BRAC EPL STOCK BROKERAGE LTD

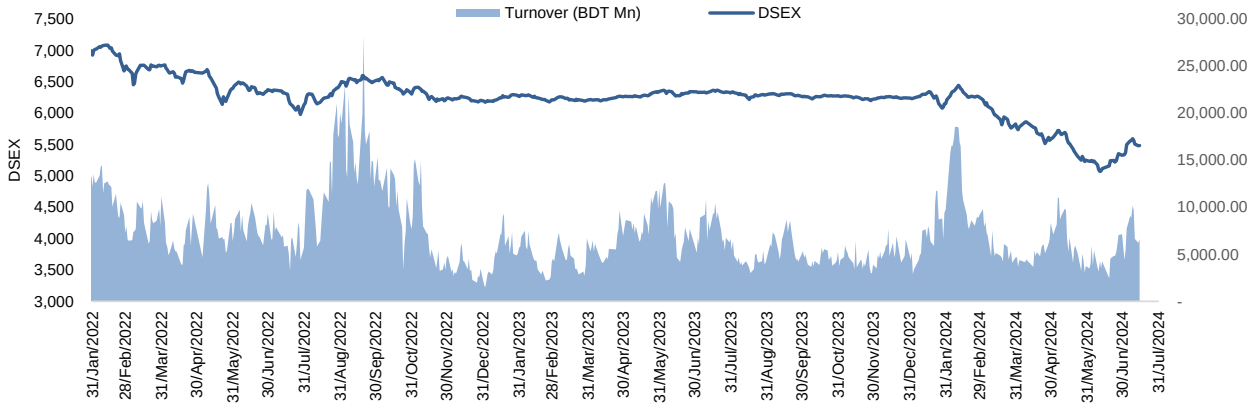
Monday, July 15, 2024

# DSEX Index Closing 5,484.97 ↑ (+2.17, +0.04%)

**Market closed in green**

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.04%) gained 2.17 points and closed at 5,484.97. The blue-chip index DS30 (+0.37%), the Shariah-based index DSES (+0.06%), and the large-cap index CDSET (-0.06%) closed at 1,944.29, 1,203.43, and 1,048.95 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 3.75%, followed by Pharmaceutical (+0.37%), NBFI (+0.14%), Food & Allied (+0.14%), Telecommunication (-0.09%), Bank (-0.31%), and Fuel & Power (-0.32%), respectively. Block trades contributed 7.7% of the overall market turnover. Orion Infusion Ltd. (+7.1%) was the most traded share with a turnover of BDT 572 million.




| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|---|---|---|---|---|---|
| DSEX | 5,484.97 | 5,482.79 | +2.17 | +0.04% | -12.2% |
| DS30 | 1,944.29 | 1,937.11 | +7.18 | +0.37% | -7.1% |
| DSES | 1,203.43 | 1,202.70 | +0.73 | +0.06% | -11.8% |
| CDSET | 1,048.95 | 1,049.58 | -0.63 | -0.06% | -12.8% |

| | Advanced | Declined | Unchanged | Total |
|---|---|---|---|---|
| All Category | 140 | 191 | 66 | 397 |
| A Category (Equity) | 90 | 105 | 42 | 237 |
| B Category (Equity) | 31 | 57 | 13 | 101 |
| N Category (Equity) | 2 | 3 | 0 | 5 |
| Z Category (Equity) | 17 | 26 | 11 | 54 |
| Mutual Funds | 3 | 21 | 13 | 37 |
| Corporate Bonds | 0 | 1 | 2 | 3 |
| Treasury Bonds | 0 | 0 | 0 | 0 |

** Based on Traded Scrips*

| | | Today | Last Day | Daily %Δ |
|---|---|---|---|---|
| Mcap | Mn BDT | 6,637,527 | 6,621,486 | +0.2% |
| | Mn USD | 56,250 | 56,114 | |
| Turnover | Mn BDT | 6,622 | 6,223 | +6.4% |
| | Mn USD | 56 | 53 | |
| Volume | Mn Shares | 181 | 185 | -2.7% |
| No. of Trade | | 172,388 | 167,075 | +3.2% |

