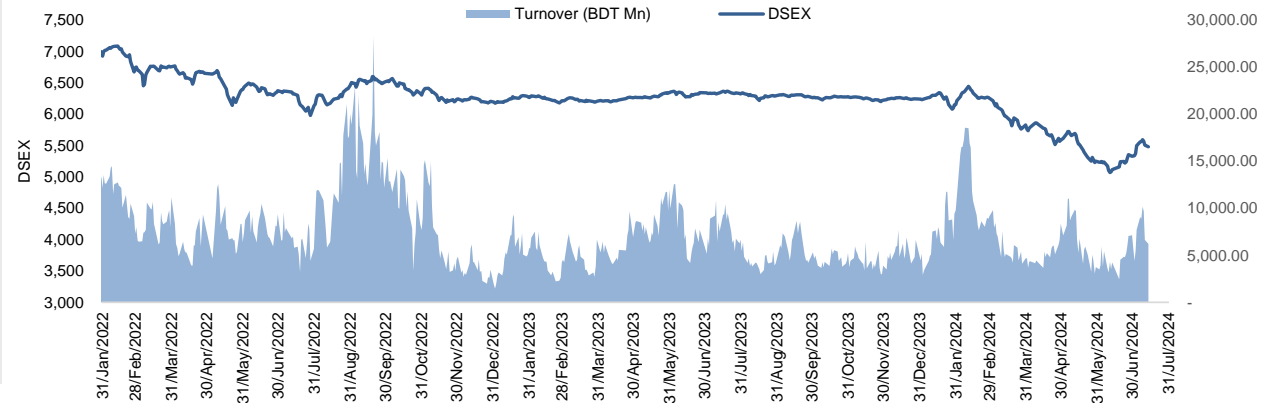


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.44%) lost 23.99 points and closed at 5,482.79. The blue-chip index DS30 (-0.27%), the Shariah-based index DSES (-0.40%), and the large-cap index CDSET (-0.29%) closed at 1,937.11, 1,202.70, and 1,049.58 points, respectively. Most of the large-cap sectors posted negative performance today. NBFI experienced the highest loss of 1.52% followed by Engineering (-1.15%), Fuel & Power (-1.15%), Bank (-0.41%), Pharmaceutical (-0.30%), Food & Allied (+0.22%), and Telecommunication (+0.76%), respectively. Block trades contributed 6.9% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (+7.2%) was the most traded share with a turnover of BDT 279 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,482.79	5,506.78	-23.99	-0.44%	-12.2%
DS30	1,937.11	1,942.36	-5.24	-0.27%	-7.5%
DSES	1,202.70	1,207.53	-4.83	-0.40%	-11.8%
CDSET	1,049.58	1,052.67	-3.09	-0.29%	-12.7%

	Advanced	Declined	Unchanged	Total
All Category	70	297	30	397
A Category (Equity)	44	171	21	236
B Category (Equity)	16	80	6	102
N Category (Equity)	1	4	0	5
Z Category (Equity)	9	42	3	54
Mutual Funds	3	27	7	37
Corporate Bonds	0	2	1	3
Treasury Bonds	0	0	0	0

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,621,486	6,636,526	-0.2%
	Mn USD	56,114	56,242	
Turnover	Mn BDT	6,223	6,643	-6.3%
	Mn USD	53	56	
Volume	Mn Shares	185	210	-11.8%
No. of Trade		167,075	181,335	-7.9%

* Average Interbank Exchange Rate is BDT 118.00 as of Jul 14, 2024

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Figure: Sectorial Turnover (BDT Mn)

