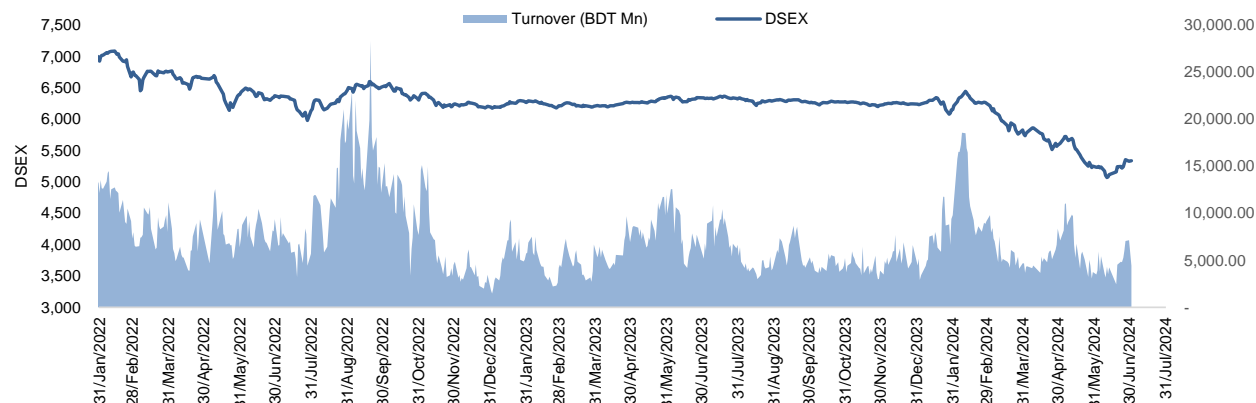


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.22%) gained 11.79 points and closed at 5,340.19. The blue-chip index DS30 (-0.26%), the Shariah-based index DSES (-0.19%), and the large-cap index CDSET (-0.37%) closed at 1,904.63, 1,177.74, and 1,036.15 points, respectively. Most of the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 0.88% followed by Food & Allied (-0.81%), NBF1 (-0.69%), Pharmaceutical (-0.55%), Fuel & Power (-0.34%), Bank (-0.05%), and Engineering (+0.46%), respectively. Block trades contributed 8.5% of the overall market turnover. Beach Hatchery Ltd. (+3.2%) was the most traded share with a turnover of BDT 197 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,340.19	5,328.40	+11.79	+0.22%	-14.5%
DS30	1,904.63	1,909.64	-5.01	-0.26%	-9.0%
DSES	1,177.74	1,180.01	-2.27	-0.19%	-13.7%
CDSET	1,036.15	1,040.03	-3.88	-0.37%	-13.9%

	Advanced	Declined	Unchanged	Total
All Category	213	125	56	394
A Category (Equity)	124	78	32	234
B Category (Equity)	59	31	12	102
N Category (Equity)	2	1	1	4
Z Category (Equity)	28	15	11	54
Mutual Funds	9	13	15	37
Corporate Bonds	0	2	0	2
Treasury Bonds	0	1	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,605,406	6,621,559	-0.2%
	Mn USD	55,978	56,115	
Turnover	Mn BDT	4,406	7,127	-38.2%
	Mn USD	37	60	
Volume	Mn Shares	126	146	-13.3%
No. of Trade		143,838	137,005	+5.0%

\* Average Interbank Exchange Rate is BDT 118.00 as of Jul 02, 2024

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Figure: Sectorial Turnover (BDT Mn)

