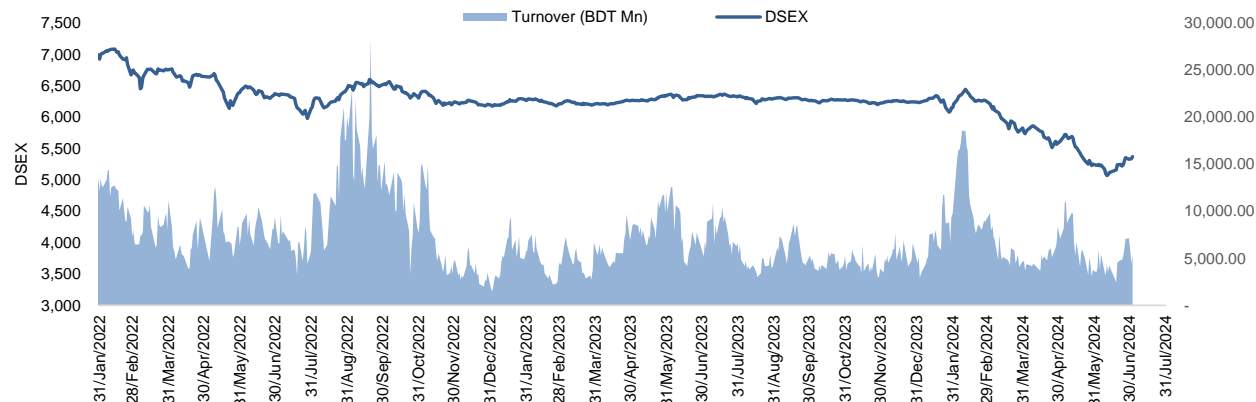


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.63%) gained 33.65 points and closed at 5,373.84. The blue-chip index DS30 (+0.44%), the Shariah-based index DSES (+0.75%), and the large-cap index CDSET (+0.10%) closed at 1,912.93, 1,186.55, and 1,037.16 points, respectively. Most of the large-cap sectors posted positive performance today. NBF1 booked the highest gain of 3.22% followed by Engineering (+1.20%), Food & Allied (+0.68%), Pharmaceutical (+0.40%), Bank (+0.25%), Fuel & Power (-0.39%), and Telecommunication (-1.62%), respectively. Block trades contributed 7.8% of the overall market turnover. Beach Hatchery Ltd. (+2.8%) was the most traded share with a turnover of BDT 162 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,373.84	5,340.19	+33.65	+0.63%	-14.0%
DS30	1,912.93	1,904.63	+8.30	+0.44%	-8.6%
DSES	1,186.55	1,177.74	+8.81	+0.75%	-13.0%
CDSET	1,037.16	1,036.15	+1.01	+0.10%	-13.8%

Figure: Sectorial Turnover (BDT Mn)

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

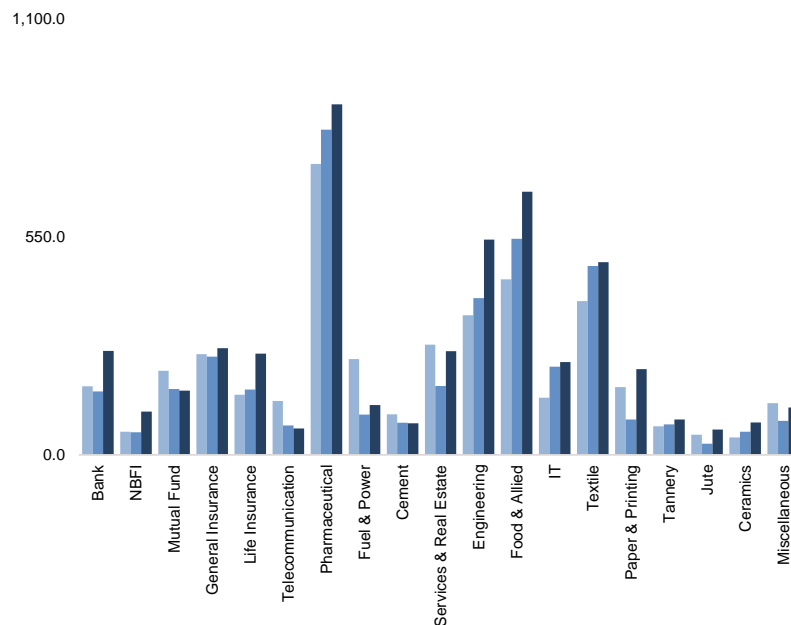
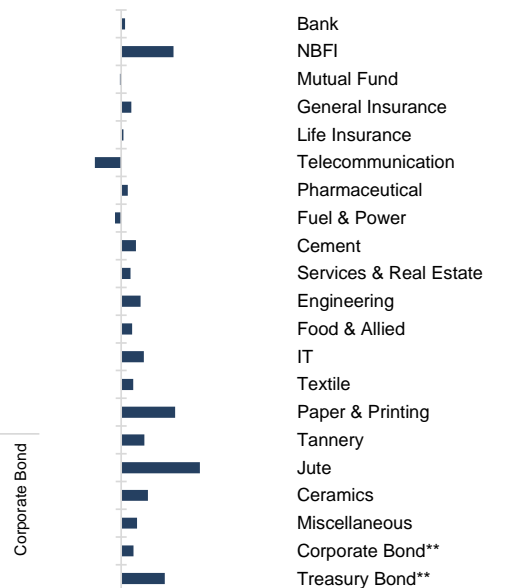


