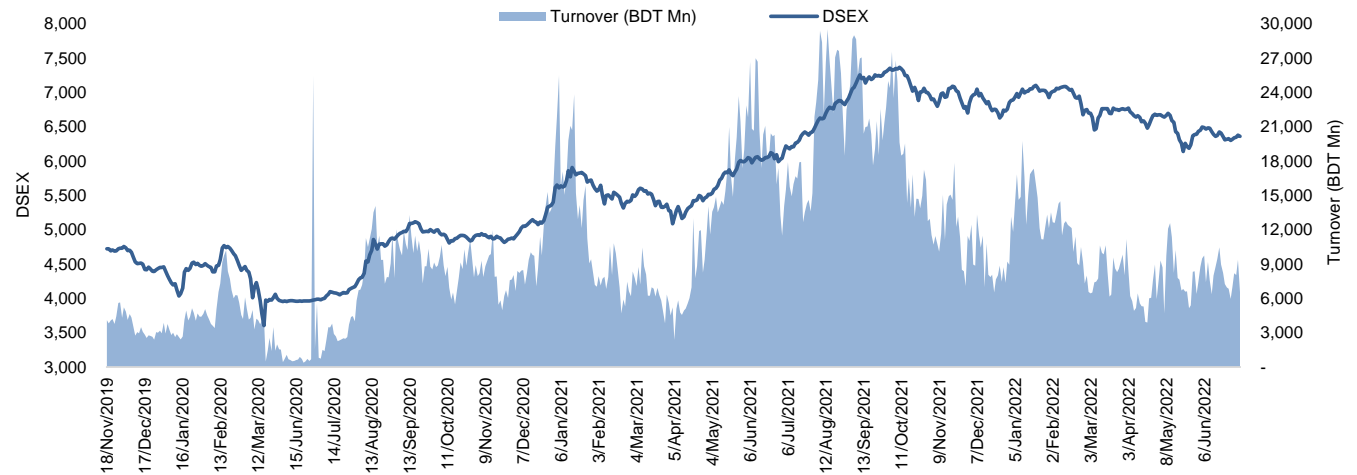


**Daily Market Update**

The market closed in red today. The benchmark index DSEX (-0.27%) lost 17.17 points and closed at 6,359.78. The blue-chip index DS30 (-0.19%), the Shariah-based index DSES (-0.15%), and the large-cap index CDSET (-0.28%) closed at 2,291.21, 1,384.75, and 1,259.49 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.82% followed by Engineering (-0.76%), Pharmaceutical (-0.65%), Fuel & Power (-0.35%), NBFi (-0.26%), Food & Allied (-0.11%), and Telecommunication (+1.49%), respectively. Block trades contributed 1.6% of the overall market turnover. Intraco Refueling Station Limited (+7.6%) was the most traded share with a turnover of BDT 363 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,359.78	6,376.94	-17.17	-0.27%	-5.9%
DS30	2,291.21	2,295.59	-4.38	-0.19%	-9.5%
DSES	1,384.75	1,386.78	-2.03	-0.15%	-3.2%
CDSET	1,259.49	1,263.08	-3.59	-0.28%	-7.3%

	Advanced	Declined	Unchanged	Total
All Category	120	219	43	382
A Category (Equity)	78	153	32	263
B Category (Equity)	26	57	6	89
N Category (Equity)	5	2	0	7
Z Category (Equity)	11	7	5	23
Mutual Funds	6	10	19	35
Corporate Bonds	0	3	0	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,172,429	5,177,817	-0.1%
	Mn USD	55,350	55,407	
Turnover	Mn BDT	6,548	9,377	-30.2%
	Mn USD	70	100	
Volume	Mn Shares	164	234	-29.8%
No. of Trade		160,308	177,763	-9.8%

\* Exchange Rate is BDT 93.45 as of Jul 03, 2022

Figure: Sectorial Turnover (BDT)

