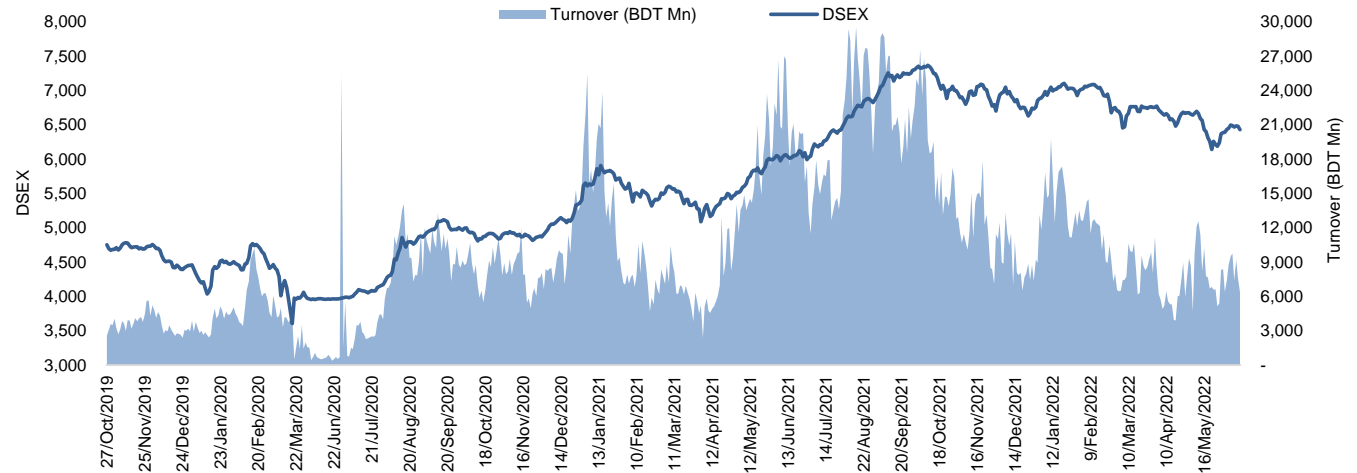


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.75%) lost 48.84 points and closed at 6,431.46. The blue-chip index DS30 (-0.75%), the Shariah-based index DSES (-0.75%), and the large-cap index CDSET (-0.64%) closed at 2,334.65, 1,403.08, and 1,279.81 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 0.90% followed by Pharmaceutical (-0.72%), Food & Allied (-0.68%), Fuel & Power (-0.62%), Bank (-0.58%), NBFi (-0.33%), and Telecommunication (+0.05%), respectively. Block trades contributed 1.7% of the overall market turnover. Shinepukur Ceramics Limited (+9.5%) was the most traded share with a turnover of BDT 398 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,431.46	6,480.30	-48.84	-0.75%	-4.8%
DS30	2,334.65	2,352.38	-17.74	-0.75%	-7.8%
DSES	1,403.08	1,413.74	-10.67	-0.75%	-2.0%
CDSET	1,279.81	1,288.03	-8.22	-0.64%	-5.8%

	Advanced	Declined	Unchanged	Total
All Category	53	306	19	378
A Category (Equity)	26	222	11	259
B Category (Equity)	18	67	4	89
N Category (Equity)	1	6	0	7
Z Category (Equity)	8	11	4	23
Mutual Funds	0	30	3	33
Corporate Bonds	3	0	1	4

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,201,053	5,228,818	-0.5%
	Mn USD	60,477	60,800	-0.5%
Turnover	Mn BDT	6,364	7,583	-16.1%
	Mn USD	74	88	-16.1%
Volume	Mn Shares	176	195	-9.8%
No. of Trade		136,251	149,850	-9.1%

Figure: Sectorial Turnover (BDT)

