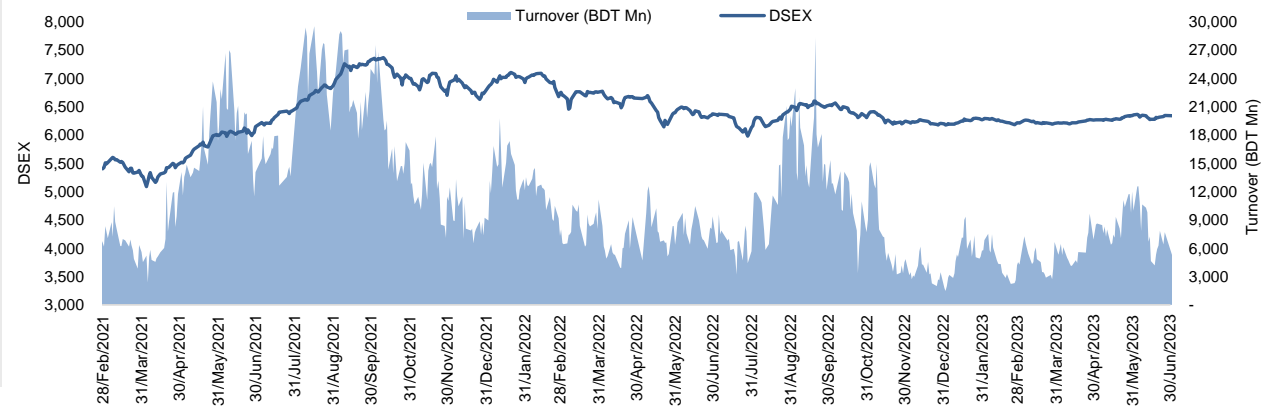


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.04%) gained 2.78 points and closed at 6,327.99. The blue-chip index DS30 (+0.06%), the Shariah-based index DSES (-0.06%), and the large-cap index CDSET (-0.04%) closed at 2,192.08, 1,373.39, and 1,210.50 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.05% followed by Pharmaceutical (+0.04%), Telecommunication (0.00%). NBFi experienced the highest loss of 0.12% followed by Food & Allied (-0.09%), Engineering (-0.08%), Fuel & Power (-0.07%). Block trades contributed 5.6% of the overall market turnover. Fu Wang Food Ltd. (+10.0%) was the most traded share with a turnover of BDT 606 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,327.99	6,325.20	+2.78	+0.04%	+2.0%
DS30	2,192.08	2,190.78	+1.30	+0.06%	-0.1%
DSES	1,373.39	1,374.25	-0.86	-0.06%	+1.1%
CDSET	1,210.50	1,210.94	-0.44	-0.04%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	73	113	180	366
A Category (Equity)	49	55	132	236
B Category (Equity)	17	47	37	101
N Category (Equity)	4	0	1	5
Z Category (Equity)	3	11	10	24
Mutual Funds	0	3	24	27
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,606,124	7,661,340	-0.7%
	Mn USD	69,829	70,336	
Turnover	Mn BDT	6,457	10,840	-40.4%
	Mn USD	59	100	
Volume	Mn Shares	200	346	-42.0%
No. of Trade		157,699	223,826	-29.5%

\* Average Interbank Exchange Rate is BDT 108.93 as of Jul 10, 2023

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Figure: Sectorial Turnover (BDT Mn)