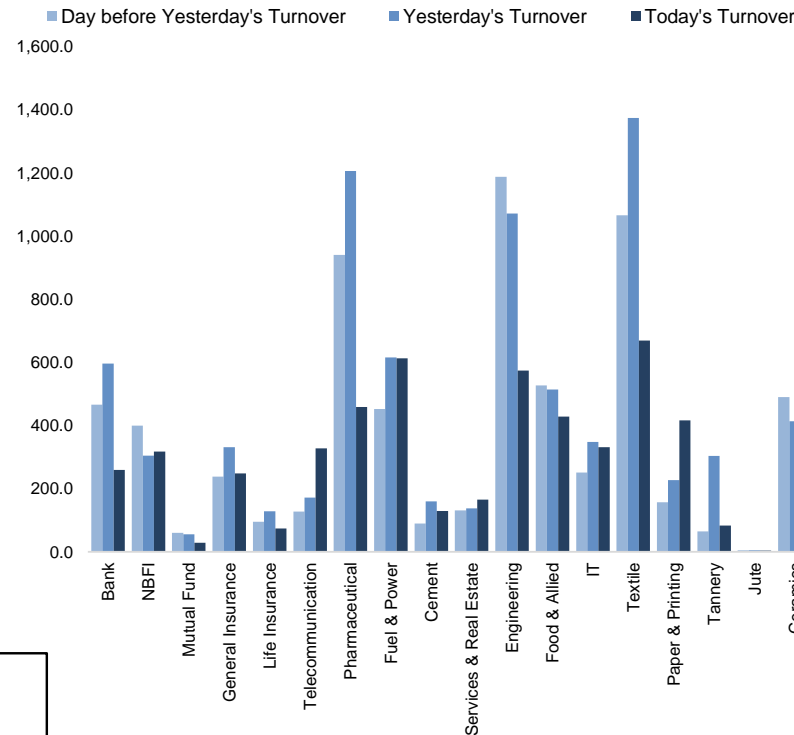
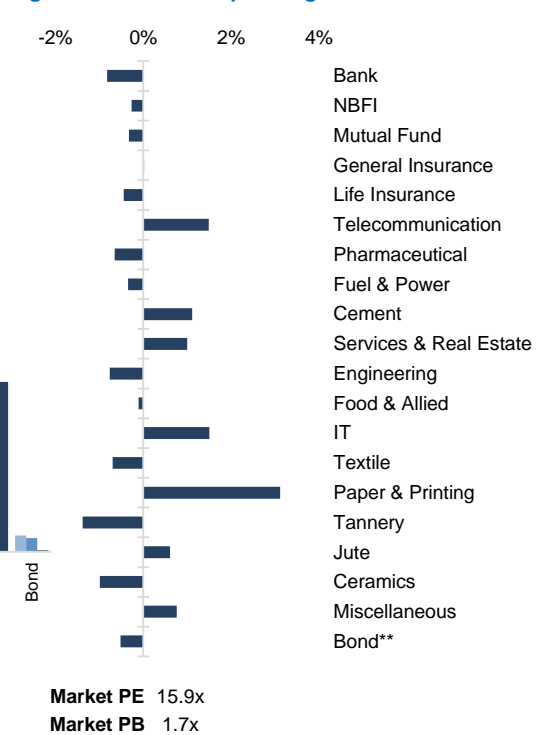


