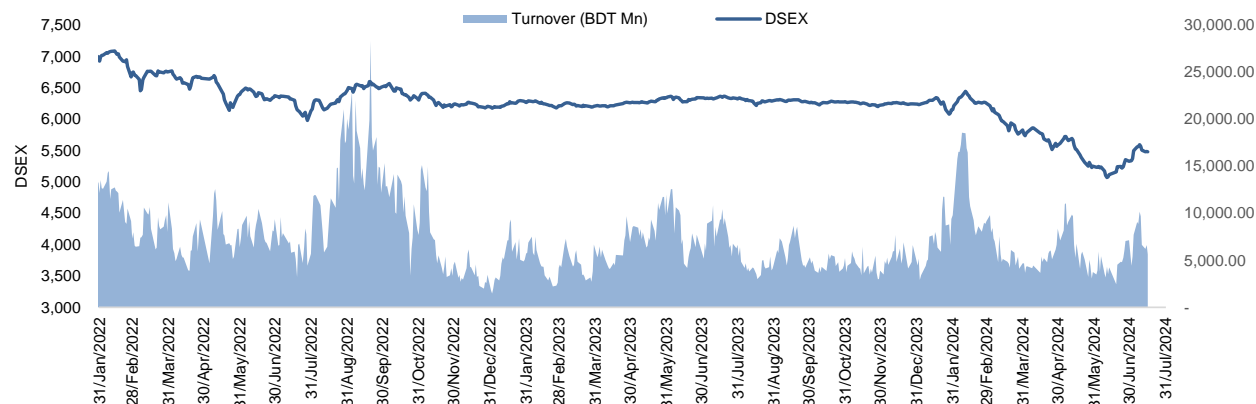


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.03%) lost 1.82 points and closed at 5,483.14. The blue-chip index DS30 (+0.88%), the Shariah-based index DSES (-0.13%), and the large-cap index CDSET (+0.24%) closed at 1,961.37, 1,201.86, and 1,051.50 points, respectively. Most of the large-cap sectors posted positive performance today. NBF1 booked the highest gain of 2.22% followed by Engineering (+1.82%), Telecommunication (+1.12%), Bank (+1.01%), Pharmaceutical (+0.36%), Food & Allied (-0.12%), and Fuel & Power (-0.31%), respectively. Block trades contributed 9.0% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (-2.9%) was the most traded share with a turnover of BDT 233 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,483.14	5,484.97	-1.82	-0.03%	-12.2%
DS30	1,961.37	1,944.29	+17.08	+0.88%	-6.3%
DSES	1,201.86	1,203.43	-1.57	-0.13%	-11.9%
CDSET	1,051.50	1,048.95	+2.55	+0.24%	-12.6%

	Advanced	Declined	Unchanged	Total
All Category	121	221	55	397
A Category (Equity)	86	115	35	236
B Category (Equity)	26	66	10	102
N Category (Equity)	2	2	1	5
Z Category (Equity)	7	38	9	54
Mutual Funds	5	21	11	37
Corporate Bonds	1	1	0	2
Treasury Bonds	0	1	0	1

\* Based on Traded Scripts

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,640,779	6,637,527	+0.0%
	Mn USD	56,278	56,250	
Turnover	Mn BDT	5,644	6,622	-14.8%
	Mn USD	48	56	
Volume	Mn Shares	180	181	-0.2%
No. of Trade		151,395	172,388	-12.2%

\* Average Interbank Exchange Rate is BDT 118.00 as of Jul 16, 2024

<b>Fahim Hassan</b> Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	<b>Md Istiaz Uddin</b> Research Associate (880) 1708805202 mistiaz.uddin@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

