

Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.17%) gained 62.81 points and closed at 5,413.65. The blue-chip index DS30 (+1.27%), the Shariah-based index DSES (+1.18%), and the large-cap index CDSET (+0.88%) closed at 1,932.77, 1,183.37, and 1,036.90 points, respectively. All the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 2.48% followed by Food & Allied (+1.61%), Pharmaceutical (+1.39%), NBFi (+1.31%), Bank (+1.04%), Fuel & Power (+1.01%), and Engineering (+0.95%), respectively. Block trades contributed 4.4% of the overall market turnover. Square Pharmaceuticals Ltd. (+0.6%) was the most traded share with a turnover of BDT 351 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,413.65	5,350.83	+62.81	+1.17%	-13.3%
DS30	1,932.77	1,908.52	+24.25	+1.27%	-7.7%
DSES	1,183.37	1,169.56	+13.81	+1.18%	-13.3%
CDSET	1,036.90	1,027.87	+9.03	+0.88%	-13.8%

	Advanced	Declined	Unchanged	Total
All Category	286	66	40	392
A Category (Equity)	169	40	24	233
B Category (Equity)	87	9	6	102
N Category (Equity)	4	1	0	5
Z Category (Equity)	26	16	10	52
Mutual Funds	20	6	11	37
Corporate Bonds	2	0	0	2
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,577,506	6,545,855	+0.5%
Mn USD	55,742	55,473	
Turnover			
Mn BDT	4,973	1,594	+212.1%
Mn USD	42	14	
Volume			
Mn Shares	137	43	+216.2%
No. of Trade	116,695	38,391	+204.0%

* Average Interbank Exchange Rate is BDT 118.00 as of Jul 25, 2024

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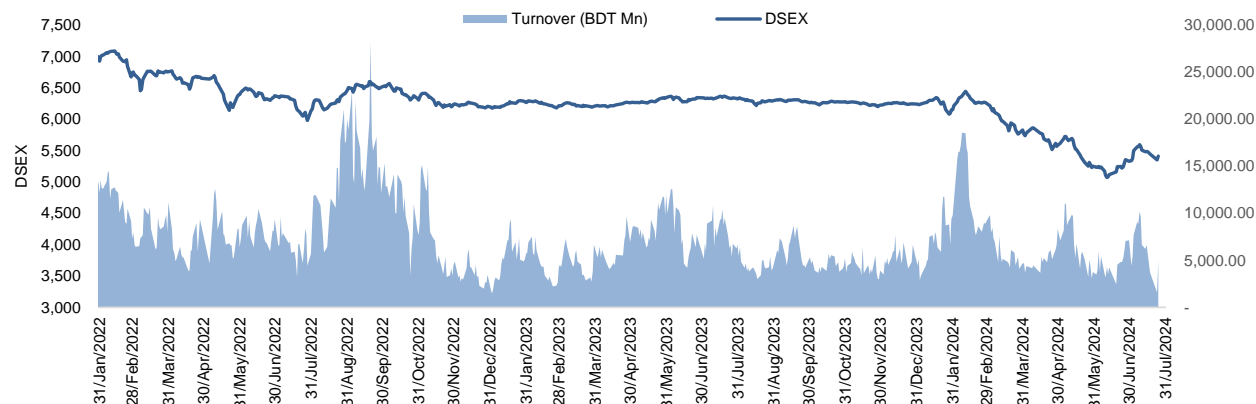


Figure: Sectorial Turnover (BDT Mn)