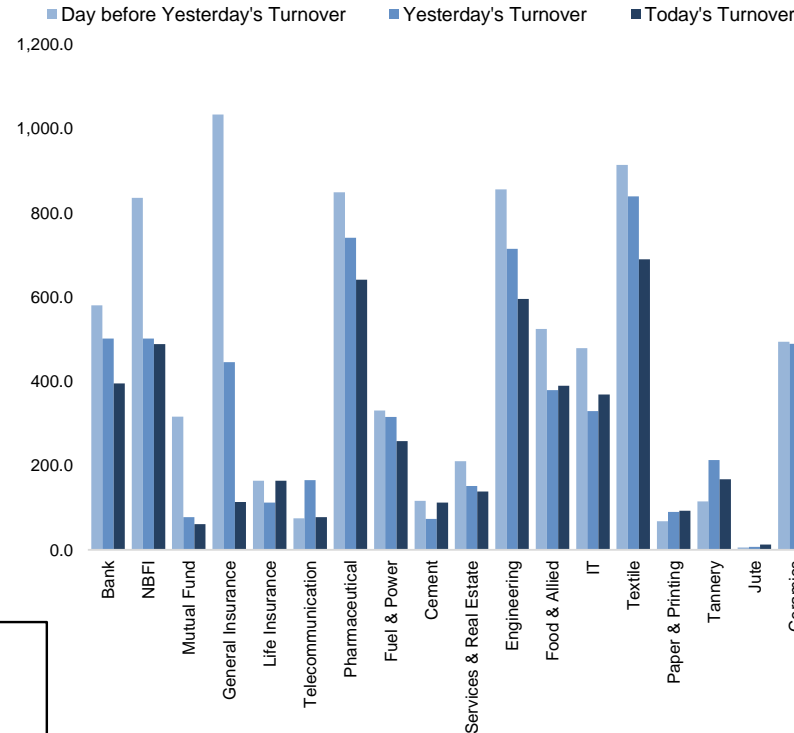
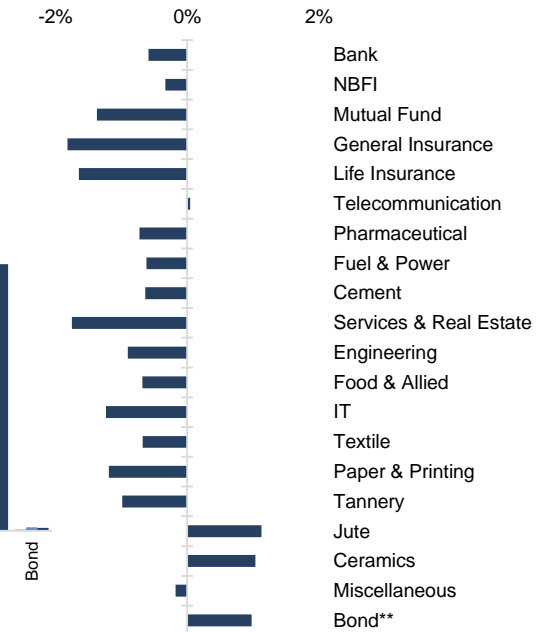


Figure: Sectorial Mcap Change



Market PE 15.9x  
Market PB 1.7x

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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	1,432	1,440	-8.42	-0.58%	33	657,979	14.4%	395.3	6.7%	7.8x	0.8x	GP	415,352	9.1%	9.3	12.5x	7.2x
NBFI	2,015	2,022	-6.65	-0.33%	23	198,250	4.3%	488.9	8.2%	NM	3.6x	WALTONHIL	329,889	7.2%	5.9	23.1x	3.4x
Mutual Fund	893	906	-12.42	-1.37%	36	39,531	0.9%	61.3	1.0%	NM	0.8x	BATBC	298,998	6.6%	36.4	19.6x	9.1x
General Insurance	3,676	3,744	-68.03	-1.82%	41	108,474	2.4%	113.3	1.9%	17.2x	1.8x	SQURPHARMA	191,207	4.2%	61.8	10.3x	1.9x
Life Insurance	2,368	2,408	-39.59	-1.64%	13	66,514	1.5%	164.0	2.8%	NM	NM	ROBI	153,995	3.4%	21.1	84.0x	2.3x
Telecommunication	5,134	5,132	+2.34	+0.05%	3	605,280	13.3%	77.8	1.3%	16.2x	4.5x	UPGDCL	145,504	3.2%	6.0	11.8x	4.4x
Pharmaceutical	3,800	3,827	-27.66	-0.72%	32	713,277	15.6%	641.7	10.8%	17.6x	2.5x	RENATA	142,685	3.1%	10.1	25.8x	5.0x
Fuel & Power	1,791	1,802	-11.13	-0.62%	23	467,363	10.2%	258.1	4.3%	11.6x	1.2x	BEXIMCO	115,586	2.5%	287.3	8.0x	1.5x
Cement	2,493	2,509	-15.96	-0.64%	7	122,067	2.7%	112.1	1.9%	25.9x	2.6x	LHBL	84,083	1.8%	74.9	22.2x	4.8x
Services & Real Estate	1,423	1,448	-25.36	-1.75%	8	54,080	1.2%	138.4	2.3%	88.4x	1.0x	BERGERPBL	80,902	1.8%	1.1	27.8x	7.7x
Engineering	4,692	4,735	-42.60	-0.90%	42	548,644	12.0%	595.7	10.0%	19.0x	1.9x	ICB	80,259	1.8%	2.4	45.4x	1.8x
Food & Allied	22,362	22,515	-152.87	-0.68%	21	397,559	8.7%	390.0	6.6%	24.1x	9.3x	MARICO	75,650	1.7%	21.9	21.3x	28.1x
IT	2,753	2,787	-34.37	-1.23%	11	34,839	0.8%	369.1	6.2%	28.3x	2.4x	BXPBARMA	70,932	1.6%	38.2	12.4x	1.8x
Textile	1,562	1,572	-10.61	-0.67%	58	168,763	3.7%	689.6	11.6%	24.0x	1.0x	BEACONPHAR	64,218	1.4%	26.6	68.6x	11.0x
Paper & Printing	7,453	7,542	-89.59	-1.19%	6	26,666	0.6%	92.9	1.6%	NM	1.8x	BRACBANK	59,167	1.3%	41.5	11.1x	1.1x
Tannery	3,489	3,524	-34.64	-0.98%	6	37,242	0.8%	167.5	2.8%	52.6x	3.7x	ISLAMIBANK	51,842	1.1%	4.0	10.5x	0.8x
Jute	8,670	8,573	+96.73	+1.13%	3	1,995	0.0%	12.6	0.2%	NM	28.2x	DUTCHBANGL	40,670	0.9%	9.0	7.0x	1.1x
Ceramics	759	751	+7.78	+1.03%	5	34,194	0.7%	534.7	9.0%	32.1x	2.0x	SUMITPOWER	39,832	0.9%	10.6	9.5x	1.1x
Miscellaneous	4,417	4,424	-7.84	-0.18%	15	245,280	5.4%	632.9	10.6%	12.1x	2.1x	POWERGRID	39,628	0.9%	22.7	10.8x	0.4x
Bond**	93	92	+0.90	+0.98%	8	34,662	0.8%	7.2	0.1%	NM	NM	TITASGAS	37,986	0.8%	12.5	11.4x	0.5x