Figure: Sectorial Mcap Change

-5% 0% 5% 10%



	Advanced	Declined	Unchanged	Total
All Category	241	97	57	395
A Category (Equity)	133	68	34	235
B Category (Equity)	82	8	12	102
N Category (Equity)	1	2	1	4
Z Category (Equity)	25	19	10	54
Mutual Funds	8	14	15	37
Corporate Bonds	1	0	1	2
Treasury Bonds	1	0	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,618,638	6,605,406	+0.2%
	Mn USD	56,121	56,009	
Turnover	Mn BDT	5,393	4,406	+22.4%
	Mn USD	46	37	
Volume	Mn Shares	170	126	+34.5%
	No. of Trade	165,646	143,838	+15.2%

* Based on Traded Scrips

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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	1,289	1,286	+3.16	+0.25%	36	616,104	9.3%	262.0	5.3%	7.1x	0.6x	GP	324,342	8.9%	18.1	8.4x	4.1x
NBFI	1,159	1,122	+36.19	+3.22%	23	112,154	1.7%	109.2	2.2%	NM	NM	WALTONHIL	198,570	5.4%	20.2	15.3x	1.8x
Mutual Fund	664	665	-0.49	-0.07%	37	31,034	0.5%	161.9	3.3%	NM	0.6x	SQRPHARMA	185,800	5.1%	32.5	9.2x	1.5x
General Insurance	3,112	3,093	+19.10	+0.62%	43	90,148	1.4%	269.2	5.4%	16.3x	1.4x	BATBC	173,826	4.7%	50.6	10.0x	3.3x
Life Insurance	2,049	2,046	+2.85	+0.14%	15	54,466	0.8%	255.6	5.1%	NM	NM	ROBI	120,996	3.3%	35.8	31.6x	1.8x
Telecommunication	4,016	4,082	-66.26	-1.62%	3	464,995	7.0%	66.3	1.3%	10.5x	2.9x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,179	3,166	+12.76	+0.40%	33	606,930	9.2%	884.0	17.8%	16.4x	1.8x	RENATA	85,277	2.3%	22.1	37.2x	2.6x
Fuel & Power	1,240	1,245	-4.85	-0.39%	23	326,505	4.9%	125.9	2.5%	21.4x	0.7x	BERGERPBL	83,489	2.3%	1.1	25.7x	6.2x
Cement	2,340	2,319	+21.04	+0.91%	7	111,734	1.7%	79.4	1.6%	16.2x	2.2x	UPGDCL	79,128	2.2%	5.6	10.6x	2.3x
Services & Real Estate	1,523	1,514	+8.83	+0.58%	9	84,177	1.3%	261.4	5.3%	26.4x	0.6x	LHBL	72,005	2.0%	10.9	12.7x	3.0x
Engineering	3,144	3,107	+37.14	+1.20%	42	363,244	5.5%	542.4	10.9%	15.2x	1.1x	BRACBANK	61,409	1.7%	13.2	6.9x	0.9x
Food & Allied	16,084	15,975	+109.32	+0.68%	21	295,302	4.5%	663.5	13.3%	15.7x	5.0x	BXPHARMA	55,184	1.5%	39.9	10.4x	1.2x
IT	2,648	2,611	+36.57	+1.40%	11	34,831	0.5%	234.2	4.7%	28.7x	2.3x	UNILEVERCL	53,477	1.5%	149.0	62.0x	20.7x
Textile	1,230	1,221	+9.16	+0.75%	58	127,645	1.9%	485.7	9.8%	NM	0.9x	ICB	52,556	1.4%	4.0	NM	1.2x
Paper & Printing	7,118	6,888	+229.40	+3.33%	6	32,655	0.5%	216.1	4.3%	45.9x	1.4x	ISLAMIBANK	52,486	1.4%	0.0	8.3x	0.7x
Tannery	2,437	2,402	+34.52	+1.44%	6	26,687	0.4%	89.4	1.8%	38.4x	2.6x	DUTCHBANGL	40,777	1.1%	7.5	5.1x	0.8x
Jute	16,297	15,542	+755.34	+4.86%	3	3,819	0.1%	63.7	1.3%	NM	NM	BEACONPHAR	35,921	1.0%	18.7	79.7x	5.9x