** Average Interbank Exchange Rate is BDT 118.00 as of Jul 15, 2024*

**Figure: Sectorial Turnover (BDT Mn)**

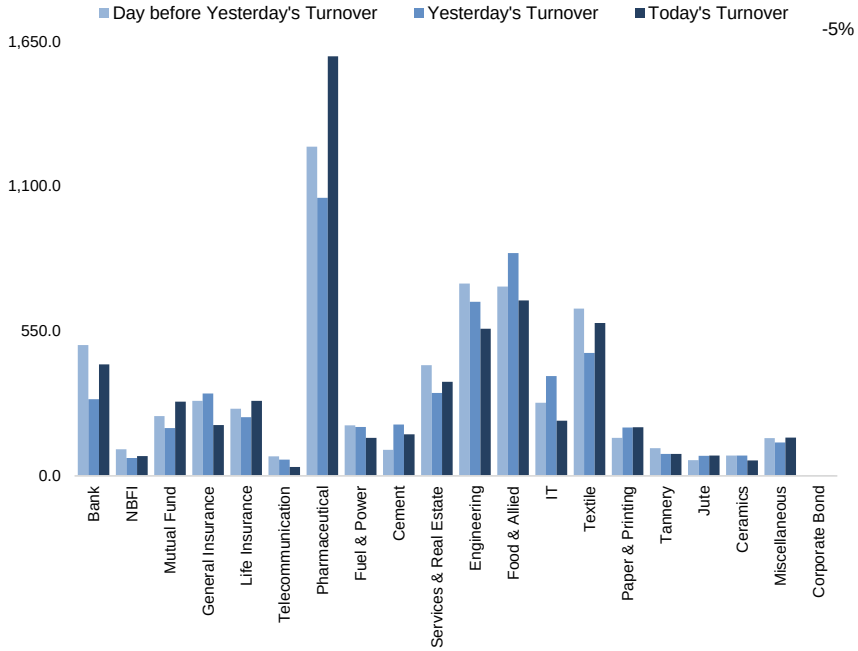
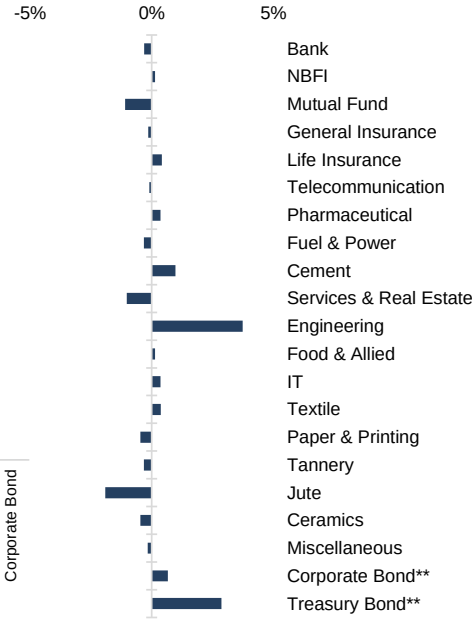



**Figure: Sectorial Mcap Change**




**Market PE** 14.7x
**Market PB** 1.2x

**** Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL***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BRAC EPL STOCK BROKERAGE LTD