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
MEGHNAINS	13.3	+9.9%	0.0	18.3x	0.9x	SQURPHARMA	125,107	7.3%	10.3x	1.9x	SPCERAMICS	45.0	+9.5%	398.3	NM	1.4x
MONNOFABR	22.6	+9.7%	51.4	NM	0.9x	BATBC	79,085	4.6%	19.6x	9.1x	BEXIMCO	131.9	-0.5%	287.3	8.0x	1.5x
DULAMIACOT	71.9	+9.6%	7.1	NM	NM	BEXIMCO	77,038	4.5%	8.0x	1.5x	BDCOM	37.2	-1.6%	202.5	24.8x	2.4x
SPCERAMICS	45.0	+9.5%	398.3	NM	1.4x	RENATA	69,530	4.0%	25.8x	5.0x	IPDC	55.1	+1.8%	174.0	22.8x	3.1x
SHURWID	21.1	+7.1%	38.2	9.6x	1.6x	BXPBARMA	49,525	2.9%	12.4x	1.8x	BSC	118.1	+3.2%	150.7	8.8x	1.7x
MEGCONMILK	23.4	+6.8%	7.1	NM	NM	BEACONPHAR	44,953	2.6%	68.6x	11.0x	FORTUNE	106.0	-1.7%	142.4	34.2x	7.0x
ISNLTD	46.5	+6.7%	21.0	NM	16.0x	GP	41,535	2.4%	12.5x	7.2x	BDFINANCE	49.9	-0.6%	98.5	36.0x	2.7x
NFML	19.8	+5.9%	63.5	NM	1.7x	BRACBANK	31,808	1.9%	11.1x	1.1x	FUWANGFOOC	22.3	-1.8%	94.7	NM	1.9x
SALAMCRST	34.0	+5.3%	56.3	85.0x	1.8x	LHBL	29,698	1.7%	22.2x	4.8x	SALVOCHEM	66.0	-1.2%	94.3	27.4x	4.4x
EASTRNLAB	2,016.9	+5.0%	27.0	NM	11.1x	ISLAMIBANK	25,237	1.5%	10.5x	0.8x	NBL	8.3	+1.2%	90.6	NM	0.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)	
SAPORTL	29.4	-2.0%	9.0	36.0x	0.9x	PUBALIBANK	18,173	1.1%	5.8x	0.6x	ISLAMIBANK	32.5	32.4	4.0	2,016	65.30
GREENDEL	78.7	-2.0%	4.3	9.3x	1.1x	CITYBANK	16,878	1.0%	4.7x	0.8x	PEOPLESINS	57.0	56.8	15.0	1,029	58.61
NITOLINS	49.3	-2.0%	0.1	16.8x	1.7x	ALARABANK	15,847	0.9%	11.7x	1.2x	PRIMEINSUR	86.6	86.5	15.0	672	58.16
RENWICKJA	1,104.6	-2.0%	0.4	NM	NM	BSRMLTD	15,827	0.9%	5.4x	0.7x	AL-HAJTEX	99.7	98.8	17.0	390	38.60
JANATAINS	39.5	-2.0%	6.8	33.2x	2.7x	OLYMPIC	15,798	0.9%	15.0x	2.8x	BDCOM	37.9	37.7	2.0	825	31.18
BGIC	49.4	-2.0%	2.9	25.6x	2.5x	ROBI	15,400	0.9%	84.0x	2.3x	BEXIMCO	144.3	135.9	3.0	214	30.81
UNITEDINS	49.4	-2.0%	0.9	29.4x	1.4x	SUMITPOWER	14,654	0.9%	9.5x	1.1x	IPDC	54.2	53.8	3.0	389	21.05
PRAGATIINS	69.3	-2.0%	3.8	12.1x	1.2x	UPGDCL	14,550	0.8%	11.8x	4.4x	IMAMBUTTON	87.0	87.0	2.0	200	17.40
EHL	59.5	-2.0%	41.2	12.8x	0.8x					HRTEX	82.9	82.5	12.0	173	14.29	
BEACHHATCH	39.7	-2.0%	17.8	NM	4.1x					BEACONPHAR	280.0	276.0	3.0	50	13.81	