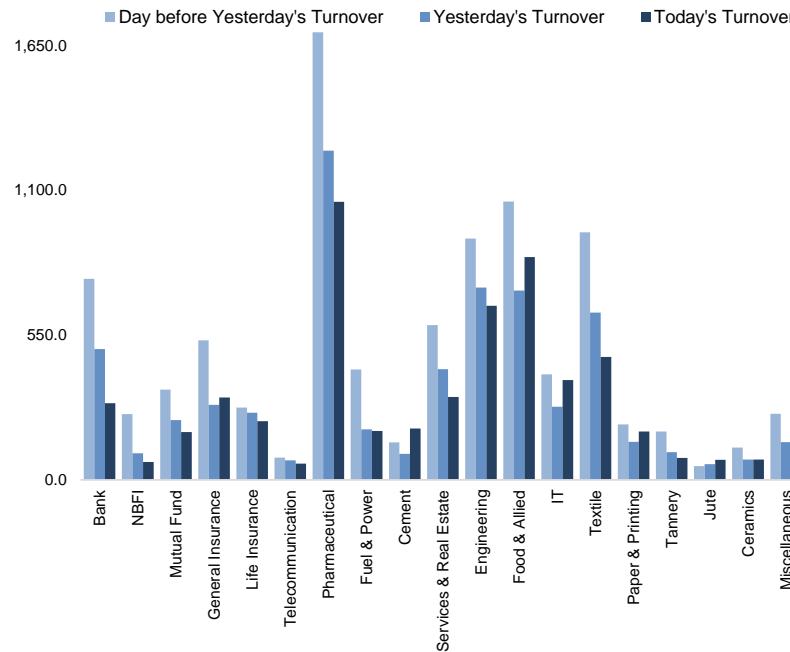
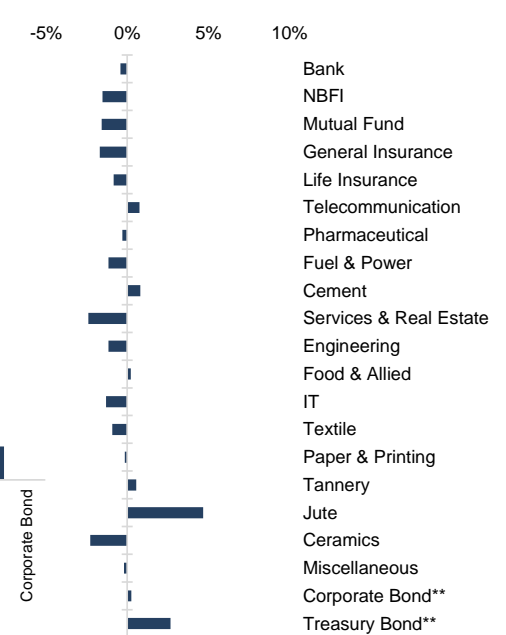