# Daily Market Update

| Sector Index | Closing | Opening | Points Δ | %Δ | No. of Companies | Mcap (BDT Mn) | % of Total Mcap | Turnover (BDT Mn) | % of Total Turnover | PE | PB |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Bank | 1,334 | 1,338 | -4.12 | -0.31% | 36 | 638,876 | 9.6% | 423.3 | 6.9% | 7.3x | 0.6x |
| NBFI | 1,176 | 1,174 | +1.65 | +0.14% | 23 | 113,822 | 1.7% | 75.5 | 1.2% | NM | NM |
| Mutual Fund | 682 | 689 | -7.51 | -1.09% | 37 | 31,857 | 0.5% | 281.7 | 4.6% | NM | 0.6x |
| General Insurance | 3,240 | 3,244 | -4.61 | -0.14% | 43 | 93,846 | 1.4% | 192.8 | 3.2% | 17.0x | 1.4x |
| Life Insurance | 2,079 | 2,070 | +8.64 | +0.42% | 15 | 55,271 | 0.8% | 284.7 | 4.7% | NM | NM |
| Telecommunication | 4,114 | 4,118 | -3.78 | -0.09% | 3 | 476,352 | 7.2% | 33.9 | 0.6% | 10.7x | 2.9x |
| Pharmaceutical | 3,233 | 3,222 | +11.77 | +0.37% | 34 | 617,327 | 9.3% | 1,593.3 | 26.1% | 16.7x | 1.8x |
| Fuel & Power | 1,244 | 1,248 | -4.01 | -0.32% | 23 | 327,641 | 4.9% | 144.8 | 2.4% | 21.5x | 0.7x |
| Cement | 2,418 | 2,395 | +23.50 | +0.98% | 7 | 115,497 | 1.7% | 158.3 | 2.6% | 16.7x | 2.3x |
| Services & Real Estate | 1,502 | 1,517 | -15.59 | -1.03% | 9 | 83,022 | 1.3% | 357.5 | 5.9% | 26.0x | 0.6x |
| Engineering | 3,117 | 3,005 | +112.54 | +3.75% | 42 | 360,148 | 5.4% | 559.0 | 9.1% | 15.1x | 1.1x |
| Food & Allied | 16,443 | 16,420 | +22.27 | +0.14% | 21 | 301,884 | 4.5% | 666.4 | 10.9% | 16.1x | 5.1x |
| IT | 2,620 | 2,611 | +9.58 | +0.37% | 11 | 34,475 | 0.5% | 209.4 | 3.4% | 28.4x | 2.2x |
| Textile | 1,266 | 1,261 | +4.73 | +0.38% | 58 | 131,374 | 2.0% | 580.1 | 9.5% | NM | 0.9x |
| Paper & Printing | 7,227 | 7,261 | -34.19 | -0.47% | 6 | 33,157 | 0.5% | 184.8 | 3.0% | 46.6x | 1.4x |
| Tannery | 2,443 | 2,451 | -7.95 | -0.32% | 6 | 26,762 | 0.4% | 83.5 | 1.4% | 38.5x | 2.6x |
| Jute | 17,784 | 18,130 | -345.66 | -1.91% | 3 | 4,167 | 0.1% | 77.5 | 1.3% | NM | NM |
| Ceramics | 517 | 520 | -2.42 | -0.46% | 5 | 22,971 | 0.3% | 58.9 | 1.0% | 44.9x | 1.4x |
| Miscellaneous | 4,289 | 4,296 | -7.01 | -0.16% | 15 | 233,677 | 3.5% | 145.7 | 2.4% | 39.4x | 1.8x |
| Corporate Bond** | 6,660 | 6,616 | +43.98 | +0.66% | 16 | 41,784 | 0.6% | 0.1 | 0.0% | NM | NM |
| Treasury Bond** | 228 | 221 | +6.34 | +2.87% | 238 | 2,893,190 | 43.6% | 0.0 | 0.0% | NM | NM |

| Top Twenty Market Cap | Mcap (BDT Mn) | % of Total Mcap | Turnover (BDT Mn) | PE | PB |
|---|---|---|---|---|---|
| GP | 330,283 | 8.9% | 9.6 | 8.5x | 4.1x |
| WALTONHIL | 192,057 | 5.2% | 18.0 | 14.8x | 1.8x |
| SQURPHARMA | 189,346 | 5.1% | 33.2 | 9.4x | 1.6x |
| BATBC | 181,278 | 4.9% | 30.1 | 10.4x | 3.5x |
| ROBI | 126,758 | 3.4% | 20.1 | 33.2x | 1.9x |
| BEXIMCO | 103,842 | 2.8% | 0.0 | NM | 1.2x |
| RENATA | 84,394 | 2.3% | 2.2 | 36.8x | 2.6x |
| BERGERPBL | 83,809 | 2.2% | 1.8 | 25.8x | 6.2x |
| UPGDCL | 78,607 | 2.1% | 2.1 | 10.5x | 2.3x |
| LHBL | 71,889 | 1.9% | 14.2 | 12.7x | 3.0x |
| BRACBANK | 64,771 | 1.7% | 33.5 | 7.3x | 0.9x |
| BXPHARMA | 52,864 | 1.4% | 20.8 | 9.9x | 1.1x |
| ISLAMIBANK | 52,486 | 1.4% | 0.0 | 8.3x | 0.7x |
| ICB | 50,388 | 1.4% | 1.7 | NM | 1.2x |
| UNILEVERCL | 49,868 | 1.3% | 59.0 | 57.8x | 19.3x |
| DUTCHBANGL | 41,920 | 1.1% | 3.9 | 5.2x | 0.8x |
| EBL | 36,126 | 1.0% | 173.1 | 5.5x | 0.8x |
| POWERGRID | 36,095 | 1.0% | 1.1 | NM | 0.2x |
| BEACONPHAR | 33,980 | 0.9% | 10.3 | 75.4x | 5.6x |
| BESTHLDNG | 30,824 | 0.8% | 54.9 | 22.4x | 0.5x |