Day before Yesterday's Turnover Yesterday's Turnover Today's Turnover

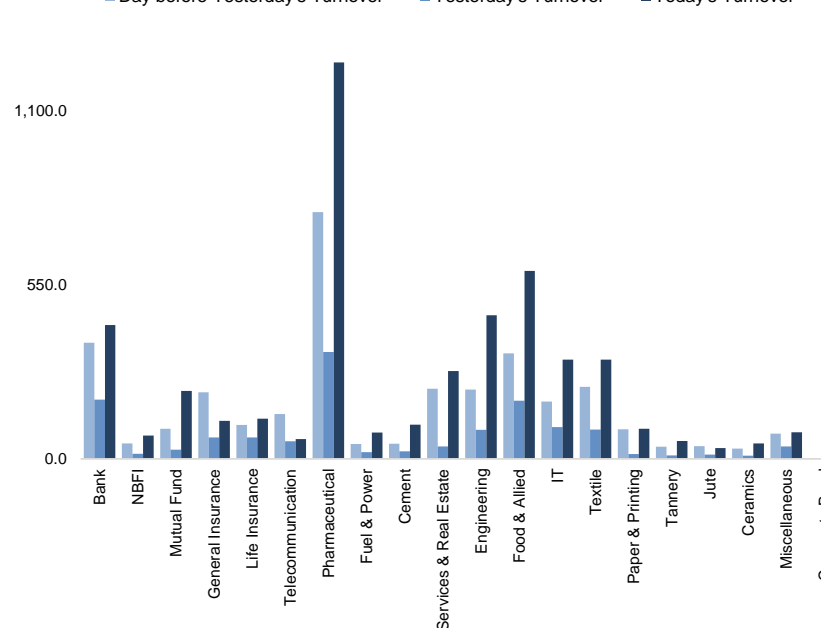
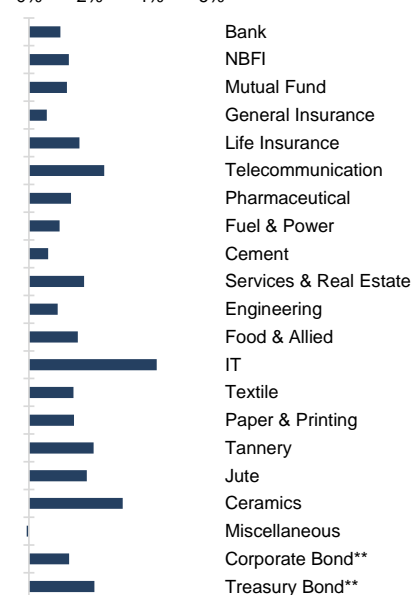


