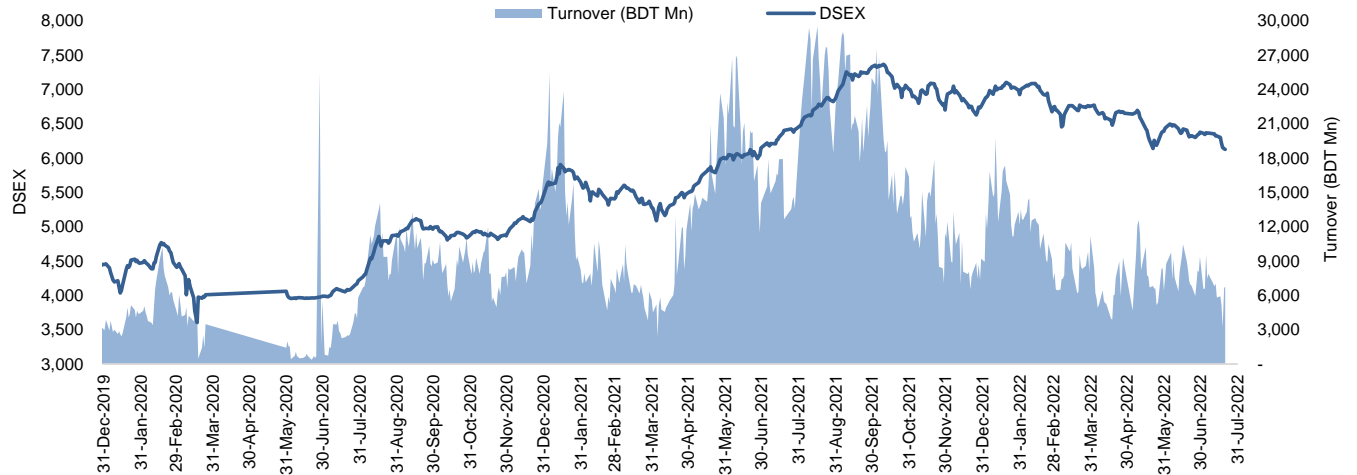


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.20%) lost 12.27 points and closed at 6,126.52. The blue-chip index DS30 (-0.24%), the Shariah-based index DSES (-0.09%), and the large-cap index CDSET (-0.11%) closed at 2,200.83, 1,345.09, and 1,215.56 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 0.62% followed by Engineering (+0.28%), Bank (+0.26%), Food & Allied (+0.21%). Fuel & Power experienced the highest loss of 0.46% followed by NBFI (-0.13%), Pharmaceutical (-0.11%). Block trades contributed 1.2% of the overall market turnover. Sonali Paper & Board Mills Ltd. (+3.6%) was the most traded share with a turnover of BDT 402 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,126.52	6,138.79	-12.27	-0.20%	-9.3%
DS30	2,200.83	2,206.08	-5.25	-0.24%	-13.1%
DSES	1,345.09	1,346.26	-1.17	-0.09%	-6.0%
CDSET	1,215.56	1,216.88	-1.32	-0.11%	-10.6%

	Advanced	Declined	Unchanged	Total
All Category	115	219	47	381
A Category (Equity)	77	150	37	264
B Category (Equity)	25	54	9	88
N Category (Equity)	1	5	0	6
Z Category (Equity)	12	10	1	23
Mutual Funds	11	6	18	35
Corporate Bonds	1	0	1	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,031,190	5,028,463	
	Mn USD	53,552	53,523	+0.1%
Turnover	Mn BDT	6,769	6,656	+1.7%
	Mn USD	72	71	
Volume	Mn Shares	180	167	+7.9%
No. of Trade		141,825	137,857	+2.9%

* Exchange Rate is BDT 93.95 as of Jul 21, 2022

Figure: Sectorial Turnover (BDT)