| Top Ten Gainers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|---|---|---|---|---|---|
| ISNLTD | 49.8 | +9.9% | 19.6 | NM | 16.5x |
| TECHNODRUG | 29.0 | +9.8% | 0.0 | NM | 1.0x |
| FEKDIL | 20.7 | +7.8% | 164.7 | 13.3x | 1.0x |
| WALTONHIL | 634.0 | +7.5% | 18.0 | 14.8x | 1.8x |
| ORIONINFU | 566.1 | +7.1% | 572.4 | NM | 37.9x |
| MITHUNKNIT | 26.3 | +6.5% | 6.8 | NM | 8.3x |
| FARCHEM | 23.9 | +6.2% | 29.8 | NM | 1x |
| SONARGAON | 28.9 | +5.9% | 8.6 | NM | 1.5x |
| MEGCONMILK | 32.6 | +4.8% | 9.3 | NM | NM |
| CENTRALPHL | 21.6 | +4.3% | 97.4 | NM | 3.0x |

| Top Ten Losers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB |
|---|---|---|---|---|---|
| LINDEBD | 1,080.1 | -3.0% | 4.0 | 29.3x | 2.7x |
| SALVOCHEM | 51.8 | -3.0% | 162.1 | 25.4x | 3x |
| BEACHHATCH | 91.9 | -3.0% | 149.7 | 47.6x | 7.4x |
| OIMEX | 29.6 | -3.0% | 111.3 | 82.7x | 9.5x |
| KBPPWBIL | 125.3 | -2.9% | 11.7 | NM | 10.6x |
| ICBIBANK | 3.3 | -2.9% | 5.2 | NM | NM |
| EGEN | 36.5 | -2.9% | 51.4 | 24.8x | 1.6x |
| GOLDENSON | 20.3 | -2.9% | 78.2 | NM | 1.1x |
| IFIC1STMF | 3.4 | -2.9% | 0.1 | NM | 0.4x |
| PHPMF1 | 3.4 | -2.9% | 0.2 | NM | 0.4x |

| Top Twenty Free Float Mcap | Free Float Mcap (BDT Mn) | % of Total Free Float Mcap | PE | PB |
|---|---|---|---|---|
| SQURPHARMA | 117,112 | 8.6% | 9.4x | 1.6x |
| BEXIMCO | 69,460 | 5.1% | NM | 1.2x |
| BATBC | 45,948 | 3.4% | 10.4x | 3.5x |
| RENATA | 35,002 | 2.6% | 36.8x | 2.6x |
| ISLAMIBANK | 33,649 | 2.5% | 8.3x | 0.7x |
| BXPHARMA | 32,479 | 2.4% | 9.9x | 1.1x |
| BRACBANK | 32,157 | 2.4% | 7.3x | 0.9x |
| GP | 30,004 | 2.2% | 8.5x | 4.1x |
| LHBL | 24,690 | 1.8% | 12.7x | 3.0x |
| EBL | 24,199 | 1.8% | 5.5x | 0.8x |
| PUBALIBANK | 20,448 | 1.5% | 4.0x | 0.6x |
| NBL | 16,930 | 1.2% | NM | 1.3x |
| CITYBANK | 16,830 | 1.2% | 4.2x | 0.7x |
| BSRMLTD | 14,210 | 1.0% | 4.6x | 0.6x |
| ALARABANK | 13,534 | 1.0% | 11.1x | 1.1x |
| PRIMEBANK | 12,985 | 1.0% | 4.7x | 0.7x |
| OLYMPIC | 12,616 | 0.9% | 15.5x | 2.5x |
| UTTARABANK | 11,350 | 0.8% | 11.6x | 0.8x |
| ORIONPHARM | 11,317 | 0.8% | 16.3x | 0.8x |
| ROBI | 10,738 | 0.8% | 33.2x | 1.9x |