Ceramics	511	502	+8.26	+1.65%	5	22,670	0.3%	81.5	1.6%	44.3x	1.4x	POWERGRID	35,638	1.0%	1.8	NM	0.2x
Miscellaneous	4,233	4,192	+40.82	+0.97%	15	230,621	3.5%	119.2	2.4%	38.9x	1.8x	EBL	35,312	1.0%	3.2	5.4x	0.8x
Corporate Bond**	6,310	6,262	+47.83	+0.76%	16	42,037	0.6%	0.1	0.0%	NM	NM	BESTHLDNG	30,824	0.8%	42.0	22.4x	0.5x
Treasury Bond**	187	182	+4.90	+2.69%	240	2,940,454	44.4%	0.7	0.0%	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
KBPPWBIL	105.6	+10.0%	6.2	NM	8.9x	SQRPHARMA	117,112	8.6%	9.2x	1.5x	BEACHHATCH	80.3	+2.8%	162.4	41.6x	6.4x
SILCOPHL	19.1	+9.8%	15.0	46.6x	0.8x	BEXIMCO	69,460	5.1%	NM	1.2x	UNILEVERCL	2,774.5	+1.2%	149.0	62.0x	20.7x
KDSALTD	42.6	+9.0%	34.8	22.1x	1.6x	BATBC	45,948	3.4%	10.0x	3.3x	AIL	115.0	+1.4%	106.8	46.6x	4.8x
HAMI	149.5	+8.7%	7.6	NM	16.4x	RENATA	35,002	2.6%	37.2x	2.6x	ORIONINFU	516.6	+5.4%	103.1	NM	34.6x
PENINSULA	17.5	+8.7%	7.1	NM	0.6x	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	SONALIPAPR	286.9	+7.1%	101.2	87.2x	1.7x
NHFIL	27.7	+8.2%	8.1	16.3x	1.4x	BXPHARMA	32,479	2.4%	10.4x	1.2x	ORIONPHARM	71.4	+1.3%	97.2	16.3x	0.8x
HEIDELBCEM	253.3	+7.6%	41.2	30.7x	3x	BRACBANK	32,157	2.4%	6.9x	0.9x	PRAGATILIF	133.4	-1.9%	90.2	NM	NM
BENGALWTL	22.8	+7.5%	10.1	45.6x	0.9x	GP	30,004	2.2%	8.4x	4.1x	ASIATICLAB	49.4	-2.8%	85.5	NM	1.0x
OIMEX	26.4	+7.3%	66.5	73.8x	8.5x	LHBL	24,690	1.8%	12.7x	3.0x	NAVANAPHAR	97.1	+6.9%	85.2	24.8x	2.3x
UNITEDFIN	10.5	+7.1%	1.6	14.2x	0.6x	EBL	24,199	1.8%	5.4x	0.8x	SEAPEARL	91.8	-1.2%	81.3	30.8x	4.7x
						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%	11.0x	1.1x						
						PRIMEBANK	12,985	1.0%	4.6x	0.7x						
						OLYMPIC	12,616	0.9%	15.4x	2.5x						
						UTTARABANK	11,350	0.8%	10.4x	0.7x						
						ORIONPHARM	11,317	0.8%	16.3x	0.8x						
						ROBI	10,738	0.8%	31.6x	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)
ATLASBANG	68.8	-3.0%	2.1	NM	0.6x						JAMUNAOIL	190.0	190.0	1.0	737	140.03
LINDEBD	1,208.9	-2.9%	43.8	32.8x	3x						NBL	6.0	6.0	1.0	7,800	46.80
IFIC1STMF	3.3	-2.9%	0.0	NM	0.4x						PRAGATILIF	139.0	139.0	2.0	250	34.75
KPPL	20.7	-2.8%	10.4	NM	NM						RUPALILIFE	202.0	189.0	6.0	166	31.56
ASIATICLAB	49.4	-2.8%	85.5	NM	1.0x						LOVELLO	95.0	86.5	7.0	261	23.43
APOLOISPAT	3.8	-2.6%	0.5	NM	0.2x						FINEFOODS	168.6	168.4	2.0	80	13.48
SAIFPOWER	23.1	-2.5%	77.3	36.1x	1.5x						BEXIMCO	125.6	104.1	3.0	116	12.31
SICL	31.0	-2.5%	19.1	NM	1.0x						AIL	113.4	110.0	4.0	109	12.30
AIBL1STIMF	7.9	-2.5%	4.0	NM	0.9x						BEACHHATCH	79.5	76.1	5.0	146	11.24
CAPITECGBF	16.0	-2.4%	0.8	NM	1.6x						NRBCBANK	10.0	9.7	4.0	1,133	11.16