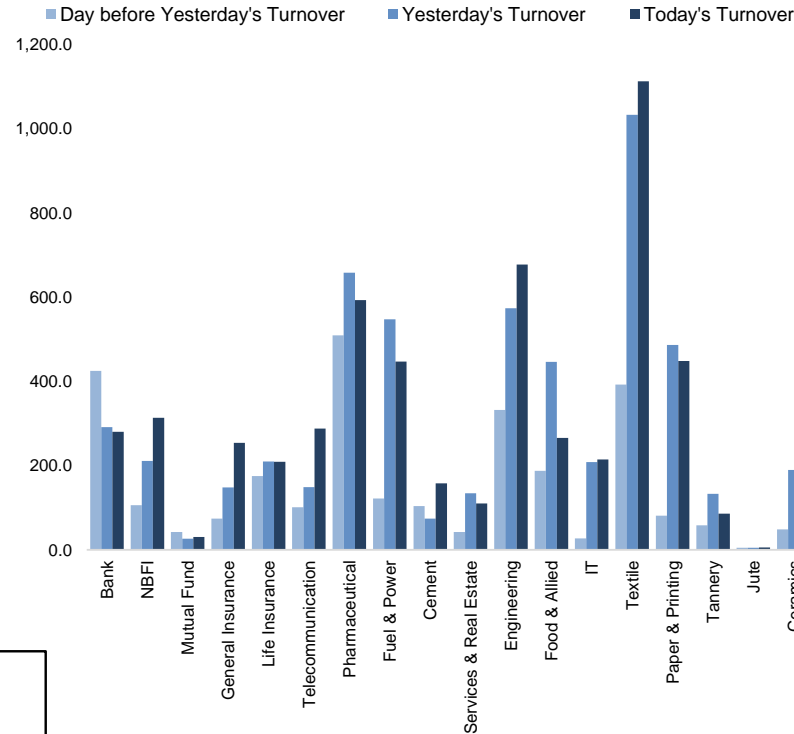
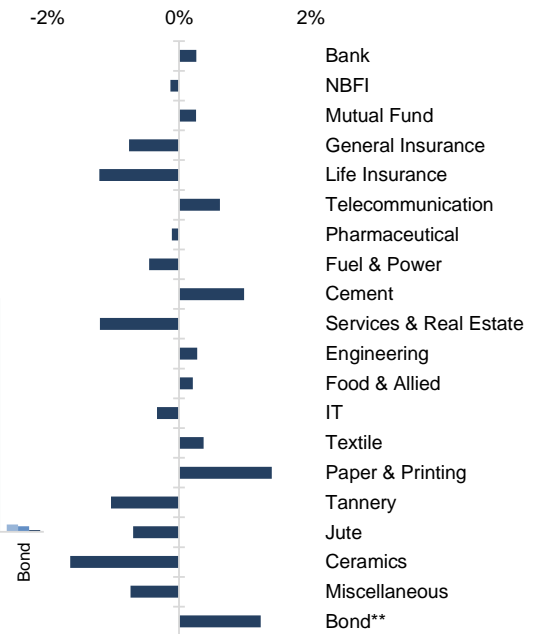


