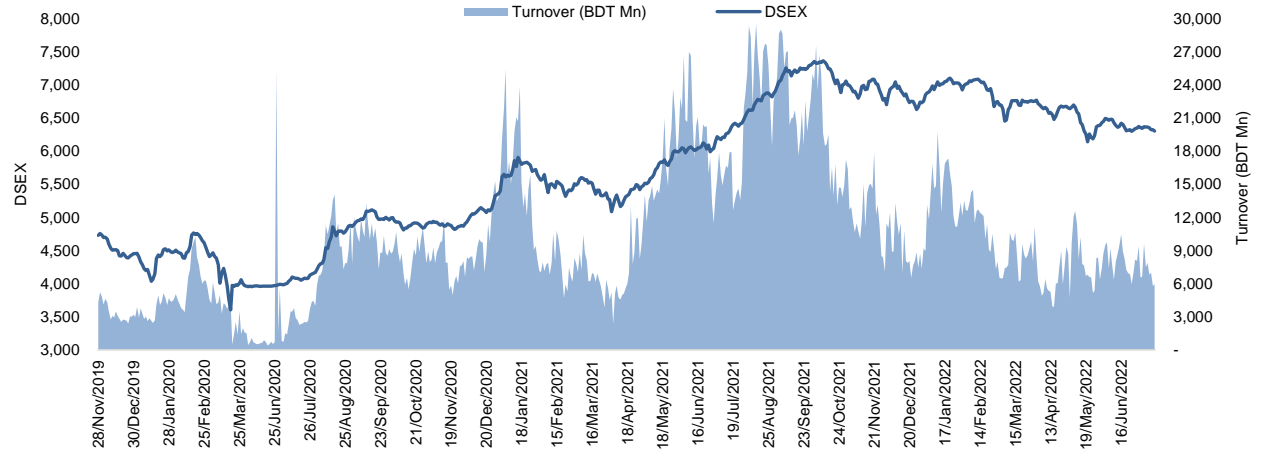


The market closed in red today. The benchmark index DSEX (-0.32%) lost 20.22 points and closed at 6,304.29. The blue-chip index DS30 (-0.28%), the Shariah-based index DSES (-0.08%), and the large-cap index CDSET (-0.31%) closed at 2,267.56, 1,376.24, and 1,245.44 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.74% followed by Fuel & Power (-0.43%), Bank (-0.32%), Telecommunication (-0.24%), Engineering (-0.11%), Food & Allied (+0.03%), and Pharmaceutical (+0.19%), respectively. Block trades contributed 0.8% of the overall market turnover. Bangladesh Export Import Company Ltd. (-1.6%) was the most traded share with a turnover of BDT 397 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,304.29	6,324.50	-20.22	-0.32%	-6.7%
DS30	2,267.56	2,273.85	-6.29	-0.28%	-10.5%
DSES	1,376.24	1,377.35	-1.11	-0.08%	-3.8%
CDSET	1,245.44	1,249.26	-3.82	-0.31%	-8.4%

	Advanced	Declined	Unchanged	Total
All Category	99	236	47	382
A Category (Equity)	66	162	36	264
B Category (Equity)	18	64	7	89
N Category (Equity)	2	3	1	6
Z Category (Equity)	13	7	3	23
Mutual Funds	2	14	19	35
Corporate Bonds	2	2	1	5

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,148,237	5,159,604	-0.2%
	Mn USD	54,798	54,919	
Turnover	Mn BDT	5,935	5,806	+2.2%
	Mn USD	63	62	
Volume	Mn Shares	161	144	+11.9%
No. of Trade		149,625	144,334	+3.7%

* Exchange Rate is BDT 93.95 as of Jul 17, 2022

Figure: Sectorial Turnover (BDT)

