NM	-1265.2x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	697	696	+0.86	+0.12%	5	32,232	0.4%	299.3	3.1%	48.6x	1.9x	UNILEVERCL	39,838	0.9%	0.8	45.3x	13.2x
Miscellaneous	4,144	4,147	-2.83	-0.07%	14	225,617	3.0%	387.8	4.0%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.01	+0.01%	10	36,590	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	91	91	-	-	236	2,918,432	39.1%	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
CENTRALPHL	13.2	+10.0%	64.4	NM	2.3x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	FUWANGFOOD	34.1	-3.1%	965.0	NM	8.6x
KEYACOSMET	7.0	+6.1%	154.4	NM	0.5x	BATBC	74,086	4.3%	15.3x	6.9x	AOL	37.4	+2.5%	767.3	23.9x	2.0x
SEAPEARL	230.3	+5.7%	283.5	33.4x	13.3x	BEXIMCO	69,196	4.0%	12.0x	1.2x	LRBDL	36.5	-4.2%	347.5	16.7x	1.0x
LEGACYFOOT	105.7	+5.1%	76.7	NM	11.8x	RENATA	68,042	4.0%	38.0x	4.6x	SEAPEARL	230.3	+5.7%	283.5	33.4x	13.3x
HEIDELBCEM	295.8	+4.9%	134.5	52.0x	4.4x	BXPHARMA	45,564	2.6%	14.6x	1.5x	GENNEXT	7.9	-1.3%	283.4	NM	0.7x
FASFIN	5.9	+3.5%	39.7	NM	NM	BEACONPHAR	39,617	2.3%	80.9x	9.2x	FUWANGCER	20.4	+1.0%	278.8	78.5x	1.7x
ILFSL	6.2	+3.3%	21.5	NM	NM	GP	38,700	2.2%	13.0x	7.2x	YPL	27.4	+1.1%	255.9	NM	5.1x
SILCOPHL	24.8	+2.9%	42.7	37.6x	1.1x	BRACBANK	30,976	1.8%	9.0x	0.9x	OAL	15.8	-9.2%	199.0	NM	1.3x
IBP	18.1	+2.8%	66.8	NM	1.3x	LHBL	26,980	1.6%	14.7x	4.0x	DELTALIFE	150.3	+0.1%	191.1	NM	NM
FARCHEM	11.3	+2.7%	64.3	NM	1.0x	EBL	24,998	1.5%	6.9x	0.9x	KBPPWBIL	27.5	+0.4%	181.1	NM	2.3x
						OLYMPIC	19,683	1.1%	18.0x	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%	33.4x	13.3x						
						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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RUPALILIFE	242.0	211.3	336.6	1,578	20
SEAPEARL	220.0	217.0	226.3	1,042	8
IPDC	55.9	55.9	120.1	2,148	3
BRACBANK	32.3	32.3	39.3	1,216	4
CNATEX	9.8	9.8	34.6	3,529	8
GP	286.6	261.6	24.7	93	22
BEXIMCO	114.9	104.1	24.6	216	5
SQURPHARMA	209.7	209.0	20.9	100	13
RENATA	1,141.8	1,141.8	17.7	16	5
NAVANAPHAR	115.0	108.0	14.3	131	5
COPPERTECH	36.5	34.1	13.3	369	13
BBSCABLES	49.8	45.0	10.4	228	12
ORIONPHARM	81.8	71.9	9.2	122	15
PTL	75.0	71.9	9.1	123	10
BATBC	485.0	479.8	8.6	18	10
GSPFINANCE	30.3	27.4	8.4	280	3
FORTUNE	75.6	74.9	8.3	110	2
AL-HAJTEX	180.0	171.0	7.8	45	7
MARICO	2,360.1	2,352.0	7.7	3	6
MLDYEING	24.8	23.5	7.3	305	3
HRTEX	118.0	104.4	6.6	58	5
GPHISPAT	41.7	40.4	6.4	158	10
<b>Total</b>			<b>1,090.4</b>		<b>344</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

##### ISLAMIBANK

The company vide its shareholding report of Sponsors/ Directors for the month of June, 2023 has informed that the directorship of Armada Spinning Mills Limited, Kingsway Endeavors Limited and Uniglobe Business Resources Limited has been withdrawn from the company. The company has also informed that Mr. Ahsanul Alam, nominated by JMC Builders Ltd. was appointed as Shareholder Director and Chairman of the company. As such, the shareholding of Sponsors/ Directors as per shareholding report as on June 30, 2023 has decreased from 50.9725% to 41.9010% (a decrease of 9.0715%) from that of the previous month.

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