Figure: Sectorial Mcap Change



Market PE 15.3x
Market PB 1.7x

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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	1,422	1,419	+3.75	+0.26%	33	656,003	14.8%	280.2	4.5%	7.8x	0.8x	GP	387,671	8.8%	31.8	11.4x	7.7x
NBFI	1,934	1,936	-2.49	-0.13%	23	190,485	4.3%	313.7	5.0%	NM	3.5x	WALTONHIL	321,256	7.3%	2.2	22.5x	3.3x
Mutual Fund	858	856	+2.22	+0.26%	36	37,818	0.9%	30.6	0.5%	NM	0.8x	BATBC	282,636	6.4%	55.5	18.5x	8.6x
General Insurance	3,057	3,080	-23.32	-0.76%	41	90,347	2.0%	254.0	4.1%	14.4x	1.5x	SQURPHARMA	188,105	4.3%	67.1	10.2x	1.9x
Life Insurance	2,274	2,302	-27.89	-1.21%	13	65,524	1.5%	208.8	3.4%	NM	NM	ROBI	166,566	3.8%	237.2	90.9x	2.5x
Telecommunication	5,018	4,987	+31.08	+0.62%	3	590,863	13.4%	288.1	4.6%	15.5x	4.6x	RENATA	140,123	3.2%	11.8	25.3x	4.9x
Pharmaceutical	3,686	3,690	-4.05	-0.11%	32	692,242	15.7%	593.0	9.5%	17.1x	2.5x	UPGDCL	138,257	3.1%	2.7	11.2x	4.2x
Fuel & Power	1,746	1,754	-7.98	-0.46%	23	455,830	10.3%	447.1	7.2%	11.4x	1.2x	BEXIMCO	102,179	2.3%	236.9	7.1x	1.3x
Cement	2,372	2,349	+23.21	+0.99%	7	114,315	2.6%	158.0	2.5%	24.9x	2.5x	BERGERPBL	80,466	1.8%	3.0	27.7x	7.6x
Services & Real Estate	1,324	1,340	-16.08	-1.20%	8	50,054	1.1%	110.1	1.8%	69.7x	1.0x	LHBL	77,580	1.8%	123.0	19.9x	4.4x
Engineering	4,556	4,544	+12.66	+0.28%	42	533,519	12.1%	677.3	10.9%	18.6x	1.9x	ICB	76,955	1.7%	2.3	43.6x	1.7x
Food & Allied	21,273	21,228	+44.97	+0.21%	21	377,757	8.6%	266.0	4.3%	23.1x	8.8x	MARICO	76,425	1.7%	24.6	21.5x	28.4x
IT	2,516	2,525	-8.44	-0.33%	11	32,240	0.7%	214.4	3.4%	26.2x	2.3x	BXPBARMA	65,222	1.5%	40.2	11.4x	1.6x
Textile	1,574	1,568	+5.85	+0.37%	58	169,784	3.8%	1,112.7	17.9%	25.5x	1.0x	BRACBANK	57,768	1.3%	25.9	10.9x	1.1x
Paper & Printing	7,641	7,535	+106.10	+1.41%	6	27,972	0.6%	448.6	7.2%	NM	1.9x	BEACONPHAR	57,658	1.3%	8.6	61.6x	9.9x
Tannery	3,034	3,066	-31.65	-1.03%	6	32,400	0.7%	85.5	1.4%	45.8x	3.2x	ISLAMIBANK	53,130	1.2%	9.1	10.9x	0.8x
Jute	8,630	8,690	-60.52	-0.70%	3	1,989	0.0%	5.7	0.1%	NM	28.1x	DUTCHBANGL	43,763	1.0%	3.0	7.6x	1.1x
Ceramics	721	733	-12.11	-1.65%	5	32,136	0.7%	161.9	2.6%	30.1x	1.9x	TITASGAS	42,042	1.0%	154.1	12.6x	0.6x
Miscellaneous	4,142	4,172	-30.72	-0.74%	15	229,666	5.2%	554.1	8.9%	11.3x	1.9x	POWERGRID	38,273	0.9%	14.8	10.4x	0.4x
Bond**	89	88	+1.09	+1.24%	9	36,696	0.8%	4.1	0.1%	NM	NM	SUMITPOWER	37,589	0.9%	8.2	9.0x	1.0x