Figure: Sectorial Mcap Change



Market PE 14.6x
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	1,338	1,343	-5.53	-0.41%	36	640,849	9.7%	291.2	5.0%	7.3x	0.6x	GP	330,148	8.9%	32.6	8.5x	4.1x
NBFI	1,174	1,192	-18.17	-1.52%	23	113,662	1.7%	67.6	1.2%	NM	NM	SQURPHARMA	189,080	5.1%	28.2	9.3x	1.6x
Mutual Fund	689	700	-11.05	-1.58%	37	32,208	0.5%	181.6	3.1%	NM	0.6x	BATBC	180,576	4.9%	35.3	10.3x	3.4x
General Insurance	3,244	3,300	-55.98	-1.70%	43	93,979	1.4%	313.2	5.4%	17.0x	1.4x	WALTONHIL	178,667	4.8%	7.9	13.8x	1.6x
Life Insurance	2,070	2,088	-17.50	-0.84%	15	55,041	0.8%	223.2	3.9%	NM	NM	ROBI	127,282	3.4%	25.6	33.3x	1.9x
Telecommunication	4,118	4,087	+31.18	+0.76%	3	476,790	7.2%	61.6	1.1%	10.7x	2.9x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,205	3,215	-9.74	-0.30%	34	615,080	9.3%	1,056.0	18.2%	16.6x	1.8x	RENATA	84,245	2.3%	2.5	36.7x	2.6x
Fuel & Power	1,248	1,263	-14.51	-1.15%	23	328,698	5.0%	185.6	3.2%	21.6x	0.7x	BERGERPBL	83,874	2.3%	0.2	25.8x	6.2x
Cement	2,395	2,376	+19.21	+0.81%	7	114,374	1.7%	195.5	3.4%	16.6x	2.3x	UPGDCL	78,781	2.1%	2.0	10.5x	2.3x
Services & Real Estate	1,517	1,554	-37.21	-2.39%	9	83,884	1.3%	315.2	5.4%	26.3x	0.6x	LHBL	71,889	1.9%	20.7	12.7x	3.0x
Engineering	3,005	3,040	-35.08	-1.15%	42	347,146	5.2%	660.9	11.4%	14.5x	1.1x	BRACBANK	64,771	1.7%	26.7	7.3x	0.9x
Food & Allied	16,420	16,384	+36.81	+0.22%	21	301,475	4.6%	846.4	14.6%	16.0x	5.1x	BXPHARMA	53,400	1.4%	15.7	10.0x	1.1x
IT	2,611	2,646	-34.68	-1.31%	11	34,349	0.5%	378.6	6.5%	28.3x	2.2x	ISLAMIBANK	52,486	1.4%	0.0	8.3x	0.7x
Textile	1,261	1,273	-11.64	-0.91%	58	130,883	2.0%	466.3	8.1%	NM	0.9x	ICB	50,561	1.4%	3.6	NM	1.2x
Paper & Printing	7,261	7,272	-10.86	-0.15%	6	33,314	0.5%	183.4	3.2%	46.8x	1.4x	UNILEVERCL	49,816	1.3%	57.5	57.7x	19.3x
Tannery	2,451	2,438	+13.54	+0.56%	6	26,849	0.4%	83.8	1.4%	38.6x	2.6x	DUTCHBANGL	41,920	1.1%	2.0	5.2x	0.8x
Jute	18,130	17,317	+812.38	+4.69%	3	4,248	0.1%	76.6	1.3%	NM	NM	EBL	36,126	1.0%	1.8	5.5x	0.8x
Ceramics	520	532	-12.13	-2.28%	5	23,078	0.3%	77.4	1.3%	45.1x	1.4x	POWERGRID	36,004	1.0%	2.0	NM	0.2x
Miscellaneous	4,296	4,304	-8.16	-0.19%	15	234,059	3.5%	126.5	2.2%	39.5x	1.8x	BEACONPHAR	34,165	0.9%	13.3	75.8x	5.6x
Corporate Bond**	6,616	6,598	+17.23	+0.26%	16	41,824	0.6%	0.4	0.0%	NM	NM	BESTHLDNG	31,671	0.9%	38.1	23.0x	0.5x
Treasury Bond**	221	216	+5.75	+2.67%	238	2,889,278	43.6%	0.0	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
TECHNODRUG	26.4	+10.0%	0.0	NM	0.9x	SQURPHARMA	117,112	8.6%	9.3x	1.6x	LOVELLO	104.0	+7.2%	279.0	75.4x	7.9x
FARCHEM	22.5	+9.8%	16.3	NM	0.7x	BEXIMCO	69,460	5.1%	NM	1.2x	AGNISYSL	29.3	+0.7%	223.2	27.4x	1.8x
HEIDELBCEM	297.4	+8.7%	129.1	36.1x	4.0x	BATBC	45,948	3.4%	10.3x	3.4x	BEACHHATCH	94.7	+2.9%	216.0	49.1x	7.6x
ACFL	19.9	+8.2%	14.3	NM	0.6x	RENATA	35,002	2.6%	36.7x	2.6x	SALVOCEM	53.4	+0.9%	180.0	26.2x	3.2x
LOVELLO	104.0	+7.2%	279.0	75.4x	7.9x	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	SEAPEARL	84.2	-3.0%	176.6	28.3x	4.3x
GEMINISEA	319.0	+7.0%	117.8	45.2x	14.5x	BXPHARMA	32,479	2.4%	10.0x	1.1x	OIMEX	30.5	+3.0%	157.3	85.2x	9.8x
AMANFEED	30.8	+6.9%	19.6	75.1x	1x	BRACBANK	32,157	2.4%	7.3x	0.9x	SONALIPAPR	316.1	-0.5%	140.7	96.1x	1.9x
ADVENT	29.2	+6.6%	116.7	29.5x	1.8x	GP	30,004	2.2%	8.5x	4.1x	HEIDELBCEM	297.4	+8.7%	129.1	36.1x	4.0x
SONALIANS	320.6	+5.8%	76.3	37.3x	4.8x	LHBL	24,690	1.8%	12.7x	3.0x	AFTABAUTO	42.7	-1.2%	128.3	NM	0.9x
NEWLINE	47.6	+5.5%	0.1	91.5x	1.9x	EBL	24,199	1.8%	5.5x	0.8x	INTRACO	39.8	+2.1%	122.9	51.0x	3.2x
						PUBALIBANK	20,448	1.5%	4.0x	0.6x						
						NBL	16,930	1.2%	NM	1.3x						
						CITYBANK	16,830	1.2%	4.1x	0.6x						
						BSRMLTD	14,210	1.0%	4.6x	0.6x						
						ALARABANK	13,534	1.0%	11.2x	1.1x						
						PRIMEBANK	12,985	1.0%	4.7x	0.7x						
						OLYMPIC	12,616	0.9%	15.6x	2.5x						
						UTTARABANK	11,350	0.8%	11.7x	0.8x						
						ORIONPHARM	11,317	0.8%	16.2x	0.8x						
						ROBI	10,738	0.8%	33.3x	1.9x						
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)					
SONALILIFE	74.4	-3.0%	12.0	NM	NM	NBL	6.4	6.4	3.0	13,942	89.23					
PROVATIINS	35.6	-3.0%	2.4	22.8x	2x	LOVELLO	99.5	94.1	23.0	928	88.64					
LINDEBD	1,113.5	-3.0%	1.0	30.2x	2.8x	GHCL	47.6	47.0	5.0	1,483	69.71					
SEAPEARL	84.2	-3.0%	176.6	28.3x	4.3x	RANFOUNDRY	160.0	160.0	1.0	313	50.00					
PEOPLESINS	38.9	-3.0%	10.1	15.0x	1.2x	PREMIERCEM	71.4	67.5	6.0	244	16.70					
COPPERTECH	29.2	-3.0%	9.5	67.9x	2.2x	CENTRALINS	61.9	61.0	5.0	188	11.49					
PRIMEFIN	6.5	-3.0%	0.4	NM	0.7x	MEGHNAINS	34.0	34.0	5.0	293	9.96					
MIRAKHTER	39.0	-3.0%	1.4	11.2x	0.8x	1STPRIMFMF	45.0	43.5	10.0	186	8.25					
WATACHEM	150.0	-3.0%	4.4	57.5x	2.4x	PTL	72.0	72.0	1.0	104	7.52					
EASTERNINS	52.2	-3.0%	3.1	27.5x	1.0x	KTL	16.1	16.1	1.0	400	6.44					

