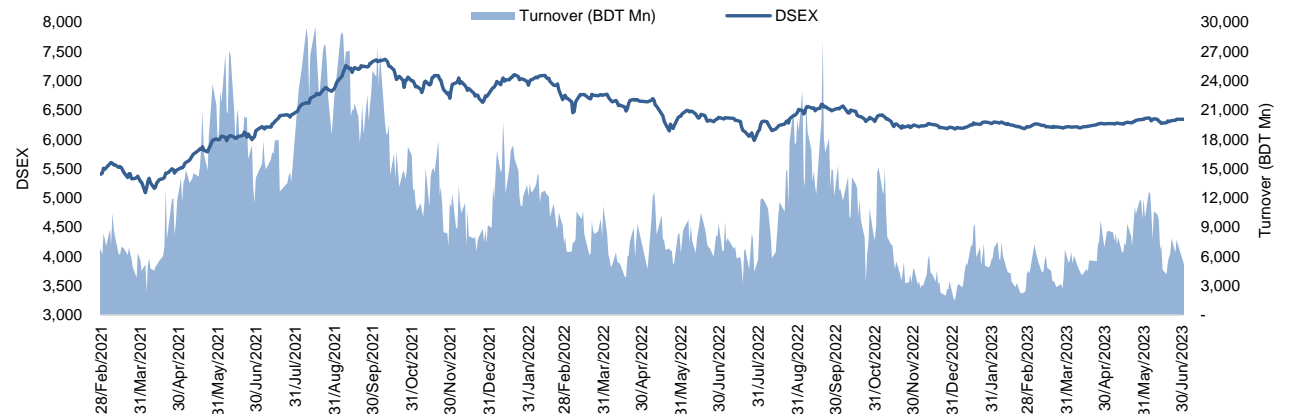


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.42%) gained 26.32 points and closed at 6,367.42. The blue-chip index DS30 (+0.27%), the Shariah-based index DSES (+0.57%), and the large-cap index CDSET (+0.26%) closed at 2,202.89, 1,387.30, and 1,214.49 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.31% followed by Food & Allied (+0.28%), Fuel & Power (+0.13%), Engineering (+0.12%), Bank (+0.05%), Telecommunication (0.00%), and NBFi (-0.02%), respectively. Block trades contributed 3.5% of the overall market turnover. Fu Wang Food Ltd. (+1.4%) was the most traded share with a turnover of BDT 681 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,367.42	6,341.10	+26.32	+0.42%	+2.6%
DS30	2,202.89	2,197.03	+5.86	+0.27%	+0.3%
DSES	1,387.30	1,379.42	+7.88	+0.57%	+2.1%
CDSET	1,214.49	1,211.32	+3.17	+0.26%	+0.0%

	Advanced	Declined	Unchanged	Total
All Category	130	62	189	381
A Category (Equity)	78	30	136	244
B Category (Equity)	45	22	39	106
N Category (Equity)	3	0	2	5
Z Category (Equity)	4	10	12	26
Mutual Funds	0	3	29	32
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,624,803	7,611,955	+0.2%
	Mn USD	69,952	69,834	
Turnover	Mn BDT	9,338	7,509	+24.4%
	Mn USD	86	69	
Volume	Mn Shares	252	206	+22.0%
No. of Trade		218,553	165,136	+32.3%

\* Average Interbank Exchange Rate is BDT 109.00 as of Jul 13, 2023

<b>Fahim Hassan</b> Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	<b>HZ Towhidi Khan</b> Senior Research Associate (880) 1708805224 hztowhidi.khan@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