Figure: Sectorial Mcap Change

-2% 0% 2% 4% 6%



Market PE 14.8x

Market PB 1.2x

* 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	1,352	1,338	+13.89	+1.04%	36	647,371	9.8%	423.7	8.9%	7.4x	0.7x	GP	343,111	9.3%	39.3	9.7x	4.8x
NBFI	1,160	1,145	+15.04	+1.31%	23	112,310	1.7%	74.0	1.6%	NM	NM	WALTONHIL	188,846	5.1%	21.9	14.6x	1.7x
Mutual Fund	658	650	+8.10	+1.25%	37	30,729	0.5%	214.8	4.5%	NM	0.6x	SQURPHARMA	188,548	5.1%	350.9	9.3x	1.5x
General Insurance	3,164	3,145	+18.60	+0.59%	43	91,634	1.4%	120.2	2.5%	16.5x	1.4x	BATBC	180,900	4.9%	46.6	10.4x	3.5x
Life Insurance	1,989	1,957	+32.61	+1.67%	15	52,890	0.8%	127.0	2.7%	NM	NM	ROBI	123,615	3.3%	19.2	32.3x	1.8x
Telecommunication	4,191	4,089	+101.45	+2.48%	3	485,229	7.4%	62.3	1.3%	11.8x	3.1x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,226	3,182	+44.07	+1.39%	34	612,081	9.3%	1,254.1	26.4%	16.5x	1.8x	BERGERPBL	85,785	2.3%	11.4	26.4x	6.4x
Fuel & Power	1,212	1,200	+12.10	+1.01%	23	319,145	4.9%	83.6	1.8%	21.0x	0.7x	RENATA	84,290	2.3%	9.1	36.7x	2.6x
Cement	2,288	2,273	+14.35	+0.63%	7	109,250	1.7%	108.2	2.3%	18.2x	2.4x	UPGDCL	75,940	2.1%	2.9	10.1x	2.2x
Services & Real Estate	1,452	1,426	+25.87	+1.81%	9	80,290	1.2%	278.1	5.8%	25.2x	0.6x	MARICO	69,354	1.9%	1.2	15.1x	8.4x
Engineering	3,048	3,020	+28.57	+0.95%	42	352,174	5.4%	454.2	9.6%	14.7x	1.1x	BRACBANK	67,426	1.8%	87.4	7.6x	1.0x
Food & Allied	16,269	16,011	+258.35	+1.61%	21	298,697	4.5%	594.9	12.5%	15.9x	5.0x	ISLAMIBANK	52,486	1.4%	0.0	8.3x	0.7x
IT	2,623	2,517	+105.92	+4.21%	11	34,510	0.5%	313.8	6.6%	28.5x	2.2x	BXPHARMA	50,901	1.4%	9.9	9.5x	1.1x
Textile	1,219	1,201	+17.62	+1.47%	58	126,471	1.9%	314.4	6.6%	NM	0.9x	UNILEVERCL	49,554	1.3%	86.1	57.4x	19.2x
Paper & Printing	6,835	6,734	+100.18	+1.49%	6	31,356	0.5%	95.5	2.0%	44.1x	1.4x	ICB	49,260	1.3%	1.1	NM	1.2x
Tannery	2,412	2,362	+50.26	+2.13%	6	26,421	0.4%	56.3	1.2%	38.0x	2.5x	DUTCHBANGL	42,447	1.1%	6.9	5.3x	0.9x
Jute	17,103	16,783	+320.16	+1.91%	3	4,008	0.1%	34.1	0.7%	NM	NM	EBL	36,398	1.0%	20.9	5.6x	0.8x
Ceramics	503	488	+15.07	+3.09%	5	22,322	0.3%	48.5	1.0%	43.6x	1.4x	POWERGRID	35,456	1.0%	0.4	NM	0.2x
Miscellaneous	4,281	4,284	-3.17	-0.07%	15	233,281	3.5%	84.4	1.8%	39.3x	1.8x	BEACONPHAR	32,225	0.9%	5.0	71.5x	5.3x
Corporate Bond**	6,844	6,755	+89.54	+1.33%	16	41,654	0.6%	0.1	0.0%	NM	NM	BESTHLDNG	29,870	0.8%	18.2	21.7x	0.5x
Treasury Bond**	251	246	+5.30	+2.16%	238	2,865,261	43.6%	11.9	0.2%	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
TECHNODRUG	42.3	+9.9%	0.5	NM	1.4x	SQURPHARMA	117,112	8.6%	9.3x	1.5x	SQURPHARMA	212.7	+0.6%	350.9	9.3x	1.5x
AGNISYSL	32.3	+9.9%	206.7	30.2x	2.0x	BEXIMCO	69,460	5.1%	NM	1.2x	ORIONINFU	523.5	-2.7%	264.8	NM	35.1x
1STPRIMFMF	46.8	+9.9%	36.4	NM	4.4x	BATBC	45,948	3.4%	10.4x	3.5x	LOVELLO	98.5	+1.2%	244.9	71.4x	7.5x
MIDLANDBNK	24.2	+8.5%	38.5	15.0x	1.7x	RENATA	35,002	2.6%	36.7x	2.6x	AGNISYSL	32.3	+9.9%	206.7	30.2x	2.0x
BDCOM	27.8	+8.2%	5.8	36.1x	1.8x	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	SEAPEARL	77.7	-2.9%	200.1	26.1x	4.0x
ZEALBANGLA	109.2	+8.1%	0.3	NM	NM	BXPHARMA	32,479	2.4%	9.5x	1.1x	NRBBANK	12.8	+5.8%	146.7	15.5x	1.0x
EGEN	36.7	+7.0%	33.1	25.0x	2x	BRACBANK	32,157	2.4%	7.6x	1.0x	RANFOUNDRY	175.7	-3.0%	100.2	NM	5.4x
PHARMAID	745.4	+6.6%	47.6	45.8x	6.9x	GP	30,004	2.2%	9.7x	4.8x	BRACBANK	38.1	+0.3%	87.4	7.6x	1.0x
AFTABAUTO	40.6	+6.6%	69.5	NM	0.8x	LHBL	24,690	1.8%	14.3x	3.5x	UNILEVERCL	2,571.0	+0.5%	86.1	57.4x	19.2x
UTTARAFIN	19.0	+6.1%	0.0	NM	0.3x	EBL	24,199	1.8%	5.6x	0.8x	FEKDIL	20.2	+5.8%	76.3	12.9x	1.0x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	PUBALIBANK	20,448	1.5%	3.9x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RANFOUNDRY	175.7	-3.0%	100.2	NM	5.4x	NBL	16,930	1.2%	NM	1.3x	SUNLIFEINS	58.5	58.5	1.0	812	47.52
KBPPWBIL	111.1	-3.0%	1.0	NM	9x	CITYBANK	16,830	1.2%	4.2x	0.7x	AGNISYSL	31.6	30.0	5.0	1,433	43.05
FASFIN	3.3	-2.9%	0.1	NM	NM	BSRMLTD	14,210	1.0%	4.6x	0.6x	ICBSONALI1	10.3	10.3	2.0	4,031	41.52
JUTESPINN	273.0	-2.9%	0.2	NM	NM	ALARABANK	13,534	1.0%	11.1x	1.1x	BRACBANK	38.0	38.0	1.0	500	19.00
SEAPEARL	77.7	-2.9%	200.1	26.1x	4.0x	PRIMEBANK	12,985	1.0%	4.7x	0.7x	RUPALILIFE	176.0	157.1	8.0	86	13.97
PREMIERLEA	3.4	-2.9%	0.2	NM	NM	OLYMPIC	12,616	0.9%	14.9x	2.4x	TITASGAS	21.7	21.7	2.0	365	7.92
UNITEDINS	37.6	-2.8%	1.6	19.4x	1.3x	UTTARABANK	11,350	0.8%	11.9x	0.8x	PREMIERCEM	69.5	69.0	3.0	81	5.59
RUPALILIFE	157.4	-2.8%	43.1	NM	NM	ORIONPHARM	11,317	0.8%	15.9x	0.7x	AMBEEPHA	795.0	795.0	1.0	6	4.77
EASTLAND	24.6	-2.8%	9.3	27.0x	1.2x	ROBI	10,738	0.8%	32.3x	1.8x	LOVELLO	94.4	94.4	3.0	45	4.28
SKTRIMS	21.5	-2.7%	1.5	16.3x	1.3x	* 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					DELTALIFE	82.0	82.0	1.0	49	4.02