** 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 |
|---|---|---|---|---|---|
| ORIONINFU | 566.1 | +7.1% | 572.4 | NM | 37.9x |
| SEAPEARL | 83.9 | -0.4% | 244.4 | 28.2x | 4.3x |
| LOVELLO | 106.4 | +2.3% | 182.2 | 77.1x | 8.1x |
| EBL | 26.6 | - | 173.1 | 5.5x | 0.8x |
| FEKDIL | 20.7 | +7.8% | 164.7 | 13.3x | 1.0x |
| SALVOCHEM | 51.8 | -3.0% | 162.1 | 25.4x | 3.1x |
| GHCL | 47.0 | +1.3% | 158.9 | NM | 1.1x |
| BEACHHATCH | 91.9 | -3.0% | 149.7 | 47.6x | 7.4x |
| SONALIPAPR | 315.0 | -0.3% | 147.0 | 95.7x | 1.8x |
| GEMINISEA | 313.6 | -1.7% | 116.2 | 44.4x | 14.3x |

| Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|---|---|---|---|---|---|
| RENATA | 735.0 | 735.0 | 5.0 | 151 | 110.83 |
| ORIONINFU | 550.0 | 517.1 | 9.0 | 182 | 96.28 |
| EIL | 43.5 | 42.3 | 6.0 | 1,621 | 68.60 |
| NBL | 6.4 | 6.4 | 1.0 | 9,452 | 60.49 |
| LOVELLO | 114.4 | 100.9 | 12.0 | 584 | 59.24 |
| RELIANCE1 | 21.8 | 21.0 | 7.0 | 858 | 18.49 |
| PREMIERCEM | 71.0 | 69.0 | 7.0 | 225 | 15.87 |
| BEACHHATCH | 96.0 | 92.0 | 6.0 | 128 | 12.05 |
| ACTIVEFINE | 16.1 | 16.1 | 1.0 | 500 | 8.05 |
| MEGHNACEM | 80.7 | 80.5 | 6.0 | 98 | 7.86 |

| Block Trade | Maximum Price (BDT) | Minimum Price | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|---|---|---|---|---|---|
| RENATA | 735.0 | 735.0 | 110.8 | 151 | 5 |
| ORIONINFU | 550.0 | 517.1 | 96.3 | 182 | 9 |
| EIL | 43.5 | 42.3 | 68.6 | 1,621 | 6 |
| NBL | 6.4 | 6.4 | 60.5 | 9,452 | 1 |
| LOVELLO | 114.4 | 100.9 | 59.2 | 584 | 12 |
| RELIANCE1 | 21.8 | 21.0 | 18.5 | 858 | 7 |
| PREMIERCEM | 71.0 | 69.0 | 15.9 | 225 | 7 |
| BEACHHATCH | 96.0 | 92.0 | 12.1 | 128 | 6 |
| ACTIVEFINE | 16.1 | 16.1 | 8.1 | 500 | 1 |
| MEGHNACEM | 80.7 | 80.5 | 7.9 | 98 | 6 |
| CENTRALINS | 62.0 | 61.9 | 5.3 | 85 | 2 |
| TOSRIFA | 26.3 | 25.8 | 4.7 | 180 | 3 |
| FEKDIL | 19.9 | 18.8 | 4.2 | 219 | 4 |
| EMERALDOIL | 47.8 | 47.7 | 4.0 | 83 | 2 |
| SICL | 31.8 | 31.8 | 3.2 | 100 | 1 |
| SHEPHERD | 14.4 | 14.4 | 2.9 | 200 | 1 |
| ADNTEL | 104.0 | 104.0 | 2.6 | 25 | 1 |
| LEGACYFOOT | 70.4 | 70.4 | 2.6 | 37 | 1 |
| CAPITECGBF | 14.4 | 14.3 | 2.4 | 170 | 3 |
| SAIFPOWER | 23.0 | 23.0 | 2.3 | 100 | 1 |
| AAMRANET | 38.0 | 38.0 | 2.0 | 53 | 1 |
| SALVOCHEM | 58.7 | 58.7 | 1.5 | 25 | 2 |
| **Total** | | | **511.3** | | **101** |

## Important DSE News

## Upcoming Corporate Events

| DSE Ticker | Right Share | Dividend | | Event | Date |
|---|---|---|---|---|---|
| | | Stock | Cash | | |
| 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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