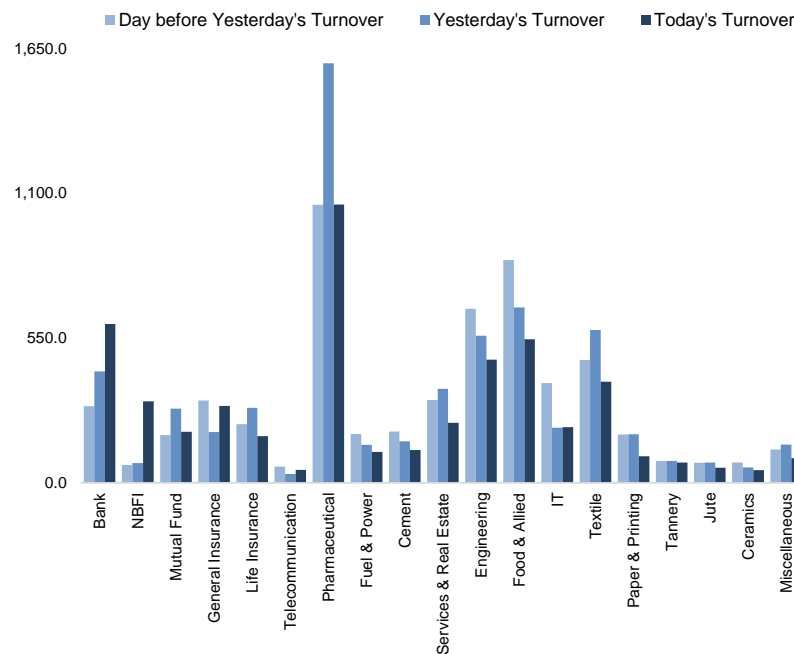
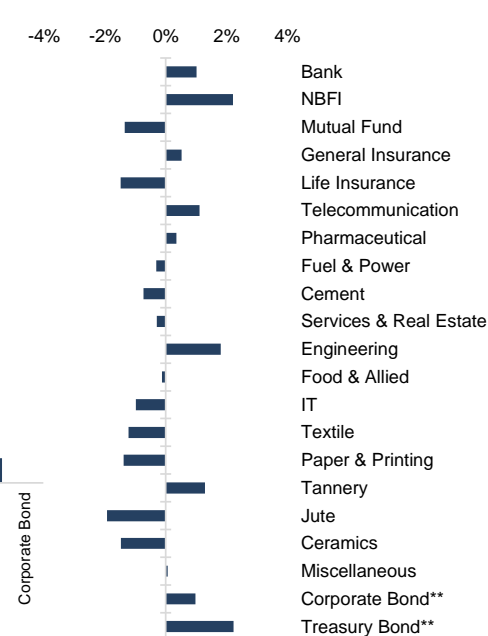