* 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	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SUNLIFEINS	58.5	58.5	47.5	812	1
AGNISYSL	31.6	30.0	43.0	1,433	5
ICBSONALI1	10.3	10.3	41.5	4,031	2
BRACBANK	38.0	38.0	19.0	500	1
RUPALILIFE	176.0	157.1	14.0	86	8
TITASGAS	21.7	21.7	7.9	365	2
PREMIERCEM	69.5	69.0	5.6	81	3
AMBEEPHA	795.0	795.0	4.8	6	1
LOVELLO	94.4	94.4	4.3	45	3
DELTALIFE	82.0	82.0	4.0	49	1
PEOPLESINS	40.0	40.0	4.0	100	1
RELIANCE1	21.3	19.3	4.0	196	2
NRBBANK	12.1	11.8	3.9	330	4
EMERALDOIL	47.0	47.0	3.1	66	1
ORIONINFU	533.2	533.1	1.6	3	2
BEACHHATCH	83.8	83.8	1.6	19	1
MALEKSPIN	33.9	30.1	1.4	45	2
MALEKSPIN	33.9	30.1	1.4	45	2
MPETROLEUM	179.1	179.1	0.9	5	1
QUASEMIND	35.0	35.0	0.7	20	1
KOHINOOR	640.2	640.2	0.6	1	1
ANWARGALV	121.7	121.7	0.6	5	1
Total			219.2		53

Important DSE News

SHAHJABANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.50 for April-June 2024 as against Tk. 1.50 for April-June 2023; Consolidated EPS was Tk. 2.59 for January-June 2024 as against Tk. 2.45 for January-June 2023; Consolidated NOCFPS was Tk. 12.48 for January-June 2024 as against Tk. 6.48 for January-June 2023. Consolidated NAV per share was Tk. 22.36 as on June 30, 2024 and Tk. 20.82 as on June 30, 2023

EASTLAND

(Q2 Un-audited): EPS was Tk. 0.27 for April-June 2024 as against Tk. 0.41 for April-June 2023; EPS was Tk. 0.55 for January-June 2024 as against Tk. 0.78 for January-June 2023. NOCFPS was Tk. 0.35 for January-June 2024 as against Tk. 0.62 for January-June 2023. NAV per share (investment shown at fair value) was Tk. 20.85 as on June 30, 2024 and Tk. 21.11 as on June 30, 2023.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
GP		0.0%	160%	Record Date	13-Aug-24

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