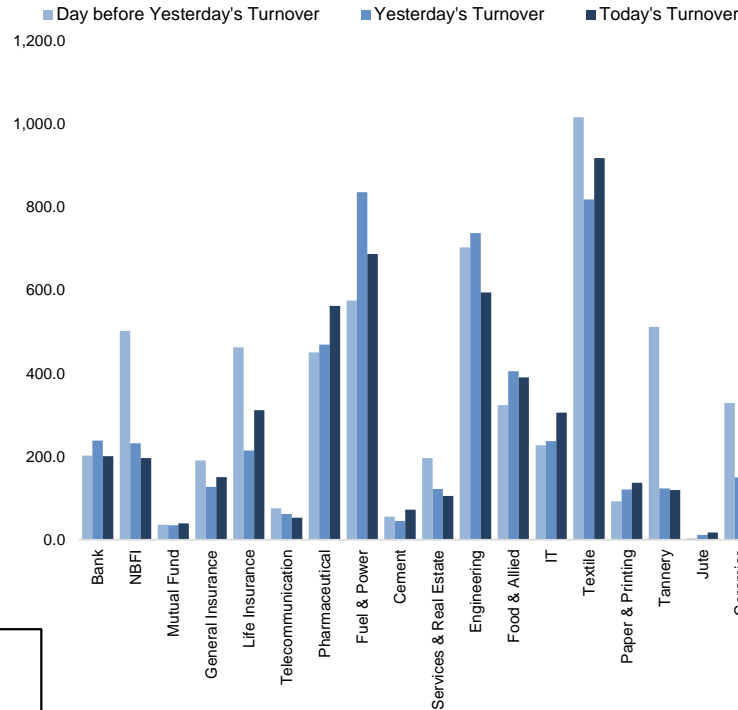
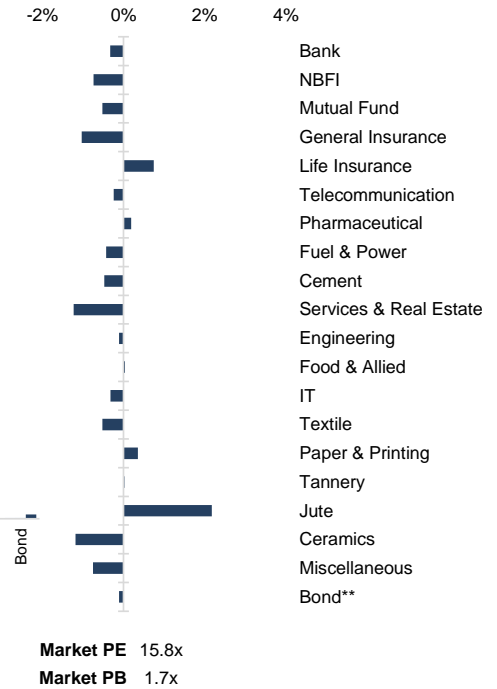


