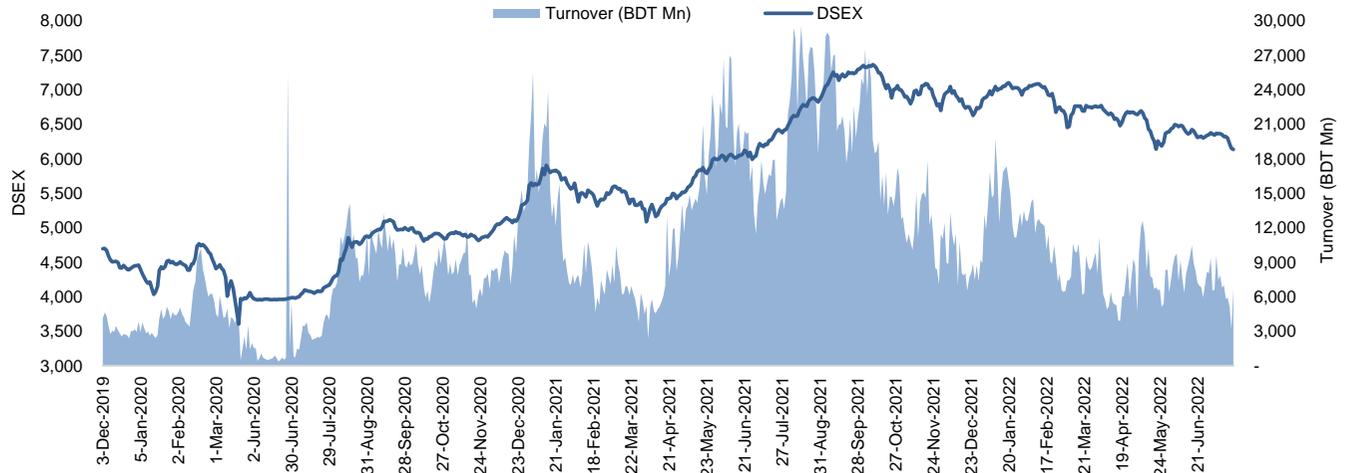


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.23%) lost 14.39 points and closed at 6,138.79. The blue-chip index DS30 (-0.32%), the Shariah-based index DSES (-0.13%), and the large-cap index CDSET (-0.21%) closed at 2,206.08, 1,346.26, and 1,216.88 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 0.36% followed by Pharmaceutical (+0.20%), Bank (+0.15%). Fuel & Power experienced the highest loss of 1.08% followed by Telecommunication (-0.37%), Engineering (-0.28%), Food & Allied (-0.17%). Block trades contributed 1.7% of the overall market turnover. Bangladesh Export Import Company Ltd. (-1.8%) was the most traded share with a turnover of BDT 522 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,138.79	6,153.18	-14.39	-0.23%	-9.1%
DS30	2,206.08	2,213.24	-7.15	-0.32%	-12.9%
DSES	1,346.26	1,348.06	-1.80	-0.13%	-5.9%
CDSET	1,216.88	1,219.50	-2.62	-0.21%	-10.5%

	Advanced	Declined	Unchanged	Total
All Category	110	218	53	381
A Category (Equity)	85	146	33	264
B Category (Equity)	18	58	13	89
N Category (Equity)	1	3	1	5
Z Category (Equity)	6	11	6	23
Mutual Funds	8	10	17	35
Corporate Bonds	2	1	0	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,028,463	5,040,989	-0.2%
	Mn USD	53,523	53,656	
Turnover	Mn BDT	6,656	3,194	+108.4%
	Mn USD	71	34	
Volume	Mn Shares	167	101	+65.7%
No. of Trade		137,857	76,197	+80.9%

\* Exchange Rate is BDT 93.95 as of Jul 20, 2022

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Figure: Sectorial Turnover (BDT)