* 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
NBL	6.4	6.4	89.2	13,942	3
LOVELLO	99.5	94.1	88.6	928	23
GHCL	47.6	47.0	69.7	1,483	5
RANFOUNDRY	160.0	160.0	50.0	313	1
PREMIERCEM	71.4	67.5	16.7	244	6
CENTRALINS	61.9	61.0	11.5	188	5
MEGHNAINS	34.0	34.0	10.0	293	5
1STPRIMFMF	45.0	43.5	8.3	186	10
PTL	72.0	72.0	7.5	104	1
KTL	16.1	16.1	6.4	400	1
SPCERAMICS	37.5	37.5	5.9	156	1
TITASGAS	23.1	23.1	5.4	235	1
SAIFPOWER	25.7	22.8	5.2	224	2
BEACHHATCH	93.0	92.0	5.1	55	2
DGIC	30.6	30.6	4.9	161	1
GBBPOWER	9.5	9.5	4.8	500	1
DAFODILCOM	79.0	79.0	4.0	50	1
EMERALDOIL	47.0	46.9	3.8	82	2
MEGHNALIFE	78.9	72.0	3.3	43	2
EBL	26.9	26.9	2.7	100	1
ASIATICLAB	52.4	52.4	2.4	46	2
BSCPLC	113.0	113.0	2.4	21	1
Total			431.8		106

Important DSE News
TECHNODRUG

Trading of shares of Techno Drugs Limited will start from today i.e., July 14, 2024 under the main market of DSE. Trading Code and Company code for Techno Drugs Limited at DSE will be "TECHNODRUG" and "18499" respectively under "Pharmaceuticals & Chemicals" Sector.

As per un-audited Q3 financial statements, profit after tax was BDT 39.13 million and basic EPS BDT 0.42 for the 03 (three) months (January-March, 2024) period ended on 31 March 2024 as against profit after tax of BDT 29.59 million and basic EPS of BDT 0.31 for the same period of the previous year. However, Post-IPO basic EPS for the 03 (three) months (January-March 2024) period ended on 31 March 2024 would be BDT 0.30. Moreover, profit after tax was BDT 242.93 million and basic EPS of BDT 2.58 for the 9 (nine) months (July'23-March'24) period ended on 31 March 2024 as against profit after tax of BDT 178.53 million and basic EPS of BDT 1.90 for the same period of the previous year. However, Post-IPO EPS would be BDT 1.84 for 09 (nine) months (July'23- March'24) period ended on 31 March 2024. Pre-IPO Net Asset Value (NAV) per share with revaluation reserve (considering Pre-IPO paid up shares) would be BDT 30.32 as on 31 March 2024 and the same would be BDT 29.21 (considering Post-IPO paid up shares). Pre-IPO Net Asset Value (NAV) per share without revaluation reserve (considering Pre-IPO paid up shares) would be BDT 25.15 as on 31 March 2024 and the same would be BDT 25.51 (considering Post-IPO paid up shares) Pre-IPO weighted average paid-up number of shares for 03 (three) months (January-March, 2024) and 09 (nine) months (July'23- March'24) period ended on 31 March 2024 was 94,157,400 which was same for the same period of the previous year. However, Post-IPO paid-up number of shares would be 131,998,188.

UTTARABANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.66 for April-June 2024 as against Tk. 0.80 for April-June 2023; Consolidated EPS was Tk. 2.35 for January-June 2024 as against Tk. 1.46 for January-June 2023. Consolidated NOCFPS was Tk. 6.60 for January-June 2024 as against Tk. (5.99) for January-June 2023. Consolidated NAV per share was Tk. 28.44 as on June 30, 2024 and Tk. 25.16 as on June 30, 2023.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BIFC		0.0%	0%	Record Date	12-Aug-24

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