Figure: Sectorial Mcap Change



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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	1,436	1,441	-4.68	-0.32%	33	662,335	14.6%	201.0	3.5%	7.8x	0.8x	GP	391,317	8.6%	20.6	11.7x	6.7x
NBFI	1,997	2,012	-14.80	-0.74%	23	196,673	4.3%	196.6	3.4%	NM	3.6x	WALTONHIL	327,102	7.2%	2.1	22.9x	3.4x
Mutual Fund	876	881	-4.59	-0.52%	36	38,602	0.9%	39.5	0.7%	NM	0.8x	BATBC	290,628	6.4%	29.2	19.0x	8.8x
General Insurance	3,237	3,271	-33.63	-1.03%	41	95,684	2.1%	150.4	2.6%	15.2x	1.6x	SQURPHARMA	190,676	4.2%	32.7	10.3x	1.9x
Life Insurance	2,359	2,342	+17.49	+0.75%	13	67,993	1.5%	311.3	5.4%	NM	NM	ROBI	173,376	3.8%	5.3	94.6x	2.6x
Telecommunication	5,109	5,121	-12.54	-0.24%	3	601,499	13.3%	52.8	0.9%	16.1x	4.4x	UPGDCL	143,938	3.2%	3.8	11.6x	4.4x
Pharmaceutical	3,743	3,735	+7.14	+0.19%	32	702,841	15.5%	562.0	9.7%	17.3x	2.5x	RENATA	142,545	3.1%	5.3	25.7x	5.0x
Fuel & Power	1,829	1,837	-7.90	-0.43%	23	477,398	10.5%	686.4	11.8%	11.9x	1.2x	BEXIMCO	110,416	2.4%	396.8	7.7x	1.0x
Cement	2,432	2,444	-11.58	-0.47%	7	117,205	2.6%	72.2	1.2%	24.8x	2.5x	BERGERPBL	81,161	1.8%	0.4	27.9x	7.7x
Services & Real Estate	1,404	1,422	-17.50	-1.23%	8	53,095	1.2%	105.4	1.8%	73.9x	1.0x	ICB	79,453	1.8%	2.2	45.0x	1.8x
Engineering	4,673	4,678	-5.08	-0.11%	42	547,138	12.1%	594.2	10.2%	19.0x	1.9x	LHBL	79,206	1.7%	34.4	20.9x	4.5x
Food & Allied	21,963	21,955	+7.64	+0.03%	21	390,009	8.6%	390.3	6.7%	23.8x	9.1x	MARICO	75,628	1.7%	0.9	21.3x	28.1x
IT	2,626	2,634	-8.45	-0.32%	11	33,643	0.7%	305.7	5.3%	27.3x	2.4x	BXPHARMA	66,114	1.5%	22.7	11.5x	1.7x
Textile	1,611	1,620	-8.46	-0.52%	58	173,808	3.8%	917.0	15.8%	26.1x	1.1x	BEACONPHAR	58,559	1.3%	11.0	62.6x	10.0x
Paper & Printing	7,873	7,845	+27.60	+0.35%	6	28,818	0.6%	136.8	2.4%	NM	2.0x	BRACBANK	57,918	1.3%	13.1	10.9x	1.1x
Tannery	3,169	3,169	+0.75	+0.02%	6	33,848	0.7%	119.2	2.1%	47.8x	3.3x	ISLAMIBANK	52,808	1.2%	10.8	10.7x	0.8x
Jute	9,036	8,844	+192.47	+2.18%	3	2,082	0.0%	17.1	0.3%	NM	29.4x	TITASGAS	45,306	1.0%	162.2	13.6x	0.6x
Ceramics	771	780	-9.24	-1.18%	5	34,370	0.8%	178.8	3.1%	32.2x	2.1x	DUTCHBANGL	44,667	1.0%	2.6	7.7x	1.2x
Miscellaneous	4,334	4,367	-32.84	-0.75%	15	240,329	5.3%	762.0	13.1%	11.8x	2.0x	POWERGRID	40,911	0.9%	36.0	11.2x	0.4x
Bond**	90	90	-0.10	-0.11%	9	37,194	0.8%	10.6	0.2%	NM	NM	SUMITPOWER	39,618	0.9%	5.3	9.4x	1.1x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MITHUNKNIT	17.6	+10.0%	7.0	NM	5.5x
ICBIBANK	5.5	+10.0%	13.8	NM	NM
STANCERAM	160.4	+9.9%	6.4	NM	21.6x
MEGHNA PET	42.1	+9.9%	9.9	NM	NM
MEGCONMILK	38.8	+9.9%	20.1	NM	NM
GHCL	38.0	+9.5%	31.0	NM	0.7x
BIFC	6.7	+8.1%	0.6	NM	NM
MIRACLEIND	37.8	+8.0%	74.4	NM	1.2x
TALLUSPIN	10.9	+7.9%	12.0	NM	0.5x
INTECH	34.4	+7.8%	55.9	NM	3.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DESCO	39.2	-2.0%	1.3	19.6x	0.6x
YPL	19.7	-2.0%	3.1	NM	1.7x
KTL	24.7	-2.0%	97.4	50.3x	1.4x
GLOBALINS	34.7	-2.0%	4.3	35.1x	2.5x
PROVATIINS	64.7	-2.0%	24.1	14.6x	2.8x
SILCOPHL	24.9	-2.0%	12.6	29.3x	1.1x
REPUBLIC	39.9	-2.0%	1.7	16.6x	2.3x
SONARGAON	50.0	-2.0%	29.3	NM	4.4x
MEGHNAINS	50.0	-2.0%	0.7	69.1x	3.5x
QUEENSOUTH	25.0	-2.0%	32.8	13.9x	1.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	124,759	7.3%	10.3x	1.9x
BATBC	76,871	4.5%	19.0x	8.8x
BEXIMCO	73,592	4.3%	7.7x	1.4x
RENATA	69,462	4.1%	25.7x	5.0x
BXPHARMA	46,161	2.7%	11.5x	1.7x
BEACONPHAR	40,991	2.4%	62.6x	10.0x
GP	39,132	2.3%	11.7x	6.7x
BRACBANK	31,137	1.8%	10.9x	1.1x
LHBL	27,975	1.6%	20.9x	4.5x
ISLAMIBANK	25,707	1.5%	10.7x	0.8x
EBL	24,575	1.4%	7.4x	1.1x
NBL	18,883	1.1%	NM	0.5x
CITYBANK	18,180	1.1%	5.1x	0.8x
PUBALIBANK	18,103	1.1%	5.8x	0.6x
ROBI	17,338	1.0%	94.6x	2.6x
OLYMPIC	15,735	0.9%	17.1x	2.7x
BSRMLTD	15,298	0.9%	5.3x	0.7x
ALARABANK	15,042	0.9%	11.1x	1.1x
SUMITPOWER	14,576	0.9%	9.4x	1.1x
UPGDCL	14,394	0.8%	11.6x	4.4x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	126.0	-1.6%	396.8	7.7x	1.4x
INTRACO	30.9	+3.7%	290.2	29.6x	2.6x
TITASGAS	45.8	-1.9%	162.2	13.6x	0.6x
DELTA LIFE	153.2	+3.2%	138.6	NM	NM
FUWANGFOOD	25.4	-0.4%	117.0	NM	2.2x
SPCERAMICS	47.1	-1.9%	110.7	NM	1.5x
ACIFORMULA	162.8	+2.5%	101.2	27.6x	2.5x
KTL	24.7	-2.0%	97.4	50.3x	1.4x
PADMALIFE	49.3	+0.8%	94.0	NM	NM
GOLDENSON	19.7	-1.5%	89.8	32.4x	1.0x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
IPDC	63.6	62.4	3.0	592	36.93
GPHISPAT	50.5	50.5	1.0	273	13.79
INTRACO	30.6	29.3	5.0	260	7.76
DELTA LIFE	150.0	148.0	3.0	51	7.56
HRTEX	99.5	99.5	1.0	60	5.92
SUNLIFEINS	55.0	54.6	4.0	99	5.44
SEAPEARL	48.0	48.0	1.0	100	4.80
MLDYEING	25.0	25.0	1.0	170	4.25
RUPALILIFE	65.5	65.5	1.0	58	3.81
EPGL	42.0	42.0	1.0	81	3.39