Figure: Sectorial Mcap Change



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	1,456	1,468	-12.05	-0.82%	33	669,143	14.7%	259.5	4.4%	8.0x	0.8x	GP	389,291	8.6%	17.7	11.7x	6.7x
NBFI	2,000	2,005	-5.28	-0.26%	23	196,745	4.3%	317.6	5.4%	NM	3.6x	WALTONHIL	328,374	7.2%	1.6	23.0x	3.4x
Mutual Fund	881	884	-2.87	-0.32%	36	38,983	0.9%	28.5	0.5%	NM	0.8x	BATBC	292,572	6.4%	37.3	19.2x	8.9x
General Insurance	3,406	3,405	+0.76	+0.02%	41	100,511	2.2%	248.2	4.2%	16.0x	1.6x	SQURPHARMA	190,676	4.2%	40.5	10.3x	1.9x
Life Insurance	2,299	2,310	-10.30	-0.45%	13	64,582	1.4%	73.6	1.2%	NM	NM	ROBI	173,376	3.8%	187.7	94.6x	2.6x
Telecommunication	5,087	5,012	+74.83	+1.49%	3	599,738	13.2%	327.9	5.6%	16.0x	4.4x	UPGDCL	144,924	3.2%	6.4	11.7x	4.4x
Pharmaceutical	3,761	3,785	-24.63	-0.65%	32	705,922	15.5%	458.3	7.8%	17.4x	2.5x	RENATA	142,342	3.1%	9.9	25.7x	5.0x
Fuel & Power	1,813	1,819	-6.29	-0.35%	23	472,941	10.4%	612.6	10.4%	11.7x	1.2x	BEXIMCO	115,061	2.5%	276.3	8.0x	1.5x
Cement	2,455	2,428	+27.11	+1.12%	7	120,233	2.6%	129.0	2.2%	25.5x	2.6x	BERGERPBL	81,495	1.8%	2.3	28.0x	7.7x
Services & Real Estate	1,435	1,421	+14.24	+1.00%	8	54,553	1.2%	165.0	2.8%	89.1x	1.0x	LHBL	80,948	1.8%	67.4	21.4x	4.6x
Engineering	4,690	4,726	-36.05	-0.76%	42	548,391	12.0%	574.0	9.7%	19.1x	1.9x	ICB	80,259	1.8%	3.1	45.4x	1.8x
Food & Allied	22,046	22,069	-23.48	-0.11%	21	391,931	8.6%	428.6	7.3%	23.7x	9.2x	MARICO	75,698	1.7%	4.5	21.3x	28.1x
IT	2,691	2,651	+39.91	+1.51%	11	34,057	0.7%	331.5	5.6%	27.7x	2.4x	BXPBARMA	68,969	1.5%	12.2	12.0x	1.7x
Textile	1,590	1,601	-11.20	-0.70%	58	171,806	3.8%	668.8	11.3%	25.8x	1.1x	BRACBANK	60,911	1.3%	17.8	11.5x	1.1x
Paper & Printing	7,926	7,686	+239.73	+3.12%	6	28,361	0.6%	415.9	7.1%	NM	2.0x	BEACONPHAR	59,413	1.3%	10.2	63.5x	10.2x
Tannery	3,243	3,288	-45.47	-1.38%	6	34,613	0.8%	82.9	1.4%	48.9x	3.4x	ISLAMIBANK	52,486	1.2%	1.7	10.7x	0.8x
Jute	8,613	8,561	+52.20	+0.61%	3	1,982	0.0%	4.1	0.1%	NM	28.0x	DUTCHBANGL	44,945	1.0%	3.2	7.8x	1.2x
Ceramics	794	801	-7.91	-0.99%	5	35,737	0.8%	225.0	3.8%	33.5x	2.1x	TITASGAS	41,547	0.9%	89.7	12.4x	0.6x
Miscellaneous	4,417	4,384	+33.40	+0.76%	15	245,304	5.4%	537.5	9.1%	12.1x	2.1x	POWERGRID	40,483	0.9%	15.2	11.0x	0.4x
Bond**	92	92	-0.48	-0.52%	9	38,241	0.8%	5.0	0.1%	NM	NM	SUMITPOWER	39,725	0.9%	9.9	9.5x	1.1x