Figure: Sectorial Mcap Change



Market PE 14.7x

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	1,347	1,334	+13.53	+1.01%	36	645,356	9.7%	603.1	11.7%	7.4x	0.6x	GP	336,630	9.0%	19.9	8.7x	4.2x
NBFI	1,202	1,176	+26.06	+2.22%	23	116,345	1.8%	309.8	6.0%	NM	NM	WALTONHIL	200,084	5.3%	62.5	15.5x	1.8x
Mutual Fund	673	682	-9.20	-1.35%	37	31,427	0.5%	193.7	3.8%	NM	0.6x	SQRPHARMA	190,321	5.1%	59.1	9.4x	1.6x
General Insurance	3,257	3,240	+17.03	+0.53%	43	94,339	1.4%	292.3	5.7%	17.0x	1.4x	BATBC	181,980	4.9%	31.1	10.4x	3.5x
Life Insurance	2,048	2,079	-30.90	-1.49%	15	54,449	0.8%	177.1	3.4%	NM	NM	ROBI	125,710	3.4%	25.0	32.9x	1.9x
Telecommunication	4,160	4,114	+45.91	+1.12%	3	481,667	7.3%	48.8	1.0%	10.8x	3.0x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,263	3,252	+11.59	+0.36%	34	619,528	9.3%	1,056.5	20.6%	16.7x	1.8x	RENATA	85,174	2.3%	5.8	37.1x	2.6x
Fuel & Power	1,241	1,244	-3.89	-0.31%	23	326,617	4.9%	117.6	2.3%	21.4x	0.7x	BERGERPBL	84,612	2.3%	5.1	26.0x	6.3x
Cement	2,401	2,418	-17.71	-0.73%	7	114,651	1.7%	124.9	2.4%	16.6x	2.3x	UPGDCL	78,607	2.1%	1.8	10.5x	2.3x
Services & Real Estate	1,497	1,502	-4.37	-0.29%	9	82,780	1.2%	227.8	4.4%	25.9x	0.6x	LHBL	72,005	1.9%	23.7	12.7x	3.0x
Engineering	3,174	3,117	+56.60	+1.82%	42	366,687	5.5%	467.7	9.1%	15.3x	1.1x	BRACBANK	65,479	1.7%	23.8	7.4x	0.9x
Food & Allied	16,423	16,443	-19.45	-0.12%	21	301,527	4.5%	545.0	10.6%	16.0x	5.1x	ISLAMIBANK	52,486	1.4%	0.0	8.3x	0.7x
IT	2,595	2,620	-25.74	-0.98%	11	34,136	0.5%	211.5	4.1%	28.2x	2.2x	BXPHARMA	51,526	1.4%	15.6	9.7x	1.1x
Textile	1,251	1,266	-15.47	-1.22%	58	129,768	2.0%	384.6	7.5%	NM	0.9x	ICB	51,428	1.4%	2.6	NM	1.2x
Paper & Printing	7,127	7,227	-99.91	-1.38%	6	32,699	0.5%	101.1	2.0%	45.9x	1.4x	UNILEVERCL	49,442	1.3%	14.9	57.3x	19.2x
Tannery	2,475	2,443	+31.49	+1.29%	6	27,107	0.4%	77.2	1.5%	39.0x	2.6x	DUTCHBANGL	42,271	1.1%	7.4	5.3x	0.9x
Jute	17,440	17,784	-343.46	-1.93%	3	4,087	0.1%	57.9	1.1%	NM	NM	EBL	36,670	1.0%	103.4	5.6x	0.8x
Ceramics	510	517	-7.61	-1.47%	5	22,633	0.3%	47.8	0.9%	44.2x	1.4x	POWERGRID	36,004	1.0%	1.5	NM	0.2x
Miscellaneous	4,291	4,289	+2.90	+0.07%	15	233,835	3.5%	93.6	1.8%	39.4x	1.8x	BEACONPHAR	33,264	0.9%	13.8	73.8x	5.4x
Corporate Bond**	6,725	6,660	+65.35	+0.98%	16	41,874	0.6%	0.1	0.0%	NM	NM	BESTHLDNG	30,824	0.8%	26.2	22.4x	0.5x
Treasury Bond**	233	228	+5.07	+2.23%	238	2,878,849	43.4%	0.1	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
NRBBANK	12.1	+10.0%	187.0	11.7x	0.9x	SQRPHARMA	117,112	8.6%	9.4x	1.6x	LOVELLO	103.3	-2.9%	233.3	74.9x	7.8x
TECHNODRUG	31.9	+10.0%	0.1	NM	1.1x	BEXIMCO	69,460	5.1%	NM	1.2x	DBH	34.1	+6.6%	204.4	7.6x	0.8x
RANFOUNDRY	168.6	+10.0%	49.4	NM	5.1x	BATBC	45,948	3.4%	10.4x	3.5x	ORIONINFU	571.8	+1.0%	198.6	NM	38.3x
KOHINOOR	672.9	+7.5%	63.9	59.4x	11.7x	RENATA	35,002	2.6%	37.1x	2.6x	NRBBANK	12.1	+10.0%	187.0	11.7x	0.9x
LIBRAINFU	779.4	+7.3%	38.8	NM	0.9x	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	SEAPEARL	84.9	+1.2%	154.6	28.5x	4.4x
SKICL	50.7	+7.0%	17.1	12.2x	2.2x	BXPHARMA	32,479	2.4%	9.7x	1.1x	SALVOCHEM	51.4	-0.8%	112.5	25.2x	3.1x
DBH	34.1	+6.6%	204.4	7.6x	1x	BRACBANK	32,157	2.4%	7.4x	0.9x	FEKDIL	20.2	-2.4%	106.9	12.9x	1.0x
AMCL(PRAN)	250.6	+6.4%	15.7	50.1x	2.8x	GP	30,004	2.2%	8.7x	4.2x	EBL	27.0	+1.5%	103.4	5.6x	0.8x
BANKASIA	18.9	+5.6%	25.9	14.3x	0.7x	LHBL	24,690	1.8%	12.7x	3.0x	GEMINISEA	313.2	-0.1%	94.2	44.4x	14.3x
AMBEEPFA	836.4	+5.6%	11.6	NM	81.8x	EBL	24,199	1.8%	5.6x	0.8x	GHCL	45.7	-2.8%	90.5	NM	1.0x
						PUBALIBANK	20,448	1.5%	4.0x	0.6x						
						NBL	16,930	1.2%	NM	1.3x						
						CITYBANK	16,830	1.2%	4.2x	0.7x						
						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	0.6x						
						OLYMPIC	12,616	0.9%	15.4x	2.5x						
						UTTARABANK	11,350	0.8%	12.0x	0.8x						
						ORIONPHARM	11,317	0.8%	16.1x	0.8x						
						ROBI	10,738	0.8%	32.9x	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)
PRIMETEX	16.2	-3.0%	0.8	NM	0.2x						CITYGENINS	86.0	86.0	2.0	3,000	258.00
RUPALILIFE	172.0	-3.0%	17.9	NM	NM						NBL	6.4	6.4	2.0	12,892	82.51
SEMLIBLSF	6.5	-3.0%	0.0	NM	0.7x						PRAGATILIF	142.1	138.3	10.0	356	49.60
ITC	42.3	-3.0%	44.6	14.4x	2.1x						CENTRALINS	64.0	59.0	3.0	515	31.04
HEIDELCEM	300.3	-3.0%	42.2	36.4x	4.0x						LOVELLO	106.0	103.3	5.0	129	13.49
KBPWBIL	121.6	-3.0%	0.6	NM	10.3x						SAMORITA	79.7	79.0	3.0	103	8.13
SHURWID	9.9	-2.9%	0.8	NM	0.8x						DBH	35.0	35.0	3.0	200	7.00
NEWLINE	46.2	-2.9%	0.1	88.8x	1.9x						1STPRIMFMF	48.0	47.5	2.0	100	4.78
BEACHHATCH	89.2	-2.9%	40.1	46.2x	7.1x						ADNTEL	102.0	102.0	3.0	45	4.59
FARCHEM	23.2	-2.9%	6.3	NM	0.7x						SONALIPAPR	342.0	341.0	3.0	13	4.28

