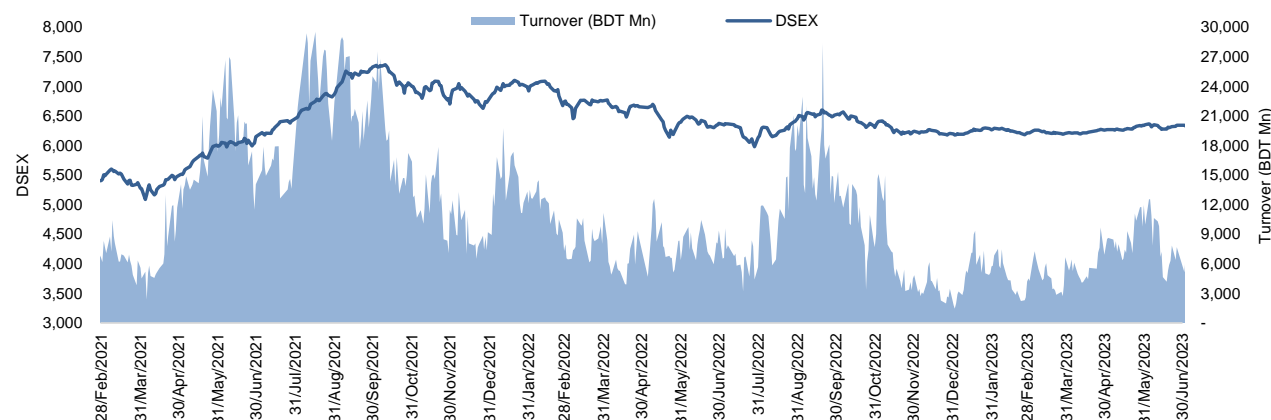


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.14%) gained 8.8 points and closed at 6,336.79. The blue-chip index DS30 (+0.10%), the Shariah-based index DSES (+0.10%), and the large-cap index CDSET (+0.02%) closed at 2,194.36, 1,374.74, and 1,210.71 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.23% followed by Food & Allied (+0.21%), Pharmaceutical (+0.11%), Fuel & Power (+0.01%). NBF1 experienced the highest loss of 0.06% followed by Engineering (-0.02%), Telecommunication (0.00%). Block trades contributed 11.1% of the overall market turnover. Fu Wang Food Ltd. (+4.0%) was the most traded share with a turnover of BDT 703 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,336.79	6,327.99	+8.80	+0.14%	+2.1%
DS30	2,194.36	2,192.08	+2.28	+0.10%	-0.0%
DSES	1,374.74	1,373.39	+1.34	+0.10%	+1.2%
CDSET	1,210.71	1,210.50	+0.21	+0.02%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	92	94	186	372
A Category (Equity)	49	53	136	238
B Category (Equity)	32	36	36	104
N Category (Equity)	2	2	1	5
Z Category (Equity)	9	3	13	25
Mutual Funds	1	2	26	29
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,611,335	7,606,124	+0.1%
	Mn USD	69,931	69,884	
Turnover	Mn BDT	8,552	6,457	+32.4%
	Mn USD	79	59	
Volume	Mn Shares	233	200	+16.3%
No. of Trade		179,264	157,699	+13.7%

\* Average Interbank Exchange Rate is BDT 108.84 as of Jul 11, 2023

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Figure: Sectorial Turnover (BDT Mn)

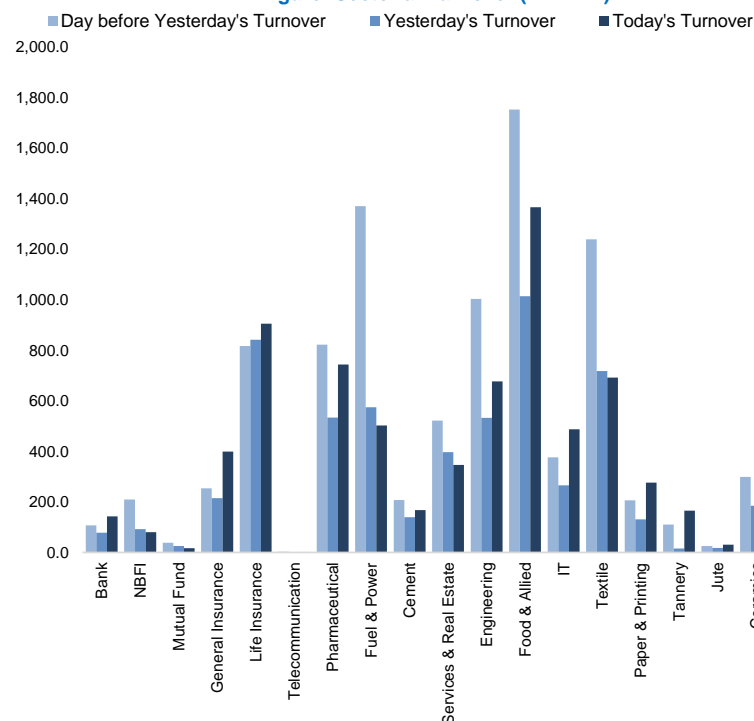
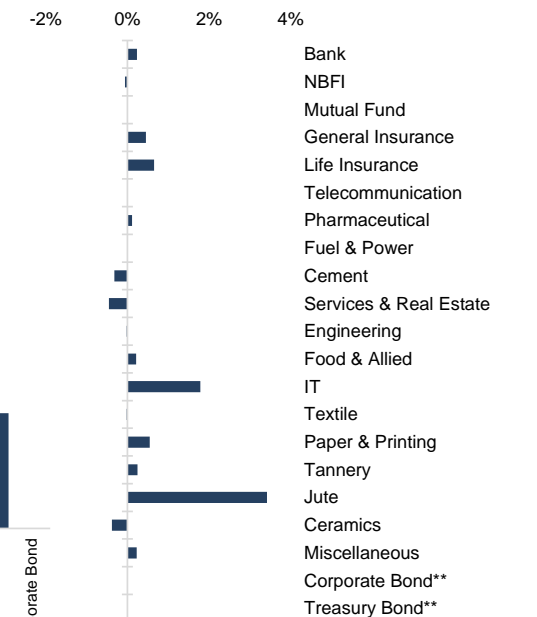