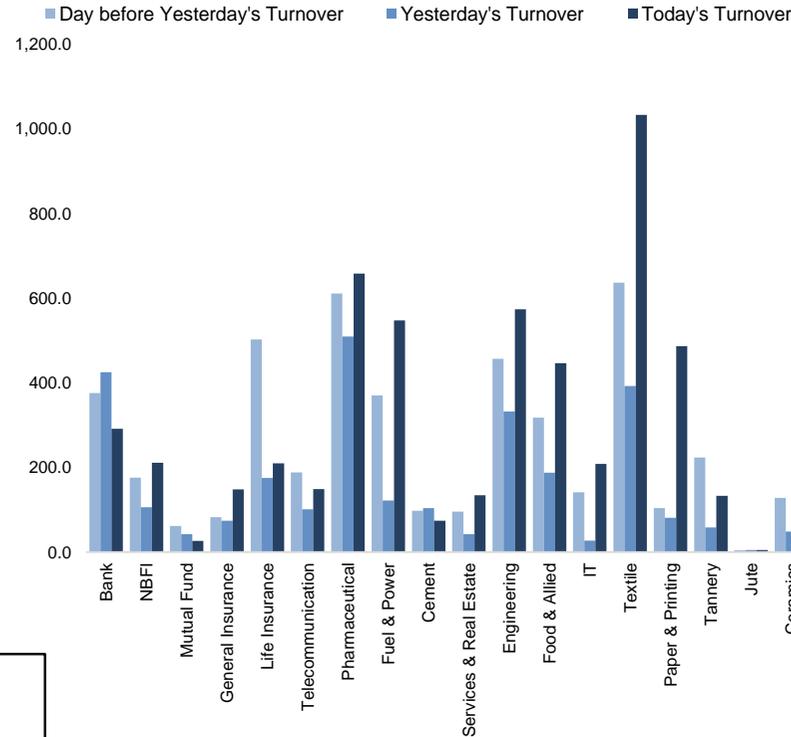
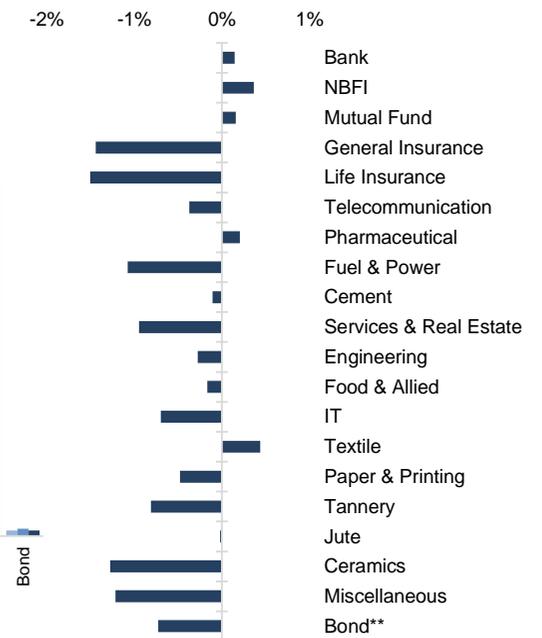