\* 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
CITYGENINS	86.0	86.0	258.0	3,000	2
NBL	6.4	6.4	82.5	12,892	2
PRAGATILIF	142.1	138.3	49.6	356	10
CENTRALINS	64.0	59.0	31.0	515	3
LOVELLO	106.0	103.3	13.5	129	5
SAMORITA	79.7	79.0	8.1	103	3
DBH	35.0	35.0	7.0	200	3
1STPRIMFMF	48.0	47.5	4.8	100	2
ADNTEL	102.0	102.0	4.6	45	3
SONALIPAPR	342.0	341.0	4.3	13	3
RELIANCE1	20.7	20.7	3.6	175	4
NRBBANK	11.9	11.3	3.2	270	2
SHYAMPSUG	140.0	140.0	2.7	20	4
SONALILIFE	81.0	81.0	2.7	34	3
CNATEX	7.7	7.7	2.7	350	2
MEGHNALIFE	78.6	78.6	2.3	29	1
EGEN	40.0	40.0	2.0	50	1
EGEN	40.0	40.0	2.0	50	1
BEACHHATCH	94.9	90.9	2.0	21	2
BBSCABLES	30.0	30.0	1.6	53	1
RUPALILIFE	191.0	182.0	1.6	9	2
OIMEX	30.0	28.8	1.6	53	2
<b>Total</b>			<b>506.2</b>		<b>83</b>

**Important DSE News**

**SKICL**

**(Q2 Un-audited):** EPS was Tk. 1.14 for April-June 2024 as against Tk. 0.65 for April-June 2023; EPS was Tk. 2.06 for January-June 2024 as against Tk. 1.32 for January-June 2023. NOCFPS was Tk. 5.05 for January-June 2024 as against Tk. 3.25 for January-June 2023. NAV per share was Tk. 22.83 as on June 30, 2024 and Tk. 22.43 as on December 31, 2023. The company has further informed that EPS and NOCFPS have been increased (January-June 2024) due to increase in Business Income and Interest Income.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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