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
ROBI	33.1	+10.0%	187.7	94.6x	2.6x	SQURPHARMA	124,759	7.3%	10.3x	1.9x	INTRACO	26.9	+7.6%	362.8	25.8x	2.3x
MEGHNAINS	54.2	+9.9%	38.3	74.9x	3.8x	BATBC	77,385	4.5%	19.2x	8.9x	SONALIPAPR	612.8	+5.3%	344.3	43.3x	2.5x
SHYAMPSUG	108.7	+9.9%	13.3	NM	NM	BEXIMCO	76,688	4.5%	8.0x	1.5x	BEXIMCO	131.3	+1.2%	276.3	8.0x	1.5x
BDTHAI	19.5	+8.3%	72.5	59.5x	0.7x	RENATA	69,363	4.1%	25.7x	5.0x	IPDC	56.1	+6.5%	201.0	23.2x	3.2x
ZEALBANGLA	185.8	+7.9%	5.2	NM	NM	BXPBARMA	48,154	2.8%	12.0x	1.7x	ROBI	33.1	+10.0%	187.7	94.6x	2.6x
INTRACO	26.9	+7.6%	362.8	25.8x	2.3x	BEACONPHAR	41,589	2.4%	63.5x	10.2x	FUWANGFOOD	24.5	-2.0%	145.5	NM	2.1x
BDWELDING	23.3	+7.4%	12.4	NM	2.0x	GP	38,929	2.3%	11.7x	6.7x	SPCERAMICS	50.8	-1.9%	136.9	NM	1.6x
ACMEPL	36.3	+6.8%	66.8	21.5x	2.0x	BRACBANK	32,746	1.9%	11.5x	1.1x	BSCCL	224.8	+2.6%	122.4	16.1x	3.3x
IPDC	56.1	+6.5%	201.0	23.2x	3.2x	LHBL	28,591	1.7%	21.4x	4.6x	COPPERTECH	41.3	+4.0%	115.1	23.9x	3.2x
DULAMIACOT	78.3	+6.4%	3.4	NM	NM	ISLAMIBANK	25,550	1.5%	10.7x	0.8x	AAMRANET	41.2	+5.4%	97.8	24.4x	1.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	Pubalibank	ROBI	CITYBANK	OLYMPIC	ALARABANK	BSRMLTD	SUMITPOWER	UPGDCL	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FUWANGFOOD	24.5	-2.0%	145.5	NM	2.1x	24,500	18,422	17,338	16,447	15,861	15,661	15,555	14,615	14,492	FORTUNE	102.5	91.5	15.0	3,717	350.28
PAPERPROC	177.4	-2.0%	14.2	58.1x	6.0x	18,422	18,384	17,338	16,447	15,861	15,661	15,555	14,615	14,492	BEXIMCO	130.0	130.0	1.0	600	78.00
ALLTEX	24.7	-2.0%	16.1	NM	4.2x	18,384	18,384	17,338	16,447	15,861	15,661	15,555	14,615	14,492	SONALIPAPR	618.9	571.0	12.0	87	50.23
PRIMEBANK	19.8	-2.0%	1.0	8.1x	0.7x	18,384	18,384	17,338	16,447	15,861	15,661	15,555	14,615	14,492	AL-HAJTEX	122.0	117.1	29.0	305	36.17
TAMIJTEX	198.4	-2.0%	4.4	33.1x	2.4x	18,384	18,384	17,338	16,447	15,861	15,661	15,555	14,615	14,492	PRIMEINSUR	105.0	99.3	6.0	241	24.22
PRIMEINSUR	99.2	-2.0%	48.8	45.3x	5.1x	18,384	18,384	17,338	16,447	15,861	15,661	15,555	14,615	14,492	ORIONPHARM	90.0	90.0	1.0	220	19.81
GP	288.3	-2.0%	17.7	11.7x	6.7x	18,384	18,384	17,338	16,447	15,861	15,661	15,555	14,615	14,492	APSCLBOND	5,470.0	5,470.0	2.0	3	18.93
ICB	99.6	-2.0%	3.1	45.4x	1.8x	18,384	18,384	17,338	16,447	15,861	15,661	15,555	14,615	14,492	BSCCL	221.0	216.3	4.0	66	14.32
NTC	658.0	-2.0%	2.1	NM	12.6x	18,384	18,384	17,338	16,447	15,861	15,661	15,555	14,615	14,492	DOREENPWR	77.2	77.2	3.0	148	11.43
PROGRESLIF	80.1	-2.0%	0.6	NM	NM	18,384	18,384	17,338	16,447	15,861	15,661	15,555	14,615	14,492	YPL	22.9	22.9	4.0	346	7.91