Figure: Sectorial Mcap Change



Market PE 15.3x  
 Market PB 1.7x

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	1,419	1,416	+2.06	+0.15%	33	654,276	14.8%	291.6	4.6%	7.8x	0.8x	GP	386,186	8.8%	53.8	11.3x	7.7x
NBFI	1,936	1,929	+7.01	+0.36%	23	190,731	4.3%	211.0	3.3%	NM	3.5x	WALTONHIL	319,801	7.3%	2.1	22.4x	3.3x
Mutual Fund	856	855	+1.35	+0.16%	36	37,720	0.9%	26.1	0.4%	NM	0.8x	BATBC	281,340	6.4%	86.6	18.4x	8.6x
General Insurance	3,080	3,125	-44.99	-1.44%	41	91,036	2.1%	147.9	2.3%	14.5x	1.5x	SQURPHARMA	188,725	4.3%	57.6	10.2x	1.9x
Life Insurance	2,302	2,337	-35.18	-1.51%	13	66,328	1.5%	210.0	3.3%	NM	NM	ROBI	163,947	3.7%	28.5	89.4x	2.5x
Telecommunication	4,987	5,006	-18.65	-0.37%	3	587,204	13.3%	149.1	2.3%	15.4x	4.6x	RENATA	139,898	3.2%	13.4	25.3x	4.9x
Pharmaceutical	3,690	3,683	+7.53	+0.20%	32	693,002	15.7%	658.1	10.3%	17.1x	2.5x	UPGDCL	137,852	3.1%	6.4	11.2x	4.2x
Fuel & Power	1,754	1,773	-19.10	-1.08%	23	457,913	10.4%	547.2	8.6%	11.4x	1.2x	BEXIMCO	104,194	2.4%	522.3	7.2x	1.4x
Cement	2,349	2,351	-2.53	-0.11%	7	113,196	2.6%	74.3	1.2%	24.0x	2.5x	BERGERPBL	79,584	1.8%	1.3	27.4x	7.5x
Services & Real Estate	1,340	1,352	-12.79	-0.95%	8	50,662	1.1%	134.5	2.1%	70.5x	1.0x	ICB	77,278	1.8%	2.8	43.7x	1.7x
Engineering	4,544	4,556	-12.54	-0.28%	42	532,038	12.1%	573.6	9.0%	18.5x	1.9x	LHBL	76,070	1.7%	39.8	20.1x	4.3x
Food & Allied	21,228	21,263	-35.13	-0.17%	21	376,959	8.5%	446.3	7.0%	23.0x	8.8x	MARICO	75,839	1.7%	22.8	21.3x	28.2x
IT	2,525	2,542	-17.72	-0.70%	11	32,348	0.7%	208.2	3.3%	26.3x	2.3x	BXPBARMA	65,445	1.5%	38.3	11.4x	1.6x
Textile	1,568	1,561	+6.83	+0.44%	58	169,152	3.8%	1,033.4	16.2%	25.4x	1.0x	BEACONPHAR	58,073	1.3%	10.1	62.1x	10.0x
Paper & Printing	7,535	7,572	-36.12	-0.48%	6	27,583	0.6%	486.7	7.6%	NM	1.9x	BRACBANK	56,571	1.3%	21.2	10.7x	1.0x
Tannery	3,066	3,091	-25.07	-0.81%	6	32,739	0.7%	132.9	2.1%	46.2x	3.2x	ISLAMIBANK	53,130	1.2%	6.2	10.8x	0.8x
Jute	8,690	8,692	-1.85	-0.02%	3	2,003	0.0%	4.9	0.1%	NM	28.3x	DUTCHBANGL	43,832	1.0%	2.7	7.6x	1.2x
Ceramics	733	742	-9.47	-1.28%	5	32,676	0.7%	189.6	3.0%	30.6x	2.0x	TITASGAS	42,833	1.0%	116.7	12.8x	0.6x
Miscellaneous	4,172	4,224	-51.33	-1.22%	15	231,370	5.2%	824.5	13.0%	11.4x	2.0x	POWERGRID	38,915	0.9%	18.0	10.6x	0.4x
Bond**	88	88	-0.64	-0.73%	9	36,246	0.8%	12.9	0.2%	NM	NM	SUMITPOWER	37,696	0.9%	21.2	9.0x	1.0x

