

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.12%) gained 61.38 points and closed at 5,558.94. The blue-chip index DS30 (+0.67%), the Shariah-based index DSES (+0.51%), and the large-cap index CDSET (+0.88%) closed at 1,964.49, 1,214.83, and 1,065.48 points, respectively. Most of the the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 3.21% followed by Telecommunication (+2.12%), Bank (+1.89%), Fuel & Power (+1.48%), NBF1 (+1.15%), Pharmaceutical (+0.12%), and Engineering (-1.01%), respectively. Block trades contributed 9.7% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+2.0%) was the most traded share with a turnover of BDT 346 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,558.94	5,497.56	+61.38	+1.12%	-11.0%
DS30	1,964.49	1,951.34	+13.16	+0.67%	-6.2%
DSES	1,214.83	1,208.70	+6.14	+0.51%	-10.9%
CDSET	1,065.48	1,056.17	+9.31	+0.88%	-11.4%

	Advanced	Declined	Unchanged	Total
All Category	305	69	24	398
A Category (Equity)	180	44	14	238
B Category (Equity)	82	14	6	102
N Category (Equity)	3	1	0	4
Z Category (Equity)	40	10	4	54
Mutual Funds	33	3	1	37
Corporate Bonds	1	1	0	2
Treasury Bonds	1	1	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,732,098	6,710,633	+0.3%
	Mn USD	57,111	56,929	
Turnover	Mn BDT	9,088	7,707	+17.9%
	Mn USD	77	65	
Volume	Mn Shares	315	274	+14.6%
No. of Trade		244,225	215,135	+13.5%

\* Average Interbank Exchange Rate is BDT 117.88 as of Jul 07, 2024

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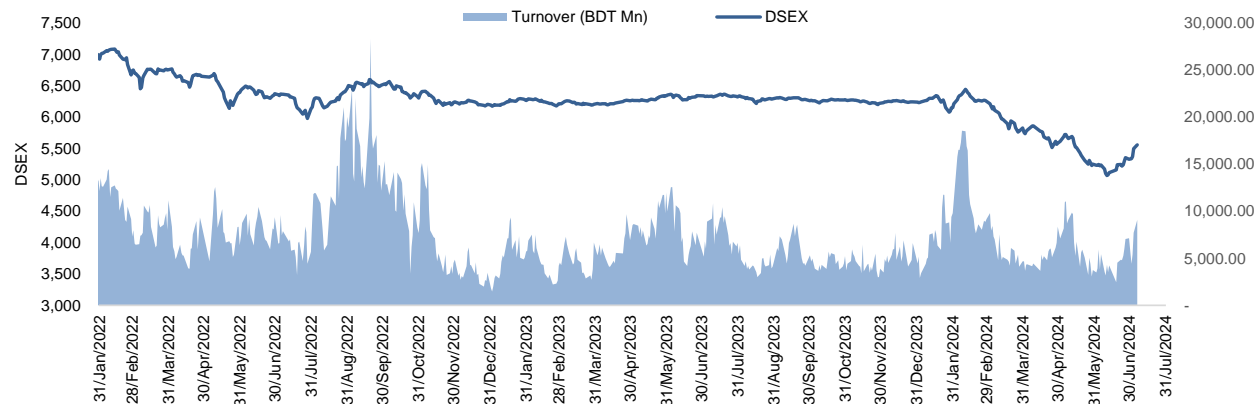


Figure: Sectorial Turnover (BDT Mn)