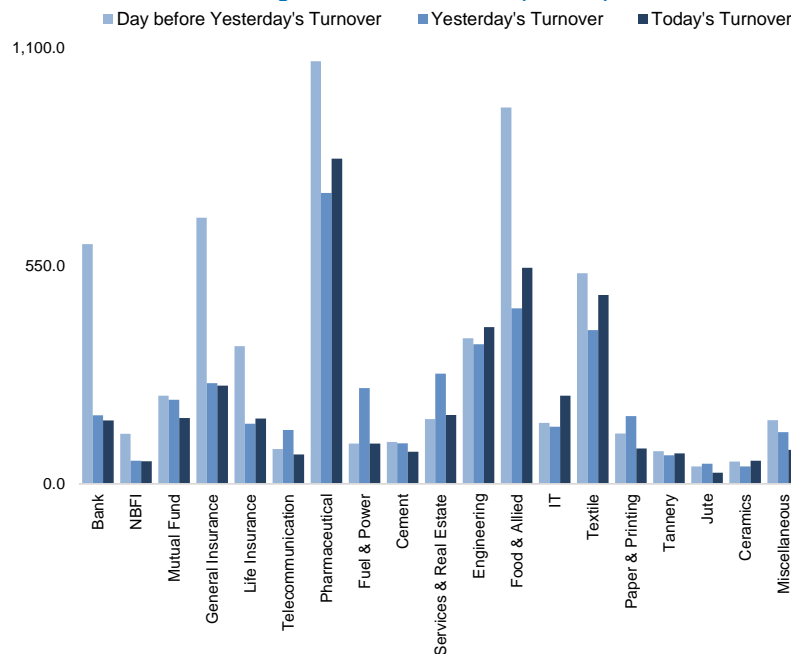
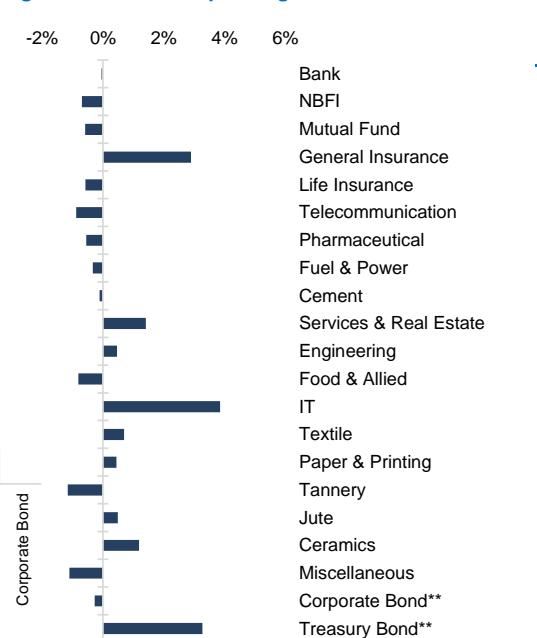