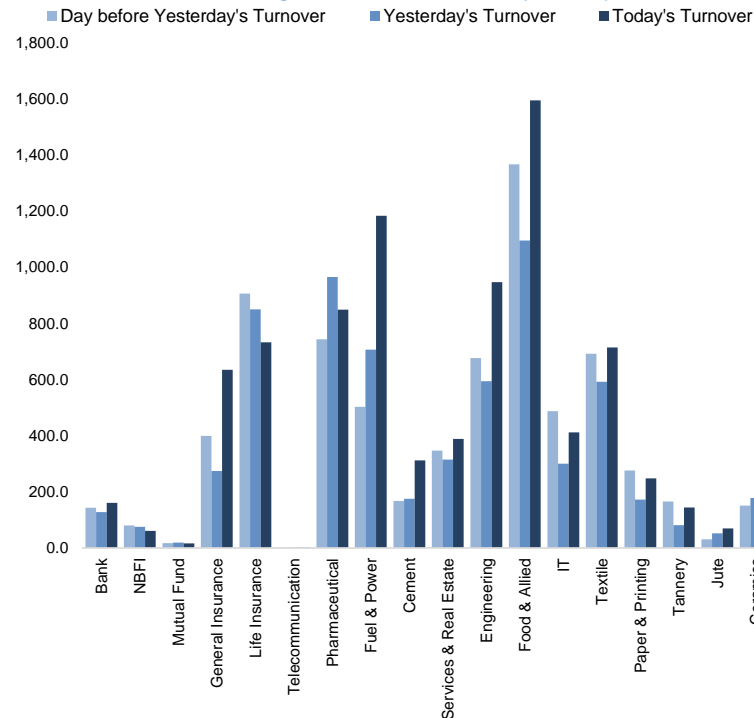
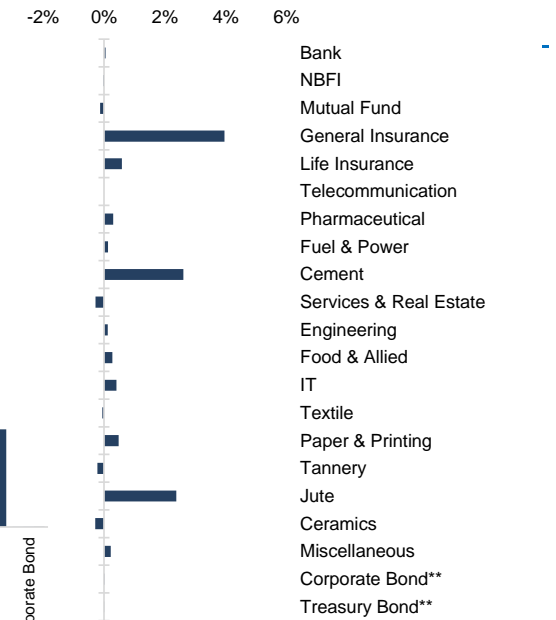