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

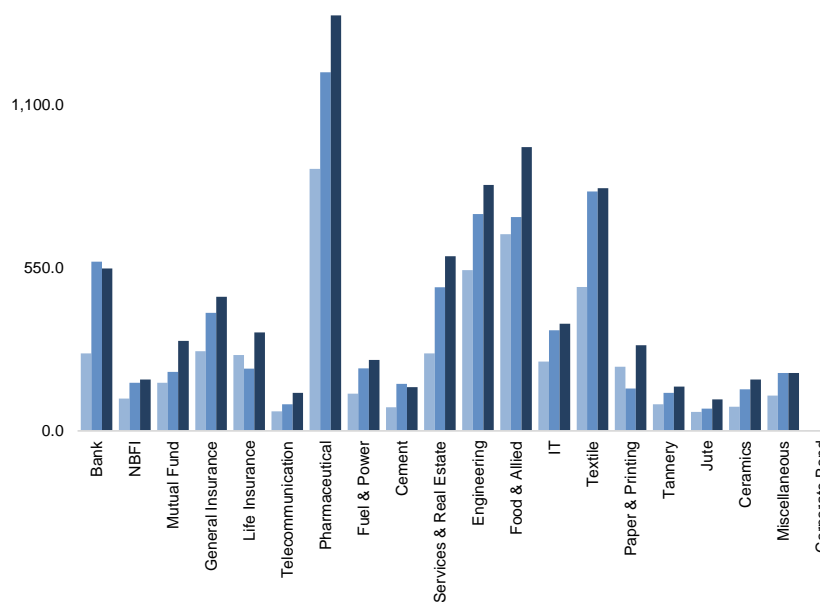
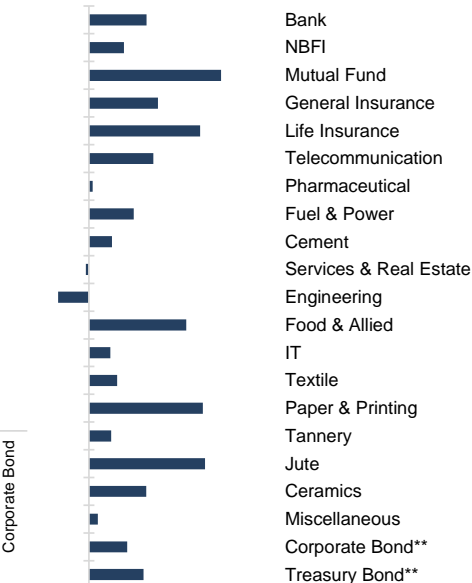