Figure: Sectorial Mcap Change



Market PE 24.4x

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	1,451	1,448	+3.39	+0.23%	35	684,015	9.2%	143.1	1.9%	11.9x	0.7x	GP	386,996	8.5%	0.8	13.0x	7.2x
NBFI	1,925	1,926	-1.16	-0.06%	23	187,329	2.5%	80.4	1.1%	NM	4.4x	WALTONHIL	317,378	7.0%	0.2	49.1x	3.2x
Mutual Fund	832	832	-0.06	-0.01%	37	37,639	0.5%	17.3	0.2%	NM	0.7x	BATBC	280,098	6.1%	1.9	15.3x	6.9x
General Insurance	3,284	3,269	+14.88	+0.46%	42	95,838	1.3%	399.0	5.2%	17.5x	1.5x	SQURPHARMA	185,977	4.1%	36.0	9.9x	1.7x
Life Insurance	3,005	2,985	+19.57	+0.66%	15	83,987	1.1%	905.5	11.9%	NM	NM	ROBI	157,138	3.4%	0.0	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	1.1	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,710	3,705	+4.26	+0.11%	34	719,581	9.7%	743.1	9.8%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.2	16.7x	4.4x
Fuel & Power	1,702	1,702	+0.15	+0.01%	23	448,981	6.0%	502.3	6.6%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,555	2,563	-8.19	-0.32%	7	122,723	1.7%	167.3	2.2%	31.2x	2.7x	BERGERPBL	81,240	1.8%	0.6	27.0x	6.3x
Services & Real Estate	2,020	2,029	-9.22	-0.45%	8	79,804	1.1%	346.4	4.6%	27.1x	1.0x	LHBL	79,206	1.7%	64.7	14.6x	4.0x
Engineering	4,511	4,512	-0.98	-0.02%	42	529,408	7.1%	676.6	8.9%	72.4x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,714	21,668	+45.90	+0.21%	21	401,791	5.4%	1,366.1	18.0%	20.2x	8.2x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,258	3,201	+57.35	+1.79%	11	42,478	0.6%	487.2	6.4%	29.7x	3.1x	BRACBANK	57,596	1.3%	2.8	9.0x	0.9x
Textile	1,641	1,641	-0.28	-0.02%	58	171,780	2.3%	691.6	9.1%	84.6x	1.1x	BEACONPHAR	56,595	1.2%	0.1	80.9x	9.2x
Paper & Printing	10,792	10,734	+58.85	+0.55%	6	41,582	0.6%	276.1	3.6%	40.1x	2.1x	ISLAMIBANK	52,486	1.2%	0.8	8.9x	0.8x
Tannery	3,260	3,252	+8.02	+0.25%	6	34,435	0.5%	165.2	2.2%	49.6x	3.4x	DUTCHBANGL	44,203	1.0%	0.1	7.6x	1.0x
Jute	15,235	14,731	+504.54	+3.43%	3	3,727	0.1%	30.5	0.4%	NM	-1293.8x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	698	700	-2.68	-0.38%	5	32,273	0.4%	151.1	2.0%	48.7x	1.9x	UNILEVERCL	39,674	0.9%	1.1	45.1x	13.2x
Miscellaneous	4,148	4,139	+9.49	+0.23%	14	225,868	3.0%	456.4	6.0%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.1	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%	0.0	12.1x	0.9x
Treasury Bond**	90	90	+0.00	+0.00%	236	2,864,448	38.6%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
WMSHIPYARD	12.2	+9.9%	128.9	NM	0.6x
RUPALIBANK	31.3	+9.8%	40.7	39.9x	0.9x
JANATAINS	30.6	+9.7%	27.6	21.8x	2.0x
ORIONINFU	352.3	+8.7%	159.4	NM	25.6x
APEXFOODS	442.0	+8.7%	131.4	44.5x	3.5x
CNATEX	12.0	+8.1%	159.2	NM	0.8x
CITYGENINS	49.6	+6.4%	132.2	20.7x	3x
FINEFOODS	121.5	+6.4%	23.2	NM	11.6x
ADNTEL	145.8	+5.7%	261.3	37.9x	5.3x
MIRACLEIND	30.8	+5.5%	25.3	NM	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
OAL	14.3	-8.3%	130.3	NM	1.2x
YPL	25.6	-4.8%	102.1	NM	5x
FUWANGCER	20.7	-4.6%	127.9	79.6x	1.7x
PROGRESLIF	92.9	-4.0%	13.8	NM	NM
ARAMITCEM	25.3	-3.8%	6.5	NM	26.1x
GENNEXT	7.6	-3.8%	105.1	NM	0.6x
PRIMELIFE	74.3	-3.5%	38.7	NM	NM
CLICL	68.9	-3.1%	17.7	NM	NM
LRBDL	35.2	-3.0%	312.1	16.1x	0.9x
SONALILIFE	80.3	-3.0%	37.4	NM	NM