* 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
JAMUNAOIL	190.0	190.0	140.0	737	1
NBL	6.0	6.0	46.8	7,800	1
PRAGATILIF	139.0	139.0	34.8	250	2
RUPALILIFE	202.0	189.0	31.6	166	6
LOVELLO	95.0	86.5	23.4	261	7
FINEFOODS	168.6	168.4	13.5	80	2
BEXIMCO	125.6	104.1	12.3	116	3
AIL	113.4	110.0	12.3	109	4
BEACHHATCH	79.5	76.1	11.2	146	5
NRBCBANK	10.0	9.7	11.2	1,133	4
CRYSTALINS	104.0	104.0	10.4	100	1
MALEKSPIN	32.4	32.4	9.1	280	1
BSC	99.3	99.3	8.4	85	1
SUNLIFEINS	52.3	47.3	8.0	160	2
EIL	43.2	38.3	7.3	171	2
RELIANCE1	19.5	19.1	5.7	296	4
RENATA	750.0	750.0	4.9	7	1
IFIC	8.6	8.6	3.1	362	1
AL-HAJTEX	146.1	146.1	2.5	17	1
BRACBANK	34.7	34.0	2.5	72	2
FUWANGFOOD	20.8	20.8	2.1	100	1
SHASHADNIM	23.5	23.5	1.9	80	1
Total			421.5		76

Important DSE News
BAYLEASING

The company has informed that the Board of Directors of the company has given approval to sell commercial floor space measuring 5265 (five thousand two hundred sixty-five) square feet, at the 1st Floor of Le Meridien Hotel, (Commercial Block Level-1), Block-C, 79/A Nikunja North C/A, Airport Road, Khilkhet, Dhaka-1229. The book value of the above-mentioned space is Tk. 6,00,79,800 (Taka six Crore seventy-nine thousand eight hundred) only.

(Q1 Un-audited): Consolidated EPS was Tk. (0.44) for January-March, 2024 as against Tk. (0.66) for January-March, 2023; Consolidated NOCFPS was Tk. 1.60 for January-March, 2024 as against Tk. 0.00 for January-March, 2023. Consolidated NAV per share was Tk. 5.57 as on March 31, 2024 and Tk. 6.01 as on December 31, 2023.

WALTONHIL

Please refer to their earlier news disseminated by DSE on 14.01.2024 and 30.04.2024 regarding sale declarations of Mr. S. M. Ashrafal Alam who is one of the Sponsor Directors of the Company. In this connection, the company has informed that Mr. S.M. Ashrafal Alam has executed the declarations by selling 56,109 shares through the trading system of the Exchange and transferring 193,891 shares to his son Mr. Shahriar Alam Shuvo, by way of gift, outside the trading system of the Exchange.

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

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