Figure: Sectorial Mcap Change



Market PE 18.8x

Market PB 1.7x

\* 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	1,454	1,453	+0.80	+0.05%	35	685,182	9.2%	160.9	1.8%	11.9x	0.7x	GP	386,996	8.5%	0.8	13.0x	7.2x
NBFI	1,925	1,925	-0.47	-0.02%	23	187,309	2.5%	60.5	0.7%	NM	4.4x	WALTONHIL	317,378	6.9%	0.1	49.1x	3.2x
Mutual Fund	833	834	-1.02	-0.12%	37	37,671	0.5%	15.7	0.2%	NM	0.7x	BATBC	280,098	6.1%	1.3	15.3x	6.9x
General Insurance	3,370	3,242	+128.43	+3.96%	42	98,369	1.3%	634.7	7.0%	18.0x	1.5x	SQURPHARMA	188,016	4.1%	111.3	10.0x	1.7x
Life Insurance	2,962	2,944	+17.42	+0.59%	15	82,779	1.1%	732.4	8.1%	NM	NM	ROBI	157,138	3.4%	0.5	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.8%	1.3	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	1.1	38.0x	4.6x
Pharmaceutical	3,727	3,715	+11.39	+0.31%	34	722,945	9.7%	848.6	9.4%	19.5x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,707	1,705	+2.29	+0.13%	23	450,270	6.1%	1,183.2	13.1%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,654	2,587	+67.43	+2.61%	7	127,469	1.7%	311.8	3.5%	32.4x	2.8x	LHBL	82,922	1.8%	205.2	15.3x	4.2x
Services & Real Estate	2,020	2,026	-5.70	-0.28%	8	79,808	1.1%	387.9	4.3%	27.1x	1.0x	BERGERPBL	81,240	1.8%	0.3	27.0x	6.3x
Engineering	4,524	4,519	+5.48	+0.12%	42	530,979	7.1%	946.9	10.5%	72.6x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,774	21,713	+60.53	+0.28%	21	402,896	5.4%	1,593.8	17.7%	20.2x	8.2x	BXPHARMA	65,222	1.4%	0.5	14.6x	1.5x
IT	3,258	3,245	+13.39	+0.41%	11	42,479	0.6%	411.8	4.6%	29.7x	3.1x	BRACBANK	57,596	1.3%	0.1	9.0x	0.9x
Textile	1,648	1,649	-0.95	-0.06%	58	172,547	2.3%	713.9	7.9%	85.0x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,836	10,784	+52.13	+0.48%	6	41,749	0.6%	248.3	2.8%	40.3x	2.1x	ISLAMIBANK	52,486	1.1%	0.0	8.9x	0.8x
Tannery	3,242	3,249	-6.99	-0.22%	6	34,235	0.5%	144.1	1.6%	49.3x	3.4x	DUTCHBANGL	44,203	1.0%	0.4	7.6x	1.0x
Jute	15,956	15,585	+370.56	+2.38%	3	3,903	0.1%	69.6	0.8%	NM	-1355.0x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	697	699	-2.03	-0.29%	5	32,233	0.4%	199.7	2.2%	48.6x	1.9x	UNILEVERCL	39,302	0.9%	1.2	44.7x	13.0x
Miscellaneous	4,158	4,149	+9.22	+0.22%	14	226,414	3.0%	347.2	3.9%	16.1x	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%	0.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	90	90	+0.00	+0.00%	233	2,862,318	38.5%	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
ICICL	35.3	+10.0%	37.3	30.7x	2.0x	SQURPHARMA	121,499	7.1%	10.0x	1.7x	FUWANGFOOE	43.5	+1.4%	681.0	NM	11.0x
NFML	18.8	+9.9%	59.7	98.9x	1.6x	BATBC	74,086	4.3%	15.3x	6.9x	LRBDL	41.0	+5.9%	588.2	18.7x	1.1x
AZIZPIPES	110.6	+9.9%	34.9	NM	NM	BEXIMCO	69,196	4.0%	12.0x	1.2x	AOL	38.7	+5.2%	374.8	24.8x	2.0x
KBPWBIL	32.2	+9.9%	57.6	NM	2.7x	RENATA	68,042	4.0%	38.0x	4.6x	DELTALIFE	170.6	+2.6%	242.4	NM	NM
PARAMOUNT	46.7	+9.9%	23.6	26.7x	1.8x	BXPHARMA	45,564	2.6%	14.6x	1.5x	RDFOOD	52.7	+8.0%	220.9	42.8x	3.3x
GLOBALINS	34.5	+9.9%	36.8	22.3x	2.4x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	LHBL	71.4	+2.9%	205.2	15.3x	4.2x
MIRACLEIND	33.5	+9.8%	25.2	NM	1x	GP	38,700	2.2%	13.0x	7.2x	RUPALILIFE	205.1	-4.7%	201.5	NM	NM
MEGHNAINS	47.0	+9.8%	61.9	30.5x	3.1x	BRACBANK	30,976	1.8%	9.0x	0.9x	YPL	28.5	+2.2%	192.9	NM	5.3x
WMSHIPYARD	14.6	+9.8%	150.5	NM	0.7x	LHBL	26,980	1.6%	15.3x	4.2x	FUWANGCER	20.8	-1.9%	160.4	80.0x	1.7x
CONTININS	33.7	+9.8%	19.5	54.4x	1.5x	EBL	24,998	1.5%	6.9x	0.9x	OAL	15.9	+1.3%	159.8	NM	1.3x
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)
MEGHNAPET	37.4	-5.3%	3.5	NM	NM	NBL	19,116	1.1%	NM	0.7x	RENATA	1,235.0	1,217.9	2.0	23	27.75
MONNOAGML	930.6	-4.7%	48.5	NM	5x	PUBALIBANK	18,314	1.1%	4.7x	0.6x	BRACBANK	32.3	32.3	10.0	842	27.20
RUPALILIFE	205.1	-4.7%	201.5	NM	NM	CITYBANK	18,211	1.1%	5.5x	0.8x	SEAPEARL	235.0	211.0	5.0	115	25.93
APEXFOOT	291.9	-4.5%	74.9	26.6x	1.3x	SEAPEARL	16,847	1.0%	32.5x	13.0x	RDFOOD	52.0	44.5	9.0	509	25.55
PROGRESLIF	80.3	-4.1%	14.1	NM	NM	ROBI	15,714	0.9%	85.7x	2.3x	INTRACO	51.0	49.9	4.0	371	18.54
GENNEXT	7.9	-3.7%	133.0	NM	0.7x	ALARABANK	15,220	0.9%	14.9x	1.1x	NAVANAPHAR	109.0	109.0	1.0	100	10.90
CNATEX	11.4	-3.4%	44.6	NM	0.8x	PRIMEBANK	14,248	0.8%	5.6x	0.7x	ACTIVEFINE	18.0	17.4	12.0	618	10.84
CAPMIBBLMF	14.7	-3.3%	8.5	NM	1.6x	BSRMLTD	14,210	0.8%	NM	0.7x	AL-HAJTEX	175.0	170.0	3.0	48	8.30
ALLTEX	18.1	-3.2%	15.0	NM	2.6x	UPGDCL	13,547	0.8%	16.7x	4.4x	FINEFOODS	122.5	121.0	2.0	65	7.90
SEAPEARL	224.1	-2.7%	159.4	32.5x	13.0x						BATBC	482.0	479.8	13.0	16	7.84
<div><div>* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.</div><div>** The base of the Bond Index starts at 100, starting from Jan 13, 2022</div><div>Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022</div></div>																