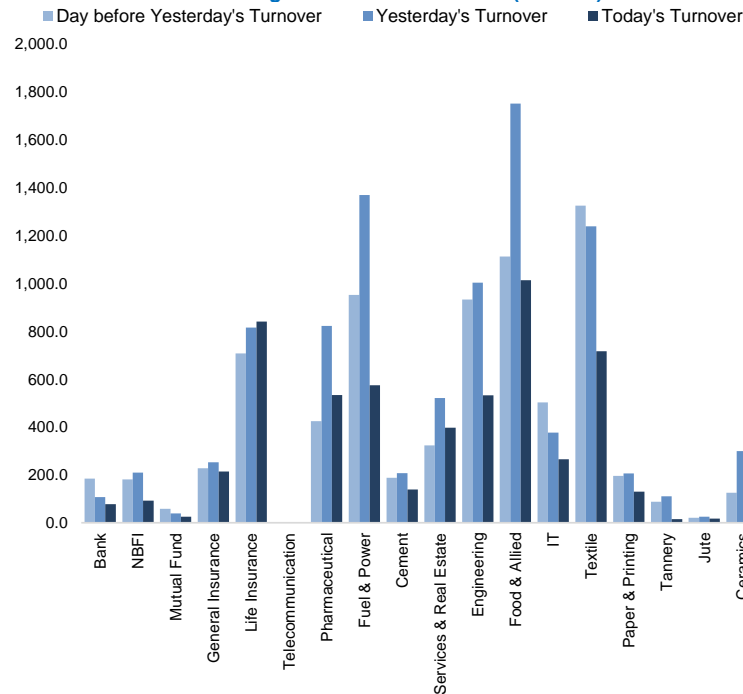
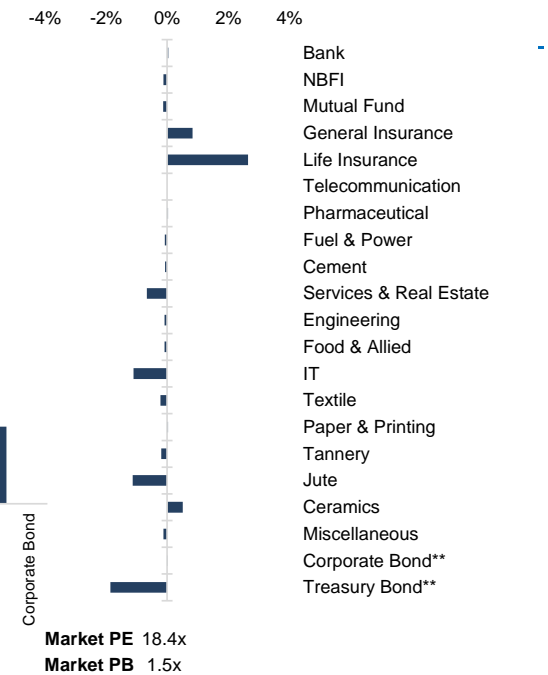


Figure: Sectorial Mcap Change



\* 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	1,448	1,447	+0.66	+0.05%	35	682,417	9.2%	78.0	1.3%	11.9x	0.7x	GP	386,996	8.5%	0.4	13.0x	7.2x
NBFI	1,926	1,929	-2.31	-0.12%	23	187,442	2.5%	92.0	1.5%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	833	-1.09	-0.13%	37	37,642	0.5%	25.0	0.4%	NM	0.7x	BATBC	280,098	6.2%	1.5	15.3x	6.9x
General Insurance	3,269	3,242	+26.98	+0.83%	42	95,403	1.3%	214.5	3.5%	17.4x	1.5x	SQURPHARMA	185,977	4.1%	5.0	9.9x	1.7x
Life Insurance	2,985	2,908	+77.09	+2.65%	15	83,440	1.1%	841.0	13.8%	NM	NM	ROBI	157,138	3.5%	0.2	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	0.7	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,705	3,704	+1.34	+0.04%	34	718,755	9.7%	533.6	8.8%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,702	1,703	-1.27	-0.07%	23	448,940	6.1%	574.8	9.4%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,563	2,565	-1.73	-0.07%	7	123,116	1.7%	139.6	2.3%	31.3x	2.7x	BERGERPBL	81,287	1.8%	0.5	27.0x	6.3x
Services & Real Esta	2,029	2,043	-13.44	-0.66%	8	80,168	1.1%	397.3	6.5%	27.3x	1.0x	LHBL	79,206	1.7%	42.3	14.6x	4.0x
Engineering	4,512	4,515	-3.72	-0.08%	42	529,523	7.1%	532.3	8.7%	72.4x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,668	21,686	-18.46	-0.09%	21	400,942	5.4%	1,013.5	16.6%	20.1x	8.2x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,201	3,236	-35.64	-1.10%	11	41,730	0.6%	265.7	4.4%	29.2x	3.0x	BRACBANK	57,596	1.3%	0.0	9.0x	0.9x
Textile	1,641	1,644	-3.53	-0.21%	58	171,809	2.3%	717.3	11.8%	84.7x	1.1x	BEACONPHAR	56,595	1.2%	1.8	80.9x	9.2x
Paper & Printing	10,734	10,730	+3.45	+0.03%	6	41,356	0.6%	130.4	2.1%	39.9x	2.1x	ISLAMIBANK	52,486	1.2%	0.1	8.9x	0.8x
Tannery	3,252	3,259	-6.33	-0.19%	6	34,350	0.5%	15.3	0.3%	49.5x	3.4x	DUTCHBANGL	44,203	1.0%	0.4	7.6x	1.0x
Jute	14,731	14,898	-167.17	-1.12%	3	3,604	0.0%	17.8	0.3%	NM	-1251.0x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	700	697	+3.57	+0.51%	5	32,397	0.4%	185.0	3.0%	48.9x	1.9x	UNILEVERCL	39,784	0.9%	0.7	45.2x	13.2x
Miscellaneous	4,139	4,144	-4.87	-0.12%	14	225,352	3.0%	322.7	5.3%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.01	+0.02%	10	36,590	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.3	12.1x	0.9x
Treasury Bond**	90	91	-1.69	-1.85%	236	2,864,423	38.6%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOD	37.5	+10.0%	605.5	NM	9.5x
CENTRALPHL	14.5	+9.8%	92.8	NM	2.5x
FUWANGCER	21.7	+6.4%	169.7	83.5x	1.8x
DELTALIFE	159.5	+6.1%	285.3	NM	NM
GLOBALINS	32.7	+5.8%	13.6	21.1x	2.3x
MEGHNAINS	45.4	+5.6%	22.7	29.5x	3.0x
FARCHEM	11.9	+5.3%	83.8	NM	1x
MEGHNALIFE	91.1	+5.2%	110.0	NM	NM
PRIMELIFE	77.0	+5.0%	38.9	NM	NM
NITOLINS	38.3	+4.9%	2.5	19.4x	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ILFSL	5.9	-4.8%	5.2	NM	NM
SHURWID	14.5	-4.6%	4.3	NM	1x
AIL	70.7	-4.5%	38.9	44.2x	3.1x
CAPMIBLMF	14.3	-4.0%	12.2	NM	1.6x
SAFKOSPINN	19.6	-3.9%	8.3	NM	1.0x
SIMTEX	23.0	-3.8%	41.0	25.3x	1.0x
RSRMSTEEL	18.9	-3.6%	3.5	NM	0.4x
SONARGAON	36.8	-3.4%	30.8	NM	3.2x
FASFIN	5.7	-3.4%	9.2	NM	NM
KBPPWBIL	26.6	-3.3%	127.6	NM	2.2x