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
BIFC	8.6	+8.9%	5.9	NM	NM	SQURPHARMA	123,483	7.5%	10.2x	1.9x	BEXIMCO	118.9	-1.8%	522.3	7.2x	1.4x
HRTEX	115.1	+8.4%	75.9	36.5x	2.7x	BATBC	74,414	4.5%	18.4x	8.6x	SONALIPAPR	617.2	+0.2%	426.8	43.6x	2.5x
AIL	51.9	+7.7%	21.8	33.7x	2.4x	BEXIMCO	69,446	4.2%	7.2x	1.4x	INTRACO	29.3	-1.3%	171.7	28.1x	2.5x
ORIONINFU	105.5	+7.2%	161.3	62.6x	7.8x	RENATA	68,172	4.1%	25.3x	4.9x	ORIONINFU	105.5	+7.2%	161.3	62.6x	7.8x
PRIMETEX	38.8	+6.0%	103.8	12.0x	0.6x	BXPBARMA	45,693	2.8%	11.4x	1.6x	KDSALTD	70.7	+5.1%	124.8	30.6x	2.8x
MLDYEING	25.9	+5.3%	63.8	87.7x	1.7x	BEACONPHAR	40,651	2.5%	62.1x	10.0x	FUWANGFOOL	24.3	-0.8%	121.4	NM	2.1x
KDSALTD	70.7	+5.1%	124.8	30.6x	2.8x	GP	38,619	2.3%	11.3x	7.7x	SPCERAMICS	44.4	-2.0%	119.9	99.6x	1.4x
CNATEX	10.3	+4.0%	27.1	NM	0.7x	BRACBANK	30,413	1.8%	10.7x	1.0x	TITASGAS	43.3	-1.8%	116.7	12.8x	0.6x
BSCCL	224.8	+3.8%	66.8	16.1x	3.3x	LHBL	26,868	1.6%	20.1x	4.3x	FORTUNE	81.7	-1.9%	110.4	26.4x	5.4x
CROWNCEMNT	72.3	+3.7%	3.4	36.7x	1.4x	ISLAMIBANK	25,864	1.6%	10.8x	0.8x	BSC	110.3	+3.1%	109.4	8.2x	1.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	18,883	1.1%	NM	0.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
IPDC	58.8	-2.0%	57.6	24.3x	3.3x	PUBALIBANK	18,032	1.1%	5.8x	0.6x	DELTALIFE	159.9	144.3	10.0	620	90.64
EASTRNLU	1,957.7	-2.0%	13.4	NM	12.9x	CITYBANK	17,776	1.1%	5.0x	0.8x	HRTEX	113.0	104.2	34.0	661	69.95
RENWICKJA	1,021.0	-2.0%	0.6	NM	NM	ROBI	16,395	1.0%	89.4x	2.5x	AL-HAJTEX	126.2	123.7	15.0	230	28.58
LIBRAINFU	962.4	-2.0%	7.6	NM	0.8x	ALARABANK	14,857	0.9%	11.0x	1.1x	BRACBANK	37.5	37.5	4.0	530	19.88
BDFINANCE	44.2	-2.0%	5.6	31.9x	2.4x	OLYMPIC	14,821	0.9%	16.1x	2.6x	UNILEVERCL	2,950.0	2,950.0	3.0	6	17.70
BGIC	39.3	-2.0%	0.7	20.3x	1.9x	BSRMLTD	14,786	0.9%	5.1x	0.7x	KDSALTD	67.3	66.0	5.0	140	9.28
CVOPRL	172.2	-2.0%	59.5	NM	20.0x	SUMITPOWER	13,868	0.8%	9.0x	1.0x	SUNLIFEINS	57.0	56.8	4.0	136	7.77
OLYMPIC	118.3	-2.0%	18.6	16.1x	2.6x	UPGDCL	13,785	0.8%	11.2x	4.2x	ORIONINFU	97.0	96.6	2.0	73	7.01
SPCERAMICS	44.4	-2.0%	119.9	99.6x	1.4x						PADMALIFE	50.0	50.0	3.0	100	5.00
PRIMEINSUR	89.0	-2.0%	6.8	40.6x	4.6x						SPCERAMICS	48.1	45.2	4.0	90	4.21

