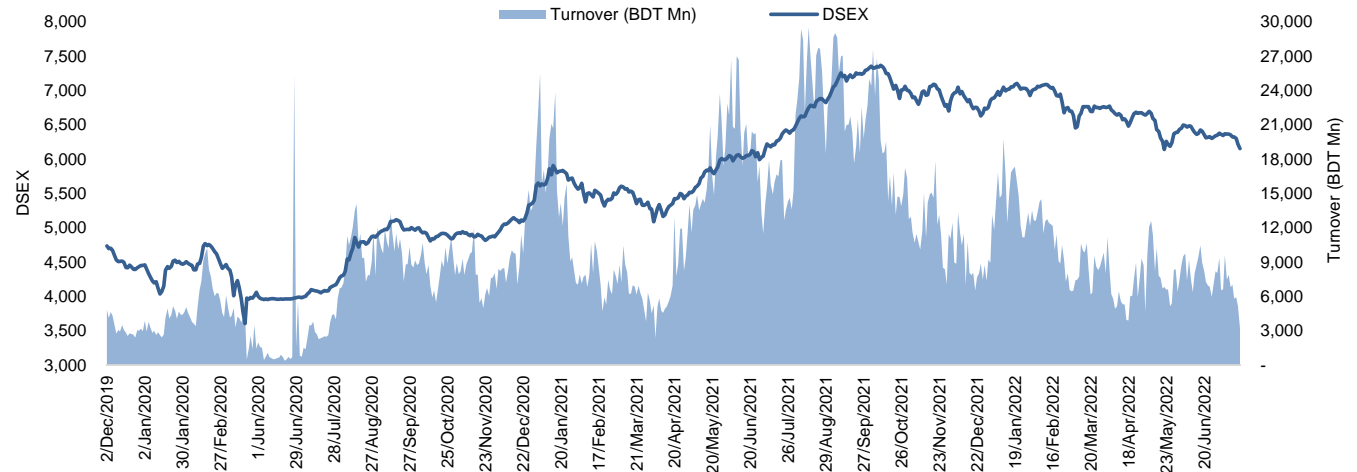


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.02%) lost 63.71 points and closed at 6,153.18. The blue-chip index DS30 (-1.01%), the Shariah-based index DSES (-0.85%), and the large-cap index CDSET (-0.79%) closed at 2,213.24, 1,348.06, and 1,219.50 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.74% followed by Food & Allied (-1.51%), Fuel & Power (-1.35%), Telecommunication (-1.31%), Engineering (-1.31%), Pharmaceutical (-0.61%), and Bank (-0.49%), respectively. Block trades contributed 2.2% of the overall market turnover. British American Tobacco Bangladesh Company Limited (-1.4%) was the most traded share with a turnover of BDT 104 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,153.18	6,216.89	-63.71	-1.02%	-8.9%
DS30	2,213.24	2,235.83	-22.60	-1.01%	-12.6%
DSES	1,348.06	1,359.63	-11.58	-0.85%	-5.8%
CDSET	1,219.50	1,229.19	-9.69	-0.79%	-10.3%

	Advanced	Declined	Unchanged	Total
All Category	21	344	17	382
A Category (Equity)	14	240	10	264
B Category (Equity)	4	80	5	89
N Category (Equity)	0	6	0	6
Z Category (Equity)	3	18	2	23
Mutual Funds	0	31	4	35
Corporate Bonds	0	2	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,040,989	5,090,131	-1.0%
	Mn USD	53,661	54,184	
Turnover	Mn BDT	3,194	5,153	-38.0%
	Mn USD	34	55	
Volume	Mn Shares	101	134	-24.9%
No. of Trade		76,197	115,352	-33.9%

* Exchange Rate is BDT 93.94 as of Jul 19, 2022

Figure: Sectorial Turnover (BDT)