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%	14.6x	4.0x
EBL	24,998	1.5%	6.9x	0.9x
OLYMPIC	19,683	1.1%	17.8x	2.9x
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%	33.3x	13.3x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	15,220	0.9%	14.9x	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
FUWANGFOOD	37.5	+10.0%	605.5	NM	9.5x
DELTALIFE	159.5	+6.1%	285.3	NM	NM
SEAPEARL	229.7	-0.3%	270.9	33.3x	13.3x
LRBDL	36.3	-0.5%	242.5	16.6x	0.9x
RUPALILIFE	223.7	+3.5%	211.6	NM	NM
FUWANGCER	21.7	+6.4%	169.7	83.5x	1.8x
GENNEXT	7.9	-	169.4	NM	0.7x
AOL	36.6	-2.1%	167.4	23.4x	1.9x
BSC	120.3	-0.3%	143.8	7.7x	1.5x
KBPPWBIL	26.6	-3.3%	127.6	NM	2.2x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RUPALILIFE	225.1	198.0	18.0	305	63.45
SQURPHARMA	211.0	209.0	16.0	147	30.72
GP	261.7	261.6	24.0	114	29.75
ORIONPHARM	79.9	71.7	10.0	366	28.69
BNICL	56.7	56.7	1.0	300	17.01
NATLIFEINS	177.0	170.0	2.0	79	13.92
BPML	85.4	82.8	2.0	127	10.51
EMERALDOIL	164.0	161.1	4.0	64	10.51
SIMTEX	24.3	24.3	2.0	330	8.02
PRAGATILIF	125.0	125.0	2.0	64	7.98

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RUPALILIFE	225.1	198.0	63.5	305	18
SQURPHARMA	211.0	209.0	30.7	147	16
GP	261.7	261.6	29.7	114	24
ORIONPHARM	79.9	71.7	28.7	366	10
BNICL	56.7	56.7	17.0	300	1
NATLIFEINS	177.0	170.0	13.9	79	2
BPML	85.4	82.8	10.5	127	2
EMERALDOIL	164.0	161.1	10.5	64	4
SIMTEX	24.3	24.3	8.0	330	2
PRAGATILIF	125.0	125.0	8.0	64	2
PTL	76.9	70.0	7.9	110	12
SEAPEARL	231.0	215.0	7.7	35	4
RDFOOD	48.5	48.5	6.0	124	1
BATBC	520.0	479.8	5.1	10	7
ICB	88.0	88.0	5.0	56	2
DOREENPWR	59.6	54.9	4.5	77	3
AIL	79.0	74.2	4.2	55	2
NAVANAPHAR	115.9	115.8	4.0	35	2
CONFIDCEM	81.2	81.2	3.9	48	1
FORTUNE	74.5	74.5	3.7	50	1
HRTEX	110.0	104.4	3.7	35	7
PIONEERINS	72.0	72.0	3.6	50	1
<b>Total</b>			<b>360.2</b>		<b>227</b>

#### Important DSE News

##### NCCBANK

Mr. Nisar Kader, one of the Sponsors of the company, has expressed his intention to sell 3,00,000 shares out of his holding of 20,45,907 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange Limited (DSE) within next 30 working days.

#### 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

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