Figure: Sectorial Mcap Change

■ -2% ■ 0% ■ 2% ■ 4% ■ 6%



Market PE 15.0x  
Market PB 1.3x

\* 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	1,351	1,326	+25.09	+1.89%	36	646,511	9.6%	548.5	6.7%	7.5x	0.6x	GP	339,195	8.9%	43.1	8.8x	4.2x
NBFI	1,225	1,211	+13.98	+1.15%	23	118,608	1.8%	173.1	2.1%	NM	NM	WALTONHIL	193,420	5.1%	53.4	14.9x	1.8x
Mutual Fund	714	684	+29.74	+4.35%	37	33,358	0.5%	304.1	3.7%	NM	0.6x	BATBC	188,352	5.0%	256.7	10.8x	3.6x
General Insurance	3,284	3,211	+73.02	+2.27%	43	95,120	1.4%	452.3	5.5%	17.2x	1.5x	SQRPHARMA	187,573	4.9%	38.5	9.3x	1.5x
Life Insurance	2,176	2,099	+76.87	+3.66%	15	57,850	0.9%	332.7	4.1%	NM	NM	ROBI	129,377	3.4%	69.2	33.8x	1.9x
Telecommunication	4,221	4,133	+87.79	+2.12%	3	488,740	7.3%	127.9	1.6%	11.0x	3.0x	BEXIMCO	103,842	2.7%	0.1	NM	1.2x
Pharmaceutical	3,235	3,231	+4.01	+0.12%	33	617,562	9.2%	1,402.5	17.1%	16.7x	1.8x	RENATA	86,516	2.3%	26.6	37.7x	2.7x
Fuel & Power	1,287	1,268	+18.73	+1.48%	23	338,755	5.0%	239.1	2.9%	22.2x	0.7x	BERGERPBL	83,030	2.2%	2.9	25.5x	6.2x
Cement	2,419	2,401	+18.27	+0.76%	7	115,522	1.7%	147.2	1.8%	16.7x	2.3x	UPGDCL	82,375	2.2%	7.4	11.0x	2.4x
Services & Real Estate	1,606	1,608	-1.68	-0.10%	9	88,784	1.3%	589.2	7.2%	27.8x	0.6x	LHBL	74,444	2.0%	35.5	13.1x	3.1x
Engineering	3,162	3,194	-32.39	-1.01%	42	365,269	5.4%	830.5	10.1%	15.3x	1.1x	BRACBANK	65,302	1.7%	85.9	7.3x	0.9x
Food & Allied	17,017	16,488	+528.80	+3.21%	21	312,420	4.6%	957.6	11.7%	16.6x	5.2x	BXPHARMA	54,916	1.4%	35.9	10.3x	1.2x
IT	2,713	2,694	+18.88	+0.70%	11	35,686	0.5%	361.6	4.4%	29.4x	2.3x	ICB	53,683	1.4%	6.4	NM	1.3x
Textile	1,286	1,274	+11.85	+0.93%	58	133,450	2.0%	818.8	10.0%	NM	0.9x	UNILEVERCL	53,546	1.4%	97.1	62.0x	20.8x
Paper & Printing	7,556	7,283	+273.14	+3.75%	6	34,666	0.5%	289.1	3.5%	48.7x	1.5x	ISLAMIBANK	52,486	1.4%	0.0	8.3x	0.7x
Tannery	2,504	2,486	+18.26	+0.73%	6	27,423	0.4%	149.3	1.8%	39.5x	2.6x	DUTCHBANGL	43,765	1.2%	10.3	5.4x	0.9x
Jute	17,331	16,693	+637.68	+3.82%	3	4,061	0.1%	106.6	1.3%	NM	NM	POWERGRID	37,192	1.0%	3.5	NM	0.2x
Ceramics	533	533	+10.04	+1.88%	5	24,099	0.4%	173.4	2.1%	47.1x	1.5x	BEACONPHAR	36,845	1.0%	25.4	81.8x	6.0x
Miscellaneous	4,287	4,274	+12.57	+0.29%	15	233,575	3.5%	195.7	2.4%	39.4x	1.8x	EBL	36,262	1.0%	3.0	5.5x	0.8x
Corporate Bond**	6,459	6,379	+80.14	+1.26%	16	42,388	0.6%	0.1	0.0%	NM	NM	BESTHLDNG	33,472	0.9%	79.5	24.3x	0.5x
Treasury Bond**	195	192	+3.45	+1.80%	240	2,917,825	43.3%	5.3	0.1%	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
DELTASPINN	5.5	+10.0%	3.0	NM	0.4x	SQRPHARMA	117,112	8.6%	9.3x	1.5x	SEAPEARL	94.9	+2.0%	345.7	31.8x	4.9x
APOLOISPAT	4.4	+10.0%	3.4	NM	0.2x	BEXIMCO	69,460	5.1%	NM	1.2x	BATBC	348.8	+5.6%	256.7	10.8x	3.6x
LRGLOBMF1	4.4	+10.0%	1.9	NM	0.5x	BATBC	45,948	3.4%	10.8x	3.6x	ORIONPHARM	74.5	+0.8%	224.0	17.0x	0.8x
KBPPWBIL	127.7	+10.0%	9.6	NM	10.8x	RENATA	35,002	2.6%	37.7x	2.7x	SALVOCHEM	46.6	+5.9%	180.1	22.8x	2.8x
ZEALBANGLA	116.1	+9.9%	1.9	NM	NM	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	ASIATICLAB	54.4	+7.3%	171.0	NM	1.1x
1STPRIMFMF	42.4	+9.8%	55.8	NM	4.0x	BXPHARMA	32,479	2.4%	10.3x	1.2x	LOVELLO	92.4	+0.8%	156.0	67.0x	7.0x
DOREENPWR	30.2	+9.8%	29.5	7.6x	1x	BRACBANK	32,157	2.4%	7.3x	0.9x	SONALIPAPR	328.4	+8.7%	151.2	99.8x	1.9x
ICB3RDNRB	5.6	+9.8%	10.3	NM	1.0x	GP	30,004	2.2%	8.8x	4.2x	FEKDIL	20.0	+4.2%	132.4	12.8x	1.0x
RINGSHINE	4.5	+9.8%	4.6	NM	NM	LHBL	24,690	1.8%	13.1x	3.1x	EGEN	38.2	+4.4%	131.9	26.0x	1.7x
ILFSL	4.5	+9.8%	0.8	NM	NM	EBL	24,199	1.8%	5.5x	0.8x	RUPALILIFE	202.8	+8.3%	126.6	NM	NM