Figure: Sectorial Mcap Change



Market PE 14.4x  
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	1,286	1,286	-0.61	-0.05%	36	614,591	9.3%	159.7	4.0%	7.1x	0.6x	GP	329,473	9.0%	39.8	8.5x	4.1x
NBFI	1,122	1,130	-7.85	-0.69%	23	108,651	1.6%	57.3	1.4%	NM	NM	WALTONHIL	196,419	5.4%	36.7	15.2x	1.8x
Mutual Fund	665	669	-3.92	-0.59%	37	31,056	0.5%	166.3	4.1%	NM	0.6x	SQRPHARMA	185,002	5.1%	98.7	9.1x	1.5x
General Insurance	3,093	3,006	+87.15	+2.90%	43	89,594	1.4%	247.8	6.1%	16.2x	1.4x	BATBC	173,070	4.7%	77.6	9.9x	3.3x
Life Insurance	2,046	2,058	-11.90	-0.58%	15	54,390	0.8%	164.7	4.1%	NM	NM	ROBI	123,091	3.4%	26.4	32.2x	1.8x
Telecommunication	4,082	4,119	-36.38	-0.88%	3	472,667	7.2%	73.9	1.8%	10.6x	2.9x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,168	3,185	-17.53	-0.55%	33	604,493	9.2%	820.2	20.3%	16.3x	1.8x	RENATA	86,779	2.4%	17.6	37.8x	2.7x
Fuel & Power	1,245	1,249	-4.20	-0.34%	23	327,783	5.0%	101.8	2.5%	21.5x	0.7x	BERGERPBL	83,248	2.3%	1.0	25.6x	6.2x
Cement	2,319	2,321	-2.54	-0.11%	7	110,730	1.7%	81.1	2.0%	16.0x	2.2x	UPGDCL	80,578	2.2%	6.8	10.8x	2.4x
Services & Real Estate	1,514	1,493	+21.07	+1.41%	9	83,689	1.3%	173.5	4.3%	26.2x	0.6x	LHBL	71,889	2.0%	21.6	12.7x	3.0x
Engineering	3,107	3,093	+14.34	+0.46%	42	358,953	5.4%	395.2	9.8%	15.0x	1.1x	BRACBANK	61,055	1.7%	51.9	6.9x	0.9x
Food & Allied	15,975	16,105	-129.85	-0.81%	21	293,295	4.4%	544.5	13.5%	15.6x	4.9x	BXPHARMA	53,980	1.5%	56.2	10.1x	1.2x
IT	2,611	2,514	+96.85	+3.85%	11	34,350	0.5%	222.4	5.5%	28.3x	2.2x	UNILEVERCL	52,848	1.4%	1.2	61.2x	20.5x
Textile	1,221	1,213	+8.42	+0.69%	58	126,694	1.9%	476.0	11.8%	NM	0.9x	ISLAMIBANK	52,486	1.4%	0.0	8.3x	0.7x
Paper & Printing	6,888	6,858	+30.36	+0.44%	6	31,603	0.5%	89.0	2.2%	44.4x	1.4x	ICB	50,648	1.4%	5.5	NM	1.2x
Tannery	2,402	2,430	-28.11	-1.16%	6	26,309	0.4%	76.8	1.9%	37.9x	2.5x	DUTCHBANGL	41,217	1.1%	6.7	5.1x	0.8x
Jute	15,542	15,466	+75.40	+0.49%	3	3,642	0.1%	28.3	0.7%	NM	NM	BEACONPHAR	35,643	1.0%	13.3	79.1x	5.8x
Ceramics	502	496	+5.88	+1.18%	5	22,303	0.3%	58.4	1.4%	43.6x	1.4x	POWERGRID	35,547	1.0%	0.9	NM	0.2x
Miscellaneous	4,192	4,238	-46.66	-1.10%	15	228,397	3.5%	85.4	2.1%	38.5x	1.8x	EBL	35,312	1.0%	1.7	5.4x	0.8x
Corporate Bond**	6,262	6,279	-16.77	-0.27%	16	42,034	0.6%	0.1	0.0%	NM	NM	BESTHLDNG	30,294	0.8%	30.0	22.0x	0.5x
Treasury Bond**	182	176	+5.77	+3.28%	240	2,939,753	44.5%	9.4	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
AFTABAUTO	33.0	+10.0%	33.6	NM	0.7x	SQRPHARMA	117,112	8.6%	9.1x	1.5x	BEACHHATCH	78.1	+3.2%	197.1	40.5x	6.2x
NAVANACNG	23.6	+9.8%	7.6	NM	0.8x	BEXIMCO	69,460	5.1%	NM	1.2x	SALVOCHEM	43.7	+4.5%	149.4	21.4x	2.6x
CONTININS	30.6	+9.7%	18.9	19.7x	1.4x	BATBC	45,948	3.4%	9.9x	3.3x	AIL	113.4	+4.3%	123.2	45.9x	4.7x
CENTRALINS	50.9	+9.0%	20.6	25.3x	1.0x	RENATA	35,002	2.6%	37.8x	2.7x	ASIATICLAB	50.8	+2.0%	122.0	NM	1.0x
DGIC	29.0	+8.6%	5.0	31.5x	2.4x	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	MALEKSPIN	33.4	+7.1%	99.8	5.8x	0.6x
ZAHINTEX	6.5	+8.3%	1.6	NM	0.9x	BXPHARMA	32,479	2.4%	10.1x	1.2x	SQRPHARMA	208.7	-1.0%	98.7	9.1x	1.5x
MEGHNAINS	30.5	+7.4%	7.9	27.5x	2x	BRACBANK	32,157	2.4%	6.9x	0.9x	BATBC	320.5	-0.7%	77.6	9.9x	3.3x
GOLDENSON	18.2	+7.1%	49.6	NM	1.0x	GP	30,004	2.2%	8.5x	4.1x	ICBSONALI1	10.0	+1.0%	74.0	NM	1.5x
MALEKSPIN	33.4	+7.1%	99.8	5.8x	0.6x	LHBL	24,690	1.8%	12.7x	3.0x	FEKDIL	19.2	+3.8%	64.6	12.3x	1.0x
KPPL	21.3	+7.0%	9.5	NM	NM	EBL	24,199	1.8%	5.4x	0.8x	GEMINISEA	254.4	+5.8%	63.8	36.0x	11.6x
						PUBALIBANK	20,448	1.5%	4.0x	0.6x						
						NBL	16,930	1.2%	NM	1.2x						
						CITYBANK	16,830	1.2%	3.8x	0.6x						
						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%	9.7x	0.6x						
						ORIONPHARM	11,317	0.8%	16.1x	0.8x						
						ROBI	10,738	0.8%	32.2x	1.8x						
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)
ISLAMICFIN	8.5	-5.6%	2.2	NM	0.8x						PRAGATILIF	154.5	137.8	11.0	504	70.68
BIFC	9.0	-3.2%	0.8	NM	NM						EIL	42.3	42.3	2.0	801	33.89
PRAGATILIF	136.0	-3.2%	52.4	NM	NM						LOVELLO	87.0	85.0	3.0	367	31.90
UNILEVERCL	2,741.9	-3.0%	1.2	61.2x	20.5x						BRACBANK	34.4	34.3	2.0	919	31.58
STYLECRAFT	58.3	-3.0%	2.9	NM	6.3x						CENTRALINS	50.0	45.9	4.0	597	29.01
MONOSPOOL	181.4	-3.0%	0.9	48.8x	4.3x						SEAPEARL	89.0	89.0	2.0	200	17.80
PAPERPROC	150.1	-3.0%	4.4	52.1x	2.1x						MEGHNAINS	31.0	29.5	6.0	455	13.70
UNITEDFIN	9.8	-3.0%	1.2	13.2x	0.6x						BXPHARMA	118.1	118.1	2.0	100	11.81
HEIDELCEM	235.5	-3.0%	9.2	28.6x	3.2x						RELIANCE1	19.6	18.6	8.0	615	11.66
CAPITECGBF	16.4	-3.0%	3.0	NM	1.7x						ADNTEL	100.0	96.5	6.0	103	9.99