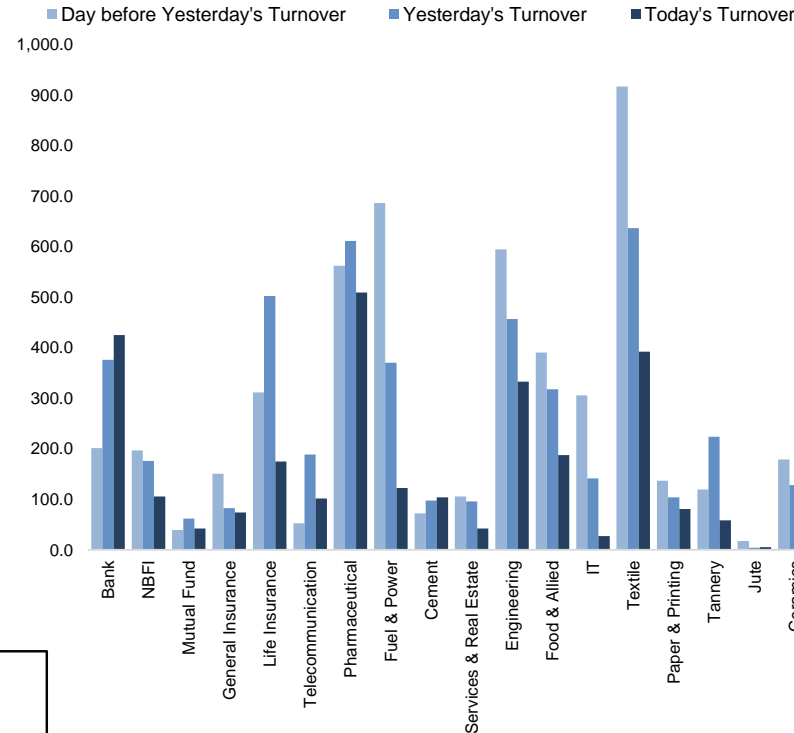
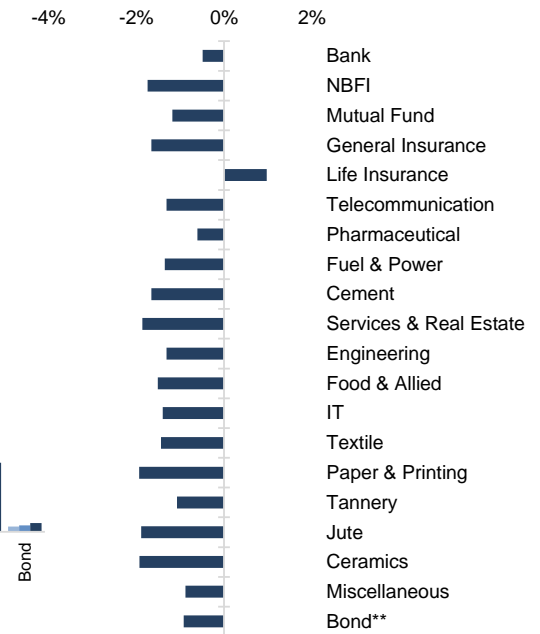