\*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
FORTUNE	102.5	91.5	350.3	3,717	15
BEXIMCO	130.0	130.0	78.0	600	1
SONALIPAPR	618.9	571.0	50.2	87	12
AL-HAJTEX	122.0	117.1	36.2	305	29
PRIMEINSUR	105.0	99.3	24.2	241	6
ORIONPHARM	90.0	90.0	19.8	220	1
APSCLBOND	5,470.0	5,470.0	18.9	3	2
BSCCL	221.0	216.3	14.3	66	4
DOREENPWR	77.2	77.2	11.4	148	3
YPL	22.9	22.9	7.9	346	4
RAKCERAMIC	51.0	51.0	5.6	110	1
MARICO	2,422.3	2,422.3	5.5	2	3
BANKASIA	20.6	20.6	4.6	222	2
BNICL	70.0	70.0	3.5	50	1
METROSPIN	28.2	28.1	3.0	106	2
MONNOFABR	28.5	28.5	2.8	97	3
INTRACO	25.5	25.0	2.7	106	2
SHURWID	21.5	21.5	2.6	120	1
PADMALIFE	49.0	49.0	2.5	50	1
ROBI	32.1	32.1	2.3	72	1
VFSTDL	25.9	24.1	1.9	74	3
KTL	29.1	29.1	1.8	61	3
<b>Total</b>			<b>655.0</b>		<b>105</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
APSCL Non-Convertible and Fully Redeemable Coupon Be:	-	0.0%	5.3%	Record Date	4-Jul-22
Janata Insurance Company Ltd.	-	5.0%	6.0%	Record Date	7-Jul-22
Bangladesh General Insurance Company Ltd.	-	0.0%	12.5%	Record Date	7-Jul-22
Pragati Life Insurance Ltd.	-	6.0%	11.0%	Record Date	7-Jul-22
Prime Insurance Company Ltd.	-	0.0%	15.0%	Record Date	12-Jul-22
NRB Commercial Bank Limited	-	7.5%	0.0%	Record Date	13-Jul-22
Union Insurance Company Limited	-	0.0%	5.0%	Record Date	20-Jul-22
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
Kay & Que (Bangladesh) Ltd.	-	0.0%	5.0%	Record Date	Notify later

**Important DSE News**
**YPL**

**(Q3 Un-audited):** EPS was Tk. (0.41) for January-March 2022 as against Tk. 0.01 for January-March 2021; EPS was Tk. 0.17 for July 2021-March 2022 as against Tk. (0.55) for July 2020-March 2021. NOCFPS was Tk. 0.68 for July 2021-March 2022 as against Tk. 0.67 for July 2020-March 2021. NAV per share was Tk. 11.30 as on March 31, 2022 and Tk. 11.12 as on June 30, 2021.

**PREMIERCEM**

The Company has informed that they have successfully installed and commissioned the Vertical Roller Mill (VRM) which was supplied by the FL Smidth, Denmark. The commercial production of VRM has started from July 1, 2022 and total production capacity will reach to 25,520 MT/Day from 8,000 MT/Day.

**EPGL**

The Company has informed that Energypac Power Venture Thakurgaon Limited (EPVTL), a Subsidiary of Energypac Power Generation Limited (EPGL) started the "Commercial Operation" of its HFO based 115 MW Independent Power Plant (IPP) situated at Gauripur, Jagannathpur, Thakurgaon Sadar, Thakurgaon. The initial agreement of the Company (EPVTL) with the Bangladesh Power Development Board (BPDB) is fifteen (15) years.

**SSSTEEL**

The Company has informed that the Board of Directors has decided to purchase of a corporate office floor space measuring 29,772.48 square feet located at The Pearl Trade Center, holding number Cha-90/3, Pragati Sarani, North Badda, Dhaka and purchase of another office floor space measuring 28,679.10 square feet located at Rahman A J Trade Center, holding number Ka-1/B, K-1/A, Ka-1/A/1 Jagannathpur, Dhaka. The total costs incurred for purchasing is BDT 15,40,74,505.00 (Fifteen Crore Forty Lac Seventy-Four Thousand Five Hundred & Five) only. This capital expenditure will reduce administrative expenses, enhance focus on operational activities and all units will be centralized.

**BSCCL**

The Company has informed that the Board of Directors has approved the agreement of 3.2 million USD (excluding VAT/Tax) between the SMW4 submarine cable consortium and the supplier to enhance 3800 GBPS bandwidth capacity through Upgradation#6 process of SMW4 consortium. Total bandwidth capacity of SMW4 submarine cable of the Company will be 4600 GBPS after successful completion of Upgradation#6 process.

**EBL**

Coloasia Limited, one of the Corporate Directors of the company, has further informed that it has completed its buying of 2,11,82,232 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 19.06.2022.

**PAPERPROC**

Magura Group Ltd., one of the Corporate Directors of the Company, has further informed that it has completed its sale of 1,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 23.06.2022.

**MONOSPOOL**

Referring to the BSEC letter No. SEC/SRMIC/94-22/179 dated April 28, 2022, Pearl Paper and Board Mills Ltd., one of the Sponsors of the Company, has expressed its intention to sell 63,526 shares out of its holding 63,526 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days.

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