\* 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
PRAGATILIF	154.5	137.8	70.7	504	11
EIL	42.3	42.3	33.9	801	2
LOVELLO	87.0	85.0	31.9	367	3
BRACBANK	34.4	34.3	31.6	919	2
CENTRALINS	50.0	45.9	29.0	597	4
SEAPEARL	89.0	89.0	17.8	200	2
MEGHNAINS	31.0	29.5	13.7	455	6
BXPHARMA	118.1	118.1	11.8	100	2
RELIANCE1	19.6	18.6	11.7	615	8
ADNTEL	100.0	96.5	10.0	103	6
MEGHNACEM	78.6	78.3	7.5	96	6
PRIMEINSUR	36.0	36.0	7.2	200	2
BEACHHATCH	75.7	75.3	6.9	91	2
CAPITECGBF	17.0	16.4	5.7	348	6
AIL	115.0	107.0	5.6	50	4
JHRML	68.6	68.6	5.5	80	2
BEXIMCO	104.1	104.1	4.8	46	6
MALEKSPIN	34.2	34.0	4.6	136	2
SUNLIFEINS	46.0	46.0	4.6	100	2
SIMTEX	22.9	22.5	4.5	200	2
RUPALILIFE	204.2	191.0	4.4	22	3
PTL	78.0	78.0	4.3	55	1
<b>Total</b>			<b>374.4</b>		<b>120</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
DELTALIFE		0.0%	30%	Record Date	8-Jul-24
BDFINANCE		0.0%	0%	Record Date	8-Jul-24
LINDEBD		0.0%	1540%	Record Date	9-Jul-24
DGIC		0.0%	5%	Record Date	15-Jul-24
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

#### Important DSE News

##### ISLAMICFIN

The Board of Directors has recommended No Dividend for the year ended December 31, 2023. Date of AGM: 22.08.2024, Time: 11:00 AM, System of holding AGM: Hybrid System. Venue: Will be notified through AGM notice. Record Date: 28.07.2024. The Company has also reported EPS of Tk. (1.64), NAV per share of Tk. 12.42 and NOCFPS of Tk. (0.38) for the year ended December 31, 2023 as against Tk. 0.30, Tk. 14.56 and Tk. (16.92) respectively for the year ended December 31, 2022.

**(Q1 Un-audited):** EPS was Tk. (1.62) for January-March 2024 as against Tk. 0.06 for January-March 2023. NOCFPS was Tk. (0.71) for January-March 2024 as against Tk. (1.83) for January-March 2023. NAV per share was Tk. 10.80 as on March 31, 2024 and Tk. 12.42 as on December 31, 2023.