Figure: Sectorial Mcap Change



Market PE 15.4x
Market PB 1.7x

Fahim Hassan Research Associate (880) 1709636546 fahim.hassan@bracepl.com	Billal Hossain Research Associate (880) 1708805229 billal.hossain@bracepl.com
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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	1,416	1,423	-6.93	-0.49%	33	653,324	14.8%	425.1	14.2%	7.7x	0.8x	GP	386,591	8.7%	77.2	11.4x	7.7x
NBFI	1,929	1,964	-34.18	-1.74%	23	190,040	4.3%	105.9	3.5%	NM	3.5x	WALTONHIL	320,650	7.2%	4.1	22.4x	3.3x
Mutual Fund	855	865	-10.20	-1.18%	36	37,660	0.9%	42.1	1.4%	NM	0.8x	BATBC	281,340	6.4%	103.9	18.4x	8.6x
General Insurance	3,125	3,178	-52.67	-1.66%	41	92,366	2.1%	74.0	2.5%	14.7x	1.5x	SQURPHARMA	188,637	4.3%	68.6	10.2x	1.9x
Life Insurance	2,337	2,314	+22.52	+0.97%	13	67,342	1.5%	175.0	5.9%	NM	NM	ROBI	167,090	3.8%	1.8	91.1x	2.5x
Telecommunication	5,006	5,072	-66.47	-1.31%	3	589,399	13.3%	101.4	3.4%	15.4x	4.6x	RENATA	139,844	3.2%	8.5	25.3x	4.9x
Pharmaceutical	3,683	3,705	-22.54	-0.61%	32	691,587	15.6%	509.1	17.0%	17.0x	2.5x	UPGDCL	139,649	3.2%	15.2	11.3x	4.3x
Fuel & Power	1,773	1,798	-24.25	-1.35%	23	462,898	10.5%	122.1	4.1%	11.6x	1.2x	BEXIMCO	106,122	2.4%	33.4	7.4x	1.4x
Cement	2,351	2,391	-39.50	-1.65%	7	113,319	2.6%	103.6	3.5%	24.0x	2.5x	BERGERPBL	81,022	1.8%	5.7	27.9x	7.7x
Services & Real Estate	1,352	1,378	-25.62	-1.86%	8	51,146	1.2%	42.1	1.4%	71.2x	1.0x	ICB	76,633	1.7%	5.4	43.4x	1.7x
Engineering	4,556	4,617	-60.34	-1.31%	42	533,506	12.0%	332.5	11.1%	18.5x	1.9x	LHBL	76,418	1.7%	51.5	20.2x	4.3x
Food & Allied	21,263	21,588	-325.05	-1.51%	21	377,583	8.5%	187.2	6.3%	23.1x	8.8x	MARICO	75,033	1.7%	9.5	21.1x	27.9x
IT	2,542	2,579	-36.06	-1.40%	11	32,575	0.7%	26.9	0.9%	26.5x	2.3x	BXPBARMA	64,954	1.5%	82.7	11.3x	1.6x
Textile	1,561	1,584	-22.73	-1.43%	58	168,415	3.8%	392.1	13.1%	25.3x	1.0x	BEACONPHAR	58,374	1.3%	6.6	62.4x	10.0x
Paper & Printing	7,572	7,721	-149.19	-1.93%	6	27,716	0.6%	81.0	2.7%	NM	1.9x	BRACBANK	56,870	1.3%	36.8	10.7x	1.0x
Tannery	3,091	3,124	-33.34	-1.07%	6	33,006	0.7%	58.5	2.0%	46.6x	3.3x	ISLAMIBANK	52,969	1.2%	13.3	10.8x	0.8x
Jute	8,692	8,859	-166.98	-1.88%	3	2,003	0.0%	5.1	0.2%	NM	28.3x	DUTCHBANGL	44,041	1.0%	4.7	7.6x	1.2x
Ceramics	742	757	-14.57	-1.92%	5	33,098	0.7%	48.7	1.6%	31.0x	2.0x	TITASGAS	43,625	1.0%	5.0	13.0x	0.6x
Miscellaneous	4,224	4,261	-37.52	-0.88%	15	234,216	5.3%	137.0	4.6%	11.5x	2.0x	POWERGRID	39,485	0.9%	22.2	10.8x	0.4x
Bond**	88	89	-0.82	-0.92%	9	36,512	0.8%	17.4	0.6%	NM	NM	SUMITPOWER	38,230	0.9%	8.3	9.1x	1.1x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BIFC	7.9	+8.2%	8.8	NM	NM
NATLIFEINS	189.0	+7.8%	0.4	NM	NM
MITHUNKNIT	19.5	+6.6%	15.4	NM	6.1x
ARAMITCEM	34.2	+5.9%	32.0	NM	1.6x
UNITEDINS	46.7	+4.7%	0.0	27.8x	1.3x
HRTEX	106.2	+4.5%	74.6	33.7x	2.5x
KDSALTD	67.3	+4.0%	101.9	29.2x	2.7x
SAVAREFR	255.7	+3.9%	7.8	NM	3652.9x
DAFODILCOM	68.0	+2.6%	0.0	91.9x	5.1x
OIMEX	19.3	+1.6%	10.3	NM	1.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	123,425	7.4%	10.2x	1.9x
BATBC	74,414	4.5%	18.4x	8.6x
BEXIMCO	70,730	4.3%	7.4x	1.4x
RENATA	68,146	4.1%	25.3x	4.9x
BXPBARMA	45,351	2.7%	11.3x	1.6x
BEACONPHAR	40,862	2.5%	62.4x	10.0x
GP	38,659	2.3%	11.4x	7.7x
BRACBANK	30,573	1.8%	10.7x	1.0x
LHBL	26,991	1.6%	20.2x	4.3x
ISLAMIBANK	25,785	1.6%	10.8x	0.8x
EBL	24,125	1.5%	7.2x	1.0x
NBL	18,883	1.1%	NM	0.5x
PUBALIBANK	17,962	1.1%	5.7x	0.6x
CITYBANK	17,857	1.1%	5.0x	0.8x
ROBI	16,709	1.0%	91.1x	2.5x
OLYMPIC	15,122	0.9%	16.4x	2.6x
ALARABANK	14,857	0.9%	11.0x	1.1x
BSRMLTD	14,706	0.9%	5.1x	0.7x
SUMITPOWER	14,065	0.8%	9.1x	1.1x
UPGDCL	13,965	0.8%	11.3x	4.3x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BATBC	521.0	-1.4%	103.9	18.4x	8.6x
KDSALTD	67.3	+4.0%	101.9	29.2x	2.7x
BXPBARMA	145.6	+0.2%	82.7	11.3x	1.6x
GP	286.3	-1.1%	77.2	11.4x	7.7x
SUNLIFEINS	55.9	+0.7%	76.2	NM	NM
HRTEX	106.2	+4.5%	74.6	33.7x	2.5x
NBL	8.2	-	73.2	NM	0.5x
SONALIPAPR	616.2	-2.0%	68.8	43.5x	2.5x
SQURPHARMA	212.8	-0.2%	68.6	10.2x	1.9x
ORIONINFU	98.4	-1.8%	60.3	58.4x	7.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GQBALLPEN	107.8	-2.0%	1.1	NM	0.8x
BDLAMPS	264.6	-2.0%	18.8	33.5x	2.9x
RAHIMAFOD	254.9	-2.0%	3.1	NM	27.8x
KAY&QUE	240.2	-2.0%	1.9	NM	3.2x
DELTALIFE	147.2	-2.0%	56.1	NM	NM
EASTRNLU	1,997.6	-2.0%	1.4	NM	13.1x
LIBRAINFU	982.0	-2.0%	24.2	NM	0.8x
SEAPEARL	44.2	-2.0%	10.4	92.5x	3.8x
EASTERNINS	54.1	-2.0%	0.4	10.7x	1.0x
BAYLEASING	24.6	-2.0%	2.0	8.6x	1.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FORTUNE	92.8	83.3	13.0	571	51.79
PRIMEINSUR	93.0	93.0	5.0	541	50.31
SUNLIFEINS	55.0	55.0	3.0	290	15.95
HRTEX	103.9	102.0	10.0	153	15.73
IPDC	60.0	60.0	1.0	200	12.00
LOVELLO	39.9	39.0	4.0	240	9.45
KDSALTD	65.0	65.0	1.0	100	6.50
BSC	106.9	106.9	2.0	55	5.88
BEACONPHAR	253.0	253.0	1.0	17	4.23
BEXIMCO	135.8	134.0	2.0	26	3.52