\*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
ISLAMIBANK	32.5	32.4	65.3	2,016	4
PEOPLESINS	57.0	56.8	58.6	1,029	15
PRIMEINSUR	86.6	86.5	58.2	672	15
AL-HAJTEX	99.7	98.8	38.6	390	17
BDCOM	37.9	37.7	31.2	825	2
BEXIMCO	144.3	135.9	30.8	214	3
IPDC	54.2	53.8	21.1	389	3
IMAMBUTTON	87.0	87.0	17.4	200	2
HRTEX	82.9	82.5	14.3	173	12
BEACONPHAR	280.0	276.0	13.8	50	3
EBL	33.0	33.0	12.9	392	2
RUPALILIFE	70.0	70.0	10.5	150	1
WALTONHIL	1,130.0	1,130.0	6.8	6	3
SONALIPAPR	560.0	560.0	6.4	12	1
BXPHERMA	159.5	159.5	6.4	40	2
RUNNERAUTO	52.0	52.0	5.2	100	2
SPCERAMICS	43.0	40.3	4.7	113	5
SHEPHERD	27.0	27.0	3.0	111	1
VFSTDL	25.6	25.6	2.1	83	2
DELTALIFE	128.6	128.6	1.5	12	1
RDFOOD	49.2	49.2	1.5	30	1
GSPFINANCE	33.5	33.5	1.4	41	2
<b>Total</b>			<b>421.2</b>		<b>111</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
One Bank Limited	-	5.0%	0.0%	Record Date	13-Jun-22
Indo-Bangla Pharmaceuticals Limited	-	3.0%	0.0%	Record Date	13-Jun-22
National Bank Ltd.	-	0.0%	0.0%	Record Date	16-Jun-22
Islami Insurance Bangladesh Limited	-	0.0%	12.5%	Record Date	20-Jun-22
Beximco Green Sukuk Al Istisna'a	-	0.0%	5.8%	Record Date	22-Jun-22
Marico Bangladesh Limited	-	0.0%	450.0%	Record Date	23-Jun-22
Berger Paints Bangladesh Ltd.	-	0.0%	100.0%	Record Date	26-Jun-22
Premier Bank Perpetual Bond	-	0.0%	10.0%	Record Date	26-Jun-22
MIDAS Financing Ltd.	-	1.0%	1.0%	Record Date	29-Jun-22
Janata Insurance Company Ltd.	-	5.0%	6.0%	Record Date	7-Jul-22
Prime Insurance Company Ltd.	-	0.0%	15.0%	Record Date	12-Jul-22
Union Insurance Company Limited	-	0.0%	5.0%	Record Date	20-Jul-22
Kay & Que (Bangladesh) Ltd.	-	0.0%	5.0%	Record Date	Notify later

**Important DSE News**
**BDFINANCE**

The Company has informed that it has credited bonus share to the respective shareholders' BO Accounts and disbursed the cash dividend to the respective shareholders for the year ended December 31, 2021.

**ABBANK**

Extension of public offer subscription portion of perpetual bond of AB Bank Limited up to August 22, 2022: BSEC has extended the consent validity and subscription period of public offer portion of BDT 60.00 crore of transferrable, unsecured, non-cumulative, contingent-convertible perpetual bond of AB Bank Limited up to August 22, 2022.

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