##### SUNLIFEINS

The Board of Directors has recommended 0.5% cash dividend for the year ended December 31, 2023. Date of AGM: 20.08.2024, Time: 11:00 AM, Mode of AGM: Hybrid Platform. Venue: RAOVA Convention Hall, Mohakhali. Record Date: 23.07.2024.

##### PRAGATILIF

The Board of Directors has recommended 14% cash dividend for the year ended December 31, 2023. Date of AGM: 22.08.2024, Time: 12:30 PM, Venue: Digital Platform. Record Date: 23.07.2024.

##### BIFC

The Board of Directors has recommended No Dividend for the year ended December 31, 2022. Date, Time and Venue of AGM: To be notified later. Record Date: 12.08.2024. The Company has also reported EPS of Tk. (7.58), NAV per share of Tk. (114.42) and NOCFPS of Tk. (2.11) for the year ended December 31, 2022 as against Tk. (9.78), Tk. (106.83) and Tk. (2.64) respectively for the year ended December 31, 2021.

**(Q1 Un-audited):** EPS was Tk. (1.47) for January-March, 2023 as against Tk. (1.61) for January-March, 2022; NOCFPS was Tk. (1.20) for January-March, 2023 as against Tk. 0.09 for January-March, 2022. NAV per share was Tk. (115.89) as on March 31, 2023 and Tk. (108.44) as on March 31, 2022.

**(Q2 Un-audited):** EPS was Tk. (0.90) for April-June 2023 as against Tk. (1.77) for April-June 2022; EPS was Tk. (2.37) for January-June 2023 as against Tk. (3.38) for January-June 2022. NOCFPS was Tk. (2.20) for January-June 2023 as against Tk. (0.59) for January-June 2022. NAV per share was Tk. (116.79) as on June 30, 2023 and Tk. (110.22) as on June 30, 2022.

**(Q3 Un-audited):** EPS was Tk. (1.07) for July-September, 2023 as against Tk. (1.70) for July-September, 2022; EPS was Tk. (3.44) for January-September, 2023 as against Tk. (5.08) for January-September, 2022. NOCFPS was Tk. (3.09) for January-September, 2023 as against Tk. (1.39) for January-September, 2022. NAV per share was Tk. (117.85) as on September 30, 2023 and Tk. (111.92) as on September 30, 2022.

##### PAPERPROC

**(Q3 Un-audited):** Basic EPS was Tk. 1.40 for January-March 2024 as against Tk. 1.25 for January-March 2023; Basic EPS was Tk. 2.26 for July 2023-March 2024 as against Tk. 3.04 for July 2022-March 2023. Diluted EPS was Tk. 1.40 for January-March 2024 as against Tk. 0.44 for January-March 2023; Diluted EPS was Tk. 2.26 for July 2023-March 2024 as against Tk. 1.07 for July 2022-March 2023. Basic NOCFPS was Tk. (2.85) for July 2023-March 2024 as against Tk. (5.08) for July 2022-March 2023. Basic NAV per share was Tk. 72.33 (after merger) as on March 31, 2024 and Tk. 35.50 as on June 30, 2023. Diluted NAV per share was Tk. 72.33 (after merger) as on March 31, 2024 and Tk. 12.53 as on June 30, 2023.

##### MONOSPOOL

**(Q3 Un-audited):** Basic EPS was Tk. 1.50 for January-March 2024 as against Tk. 1.65 for January-March 2023; Basic EPS was Tk. 2.71 for July 2023-March 2024 as against Tk. 4.79 for July 2022-March 2023. Diluted EPS was Tk. 1.50 for January-March 2024 as against Tk. 0.45 for January-March 2023; Diluted EPS was Tk. 2.71 for July 2023-March 2024 as against Tk. 1.32 for July 2022-March 2023. Basic NOCFPS was Tk. 5.18 for July 2023-March 2024 as against Tk. (21.57) for July 2022-March 2023. Basic NAV per share was Tk. 42.21 (after merger) as on March 31, 2024 and Tk. 52.17 as on June 30, 2023. Diluted NAV per share was Tk. 42.21 (after merger) as on March 31, 2024 and Tk. 14.36 as on June 30, 2023.

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