*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
FORTUNE	92.8	83.3	51.8	571	13
PRIMEINSUR	93.0	93.0	50.3	541	5
SUNLIFEINS	55.0	55.0	16.0	290	3
HRTEX	103.9	102.0	15.7	153	10
IPDC	60.0	60.0	12.0	200	1
LOVELLO	39.9	39.0	9.4	240	4
KDSALTD	65.0	65.0	6.5	100	1
BSC	106.9	106.9	5.9	55	2
BEACONPHAR	253.0	253.0	4.2	17	1
BEXIMCO	135.8	134.0	3.5	26	2
BATBC	521.2	521.2	3.4	6	1
ADNTEL	64.9	64.9	2.9	45	1
DELTALIFE	147.3	147.3	2.8	19	1
BXPHARMA	142.9	142.9	2.3	16	1
FAREASTLIF	84.4	77.7	2.1	26	3
BDFINANCE	47.1	47.1	1.7	36	1
GSPFINANCE	32.0	31.7	1.5	48	2
TITASGAS	44.1	44.1	1.3	30	1
BDCOM	33.1	32.5	1.2	37	2
POPULARLIF	64.8	64.8	1.2	19	1
SONALILIFE	56.0	56.0	1.1	20	1
BDTHAI	19.2	19.2	1.1	55	1
Total			206.7		70

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
Grameenphone Ltd.	-	0.0%	125.0%	Record Date	10-Aug-22
Rupali Life Insurance Company Limited	-	0.0%	18.0%	Record Date	17-Aug-22

Important DSE News
PADMALIFE

(Q2 Un-audited): Decrease in life revenue account for Apr-June, 2022 was Tk. 7.76 million with total life insurance fund of Tk. 123.95 million as against decrease in Tk. 16.75 million and Tk. 124.78 million respectively for the same period of the previous year. Decrease in life revenue account for Jan-June, 2022 was Tk. 0.68 million with total life insurance fund of Tk. 123.95 million as against decrease in Tk. 6.63 million and Tk. 124.78 million respectively for the same period of the previous year.

PAPERPROC

Referring to the BSEC letter No. SEC/SRMIC/94-31/181 dated April 28, 2022, Bangladesh Development Group Ltd., one of the Corporate Directors of the Company, has expressed its intention to sell 4,36,000 shares out of its holding 9,90,970 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days.

MONOSPOOL

Referring to the BSEC letter No. SEC/SRMIC/94-22/179 dated April 28, 2022, Magura Group Ltd., one of the Corporate Directors of the Company, has expressed its intention to sell 2,09,410 shares out of its holding 8,09,372 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days.

OLYMPIC

Referring to the BSEC letter No. SEC/SRMIC/94-109/part-VI/280 dated November 14, 2021, the company has informed that Mrs. Safinaz Bhai, one of the Directors of the company passed away on 05.01.2020. Her total holding of 25,24,070 shares will be transmitted among her successors according to the Succession Certificate issued by the Honorable Court.

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