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%	17.7x	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%	32.9x	13.2x
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
FUWANGFOOD	39.0	+4.0%	702.6	NM	9.8x
DELTALIFE	166.2	+4.2%	441.1	NM	NM
LRBDL	35.2	-3.0%	312.1	16.1x	0.9x
ADNTEL	145.8	+5.7%	261.3	37.9x	5.3x
SEAPEARL	227.3	-1.0%	212.2	32.9x	13.2x
KBPPWBIL	26.7	+0.4%	197.1	NM	2.2x
BSC	123.2	+2.4%	177.5	7.8x	1.5x
RUPALILIFE	235.8	+5.4%	165.5	NM	NM
ORIONINFU	352.3	+8.7%	159.4	NM	25.6x
CNATEX	12.0	+8.1%	159.2	NM	0.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ISLAMIBANK	32.6	32.6	2.0	6,000	195.60
RUPALILIFE	230.1	210.2	17.0	654	143.33
KBPPWBIL	28.0	28.0	3.0	5,000	140.00
GEMINISEA	805.0	805.0	2.0	143	115.12
NAVANAPHAR	111.0	109.3	8.0	390	42.70
BRACBANK	34.0	32.3	3.0	1,032	35.02
AOL	35.5	34.1	24.0	763	26.74
GP	261.6	261.6	15.0	62	16.24
ADVENT	27.0	27.0	3.0	600	16.20
CNATEX	10.1	10.0	6.0	1,069	10.71

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ISLAMIBANK	32.6	32.6	195.6	6,000	2
RUPALILIFE	230.1	210.2	143.3	654	17
KBPPWBIL	28.0	28.0	140.0	5,000	3
GEMINISEA	805.0	805.0	115.1	143	2
NAVANAPHAR	111.0	109.3	42.7	390	8
BRACBANK	34.0	32.3	35.0	1,032	3
AOL	35.5	34.1	26.7	763	24
GP	261.6	261.6	16.2	62	15
ADVENT	27.0	27.0	16.2	600	3
CNATEX	10.1	10.0	10.7	1,069	6
IFIC	12.3	10.1	9.8	850	6
INTRACO	48.0	48.0	9.6	200	2
ADNTEL	143.0	138.0	9.5	68	4
SQURPHARMA	209.8	209.2	8.7	42	12
OLYMPIC	154.0	154.0	7.4	48	1
UNIONINS	60.0	55.0	7.3	126	3
EMERALDOIL	164.8	162.5	7.3	45	5
RENATA	1,217.9	1,217.9	6.8	6	1
AAMRANET	70.1	69.9	6.6	94	3
UNIQUEHRL	62.1	62.0	6.5	105	3
BEACONPHAR	240.0	240.0	6.0	25	1
COPPERTECH	36.3	33.3	6.0	169	3
<b>Total</b>			<b>945.7</b>		<b>248</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

##### JANATAINS

**(Q2 Un-audited):** EPS was Tk. 0.75 for April-June 2023 as against Tk. 0.49 for April-June 2022; EPS was Tk. 1.14 for January-June 2023 as against Tk. 0.93 for January-June 2022. NOCFPS was Tk. 0.74 for January-June 2023 as against Tk. 1.06 for January-June 2022. NAV per share was Tk. 15.69 as on June 30, 2023 and Tk. 14.55 as on December 31, 2022.

##### MTB

Mr. Syed Manzur Elahi, one of the Sponsor Directors of the Company, has further informed that he has completed his buying of 6,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 21.06.2023.

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