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NEWLINE	45.5	-3.0%	0.1	87.5x	1.8x	PUBALIBANK	20,448	1.5%	4.0x	0.6x	RUPALILIFE	206.0	183.0	33.0	1,419	276.11
WALTONHIL	638.5	-3.0%	53.4	14.9x	2x	NBL	16,930	1.2%	NM	1.3x	BANKASIA	18.5	18.5	1.0	10,000	185.00
ZAHINTEX	6.6	-2.9%	2.6	NM	0.9x	CITYBANK	16,830	1.2%	4.0x	0.6x	NBL	6.2	6.2	2.0	23,115	143.32
GLDNJMF	16.9	-2.9%	35.3	NM	1.7x	BSRMLTD	14,210	1.0%	4.6x	0.6x	JAMUNAOIL	190.0	190.0	2.0	331	62.81
DGIC	31.1	-2.8%	15.0	33.8x	2.6x	ALARABANK	13,534	1.0%	11.1x	1.1x	LOVELLO	100.7	89.1	10.0	340	31.80
RAHIMAFODD	143.0	-2.7%	30.8	NM	14.1x	PRIMEBANK	12,985	1.0%	4.8x	0.7x	RELIANCE1	19.8	19.7	6.0	1,033	20.36
CAPITECGBF	15.2	-2.6%	14.4	NM	1.6x	OLYMPIC	12,616	0.9%	16.0x	2.6x	CENTRALINS	53.5	53.3	5.0	317	16.89
CRYSTALINS	97.6	-2.5%	16.5	34.6x	3.9x	UTTARABANK	11,350	0.8%	11.7x	0.7x	ANLIMAYARN	30.5	30.5	1.0	500	15.25
SIMTEX	23.5	-2.5%	53.1	24.7x	1.1x	ORIONPHARM	11,317	0.8%	17.0x	0.8x	BEACHHATCH	88.3	77.9	4.0	171	13.71
WATACHEM	150.3	-2.4%	11.6	57.6x	2.4x	ROBI	10,738	0.8%	33.8x	1.9x	BEXIMCO	116.2	104.1	3.0	112	11.85

\* 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
RUPALILIFE	206.0	183.0	276.1	1,419	33
BANKASIA	18.5	18.5	185.0	10,000	1
NBL	6.2	6.2	143.3	23,115	2
JAMUNAOIL	190.0	190.0	62.8	331	2
LOVELLO	100.7	89.1	31.8	340	10
RELIANCE1	19.8	19.7	20.4	1,033	6
CENTRALINS	53.5	53.3	16.9	317	5
ANLIMAYARN	30.5	30.5	15.3	500	1
BEACHHATCH	88.3	77.9	13.7	171	4
BEXIMCO	116.2	104.1	11.9	112	3
NRBCBANK	10.4	9.9	11.6	1,143	3
PRIMEINSUR	38.5	38.5	11.6	300	1
RENATA	760.0	755.0	10.2	14	3
METROSPIN	19.8	19.8	6.4	325	1
CITYGENINS	97.1	97.1	5.3	55	1
NAHEEACP	37.2	37.2	5.0	135	1
PREMIERCEM	69.0	69.0	4.5	65	1
AFCAGRO	15.4	15.4	4.1	268	2
SILCOPHL	21.3	20.5	4.1	195	4
PRAGATILIF	149.2	131.7	3.3	24	4
ORIONINFU	528.0	509.6	3.1	6	2
SONALIANSH	309.0	309.0	3.1	10	1
<b>Total</b>			<b>883.1</b>		<b>122</b>

**Important DSE News**
**SONARGAON**

The company has informed that the Board of Directors has appointed Mr. Md. Anwar Hossain, Executive Director as Company Secretary of the company with effect from 01.07.2024.

**KARNAPHULI**

Meghna Life Insurance Co. Ltd., a Corporate Director of the Company, has expressed its intention to buy 2,00,000 shares of the Company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. within next 30 working days.

**YPL**

Mr. S.M. Maniruzzaman, a Sponsor of the company, has expressed his intention to transfer 1,561,415 shares of the company to Chaklader Rezaunul Alam, in demat form, outside the trading system of the Exchange, other than by way of gift, as per BSEC approval letters No. BSEC/SRIC/94-62 (Part-III)/03 dated January 03, 2024; No. BSEC/SRIC/111-2018/4/161 June 09, 2024 and regulation 47 of the Dhaka Stock Exchange (Listing) Regulations, 2015 as well as other applicable laws within July 15, 2024.

**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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