\*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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
DELTALIFE	159.9	144.3	90.6	620	10
HRTEX	113.0	104.2	70.0	661	34
AL-HAJTEX	126.2	123.7	28.6	230	15
BRACBANK	37.5	37.5	19.9	530	4
UNILEVERCL	2,950.0	2,950.0	17.7	6	3
KDSALTD	67.3	66.0	9.3	140	5
SUNLIFEINS	57.0	56.8	7.8	136	4
ORIONINFU	97.0	96.6	7.0	73	2
PADMALIFE	50.0	50.0	5.0	100	3
SPCERAMICS	48.1	45.2	4.2	90	4
TITASGAS	48.0	43.3	3.8	83	3
ASIAINS	50.0	50.0	3.1	63	1
INTRACO	32.0	32.0	2.2	70	1
INDEXAGRO	103.0	103.0	2.1	21	2
LIBRAINFU	1,030.0	1,030.0	2.1	2	1
FORTUNE	89.8	82.0	2.0	24	3
GOLDENSON	19.4	19.4	1.9	100	1
IPDC	63.0	61.9	1.9	30	2
JHRML	74.5	74.5	1.7	23	1
LRBDL	39.9	39.9	1.6	40	1
ALLTEX	26.6	26.6	1.1	41	1
RAHIMAFood	275.0	275.0	1.1	4	2
<b>Total</b>			<b>293.0</b>		<b>115</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Express Insurance Limited	-	0.0%	10.0%	Record Date	21-Jul-22
Purabi Gen. Insurance Company Ltd.	-	0.0%	10.0%	Record Date	25-Jul-22
Bangladesh Industrial Fin. Co. Ltd.	-	0.0%	0.0%	Record Date	25-Jul-22
National Life Insurance Company Ltd.	-	0.0%	35.0%	Record Date	28-Jul-22
Grameenphone Ltd.	-	0.0%	125.0%	Record Date	10-Aug-22
Rupali Life Insurance Company Limited	-	0.0%	18.0%	Record Date	17-Aug-22

**Important DSE News**
**PRAGATIINS**

**(Q2 Un-audited):** EPS was Tk. 1.90 for April-June 2022 as against Tk. 1.85 for April-June 2021; EPS was Tk. 3.17 for January-June 2022 as against Tk. 3.11 for January-June 2021. NOCFPS was Tk. 3.72 for January-June 2022 as against Tk. 5.36 for January-June 2021. NAV per share was Tk. 56.53 as on June 30, 2022 and Tk. 57.32 as on December 31, 2021.

**SINGERBD**

**(Q2 Un-audited):** EPS was Tk. 1.40 for April-June 2022 as against Tk. 2.89 for April-June 2021; EPS was Tk. 2.31 for January-June 2022 as against Tk. 4.69 for January-June 2021. NOCFPS was Tk. (36.07) for January-June 2022 as against Tk. (36.92) for January-June 2021. NAV per share was Tk. 30.38 as on June 30, 2022 and Tk. 34.06 as on December 31, 2021. The company has also informed that EPS decreased due to COVID-19 pandemic circumstances along with essential commodity's price hike, devaluation of BDT against USD, recent flood etc. NOCFPS has turned into negative due to above reasons, though it has improved slightly compared to previous year.

**TRUSTBANK**

**(Q2 Un-audited):** Consolidated EPS was Tk. 1.03 for April-June 2022 as against Tk. 1.28 for April-June 2021; Consolidated EPS was Tk. 2.22 for January-June 2022 as against Tk. 2.20 for January-June 2021. Consolidated NOCFPS was Tk. 22.22 for January-June 2022 as against Tk. (2.40) for January-June 2021. Consolidated NAV per share was Tk. 28.51 as on June 30, 2022 and Tk. 27.93 as on June 30, 2021.

**ISLAMICFIN**

**(Q2 Un-audited):** EPS was Tk. 0.32 for April-June 2022 as against Tk. 0.33 for April-June 2021; EPS was Tk. 0.62 for January-June 2022 as against Tk. 0.74 for January-June 2021. NOCFPS was Tk. (13.42) for January-June 2022 as against Tk. (3.93) for January-June 2021. NAV per share was Tk. 14.88 as on June 30, 2022 and Tk. 14.74 as on June 30, 2021. The Company has also informed that EPS has decreased due to decline of earning asset and NOCFPS has decreased due to encashment of substantial amount of high cost deposit.

**REPUBLIC**

Mr. Saber Hossain Chowdhury, one of the Directors of the Company, has further informed that he has completed his buy of 1,10,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 06.07.2022.

**TRUSTBANK**

Refer to their earlier news disseminated by DSE on 15.03.2022 regarding fund inject, the company has informed that the Board of Directors decided to inject further BDT 2.03 Crore as fresh capital to Trust Axiata Digital Limited (TADL), a joint venture Company of 'Trust Bank Limited, Bangladesh' holding 51% share and 'Axiata Digital Services Sdn Bhd, Malaysia' holding 49% share, for the purpose of strengthening the capital base and expansion of business.

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