\* 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
RENATA	1,235.0	1,217.9	27.7	23	2
BRACBANK	32.3	32.3	27.2	842	10
SEAPEARL	235.0	211.0	25.9	115	5
RDFOOD	52.0	44.5	25.6	509	9
INTRACO	51.0	49.9	18.5	371	4
NAVANAPHAR	109.0	109.0	10.9	100	1
ACTIVEFINE	18.0	17.4	10.8	618	12
AL-HAJTEX	175.0	170.0	8.3	48	3
FINEFOODS	122.5	121.0	7.9	65	2
BATBC	482.0	479.8	7.8	16	13
UNIQUEHRL	74.5	74.2	7.8	105	4
BXPHERMA	146.2	138.9	7.5	52	7
EGEN	42.2	42.0	7.0	165	2
RUPALILIFE	200.0	196.5	5.6	28	3
FORTUNE	73.7	69.7	5.4	74	4
FAREASTLIF	73.0	68.7	5.3	75	8
FUWANGFOOD	45.0	39.7	5.0	113	3
ICB	87.6	87.6	4.8	55	1
SIMTEX	24.9	24.9	4.7	188	2
GP	265.0	264.4	4.6	17	8
BBSCABLES	48.6	45.0	4.5	95	4
SONALIANS	440.7	440.7	4.2	10	2
<b>Total</b>			<b>325.2</b>		<b>228</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

##### PRAGATIINS

**(Q2 Un-audited):** EPS was Tk. 1.46 for April-June 2023 as against Tk. 1.81 (restated) for April-June 2022; EPS was Tk. 2.65 for January-June 2023 as against Tk. 3.02 (restated) for January-June 2022. NOCFPS was Tk. 1.85 for January-June 2023 as against Tk. 3.54 (restated) for January-June 2022. NAV per share was Tk. 56.74 as on June 30, 2023 and Tk. 59.01 as on December 31, 2022.

##### TRUSTBANK

**(Q2 Un-audited):** Consolidated EPS was Tk. 1.42 for April-June 2023 as against Tk. 0.94 for April-June 2022; Consolidated EPS was Tk. 1.77 for January-June 2023 as against Tk. 2.15 for January-June 2022. Consolidated NOCFPS was Tk. 35.75 for January-June 2023 as against Tk. 20.20 for January-June 2022. Consolidated NAV per share was Tk. 27.57 as on June 30, 2023 and Tk. 25.92 as on June 30, 2022.

##### ICBIBANK

**(Q2 Un-audited):** EPS was Tk. (0.23) for April-June 2023 as against Tk. 0.15 for April-June 2022; EPS was Tk. (0.39) for January-June 2023 as against Tk. 0.02 for January-June 2022. NOCFPS was Tk. 0.27 for January-June 2023 as against Tk. (0.39) for January-June 2022. NAV per share was Tk. (18.91) as on June 30, 2023 and Tk. (18.12) as on June 30, 2022.

##### BANKASIA

The company has informed that the Board of Directors of the company has approved the proposal for Bank Asia Limited for becoming a sponsor shareholder by way of investment of BDT 12,50,00,000.00 (10% of total paid-up capital) for the proposed Digital Bank.

##### PAPERPROC

Refer to their earlier news disseminated by DSE on 13.03.2023, the company has further informed that the Board of Directors of the company has decided to hold an EGM on August 26, 2023 at 12:00 PM via Digital Platform to approve the Draft Scheme of amalgamation of Magura Paper Mills Ltd. with Paper Processing and Packaging Ltd. in accordance with the order of the Honorable High Court dated May 30, 2023 passed in the company matter no. 151 of 2023. Record date for the EGM: 03.08.2023.

##### MONOSPOOL

Refer to the earlier news disseminated on 12.03.2023, the company has further informed that the Board of Directors of the company has decided to hold an EGM on August 26, 2023 at 10:30 AM via Digital Platform to approve the Draft Scheme of amalgamation of Pearl Paper and Board Mills Ltd. with Bangladesh Monospool Paper Manufacturing Co. Limited in accordance with the order of the Honorable High Court dated May 30, 2023 passed in the company matter no. 142 of 2023. Record date for the EGM: 03.08.2023.

##### SANDHANINS

The Company has informed that Mr. Kazi Mahabub who was a Sponsor Director of the company passed away on 23.01.2022. His total holding of 21,95,995 shares of the company will be transmitted among his successors according to the Succession Certificate issued by the Honorable Court.

##### UTTARAFIN

The company has informed that Bangladesh Bank has appointed Mr. Babul Chandra Debnath, current DGM, Finance Division of ICB, as a Director in the Board of Directors of the company.

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