*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
IPDC	63.6	62.4	36.9	592	3
GPHISPAT	50.5	50.5	13.8	273	1
INTRACO	30.6	29.3	7.8	260	5
DELTALIFE	150.0	148.0	7.6	51	3
HRTEX	99.5	99.5	5.9	60	1
SUNLIFEINS	55.0	54.6	5.4	99	4
SEAPEARL	48.0	48.0	4.8	100	1
MLDYEING	25.0	25.0	4.3	170	1
RUPALILIFE	65.5	65.5	3.8	58	1
EPGL	42.0	42.0	3.4	81	1
TAKAFULINS	50.9	50.9	3.1	62	1
GP	294.1	294.1	2.9	10	1
TITASGAS	46.7	45.8	2.9	62	2
SONARGAON	54.0	54.0	2.3	43	1
LIBRAINFU	916.0	916.0	1.8	2	1
PRIMETEX	40.0	40.0	1.8	45	1
AL-HAJTEX	127.5	127.5	1.6	13	1
NPOLYMER	54.6	54.6	1.5	28	2
PREMIERBAN	14.5	14.5	1.5	100	1
ACFL	28.3	28.3	1.2	43	1
ZAHINTEX	9.5	9.5	1.2	128	2
PDL	12.5	12.5	1.1	90	1
Total			125.7		49

Important DSE News
ICBIBANK

(Q2 Un-audited): EPS was Tk. 0.15 for April-June 2022 as against Tk. (0.17) for April-June 2021; EPS was Tk. 0.02 for January-June 2022 as against Tk. (0.32) for January-June 2021. NOCFPS was Tk. (0.39) for January-June 2022 as against Tk. 0.67 for January-June 2021. NAV per share was Tk. (18.12) as on June 30, 2022 and Tk. (17.86) as on June 30, 2021.

PRAGATILIF

(Q2 Un-audited): Increase in life revenue account for Apr-June 2022 was Tk. 37.60 mn. with total life insurance fund of Tk. 6,130.65 mn. as against increase in Tk. 25.82 mn. and Tk. 5,992.03 mn. respectively for the same period of the previous year. Increase in life revenue account for Jan-June 2022 was Tk. 39.87 mn. with total life insurance fund of Tk. 6,130.65 mn. as against increase in Tk. 47.22 mn. and Tk. 5,992.03 mn. respectively for the same period of the previous year.

STANCERAM

The Company has informed that the Board of Directors of the Company has decided to take bank loan a sum of BDT 15.00 crore (Taka Fifteen crore) as additional working capital loan to solve working capital crisis. The company further informed that they needed to take the loan due to; i) In 2019-20, their Glost Kiln was re-built and factory was partially laid off for 3 months (approx.) ii) Due to COVID-2019 industry was closed down for 3 months (approx.) iii) Currently Russia and Ukraine war pushed cost of all raw materials, shipping and transport cost to an unprecedented level; and iv) Recent flood has affected the market.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
Rupali Life Insurance Company Limited	-	0.0%	18.0%	Record Date	17-Aug-22

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