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
SALAMCRST	33.3	+9.9%	33.6	83.3x	1.8x	SQURPHARMA	123,077	7.4%	10.2x	1.9x	SONALIPAPR	639.7	+3.6%	401.8	45.2x	2.6x
BIFC	9.4	+9.3%	11.0	NM	NM	BATBC	74,757	4.5%	18.5x	8.6x	ROBI	31.8	+1.6%	237.2	90.9x	2.5x
NEWLINE	46.2	+7.9%	1.1	24.5x	1.9x	RENATA	68,282	4.1%	25.3x	4.9x	BEXIMCO	116.6	-1.9%	236.9	7.1x	1.3x
FAREASTFIN	5.6	+7.7%	0.8	NM	4.9x	BEXIMCO	68,102	4.1%	7.1x	1.3x	KDSALTD	74.5	+5.4%	172.5	32.3x	3.0x
PRIMETEX	41.7	+7.5%	129.9	13.0x	0.6x	BXPBARMA	45,538	2.8%	11.4x	1.6x	TITASGAS	42.5	-1.8%	154.1	12.6x	0.6x
YPL	20.2	+7.4%	105.2	NM	1.8x	BEACONPHAR	40,360	2.4%	61.6x	9.9x	IPDC	59.5	+1.2%	145.0	24.6x	3.4x
SAVAREFR	274.2	+7.4%	9.1	NM	3917x	GP	38,767	2.3%	11.4x	7.7x	PRIMEINSUR	87.8	-1.3%	144.9	40.1x	4.5x
HRTEX	123.1	+7.0%	75.8	39.0x	2.9x	BRACBANK	31,056	1.9%	10.9x	1.1x	PRIMETEX	41.7	+7.5%	129.9	13.0x	0.6x
MEGCONMILK	39.7	+5.9%	15.9	NM	NM	LHBL	27,401	1.7%	19.9x	4.4x	ORIONINFU	107.1	+1.5%	128.4	63.6x	7.9x
KDSALTD	74.5	+5.4%	172.5	32.3x	3.0x	ISLAMIBANK	25,864	1.6%	10.9x	0.8x	LHBL	66.8	+2.0%	123.0	19.9x	4.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	19,113	1.2%	NM	0.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ASIAPACINS	44.1	-2.0%	1.6	18.8x	1.9x	PUBALIBANK	17,962	1.1%	5.7x	0.6x	PADMALIFE	53.5	53.5	11.0	2,574	137.73
EASTRNLU	1,918.6	-2.0%	16.5	NM	12.6x	CITYBANK	17,776	1.1%	5.0x	0.8x	FORTUNE	88.0	82.0	5.0	1,394	114.41
NATLIFEINS	181.6	-2.0%	0.3	NM	NM	ROBI	16,657	1.0%	90.9x	2.5x	PRIMEINSUR	89.9	89.0	5.0	1,050	93.90
DSHGARME	152.3	-2.0%	3.9	NM	7.5x	ALARABANK	14,919	0.9%	11.0x	1.1x	BNICL	62.4	62.4	1.0	1,000	62.40
ECABLES	187.1	-2.0%	24.1	NM	22.6x	OLYMPIC	14,696	0.9%	16.0x	2.6x	IPDC	58.5	58.0	4.0	515	30.02
PAPERPROC	172.6	-2.0%	21.7	56.6x	5.8x	BSRMLTD	14,609	0.9%	5.0x	0.7x	AL-HAJTEX	128.2	125.7	12.0	210	26.57
SHYAMPSUG	104.0	-2.0%	2.6	NM	NM	SUMITPOWER	13,829	0.8%	9.0x	1.0x	CNATEX	10.3	10.1	7.0	2,357	23.83
HEIDELBCEM	188.2	-2.0%	0.7	NM	3.0x	UPGDCL	13,826	0.8%	11.2x	4.2x	BATBC	521.0	521.0	1.0	25	13.03
CVOPRL	168.8	-2.0%	21.5	NM	19.6x						GENEXIL	72.7	72.7	1.0	165	12.00
GENEXIL	69.6	-2.0%	44.8	20.5x	3.8x						METROSPIN	26.1	25.0	2.0	255	6.56

*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
PADMALIFE	53.5	53.5	137.7	2,574	11
FORTUNE	88.0	82.0	114.4	1,394	5
PRIMEINSUR	89.9	89.0	93.9	1,050	5
BNICL	62.4	62.4	62.4	1,000	1
IPDC	58.5	58.0	30.0	515	4
AL-HAJTEX	128.2	125.7	26.6	210	12
CNATEX	10.3	10.1	23.8	2,357	7
BATBC	521.0	521.0	13.0	25	1
GENEXIL	72.7	72.7	12.0	165	1
METROSPIN	26.1	25.0	6.6	255	2
HRTEX	117.0	112.8	5.7	49	5
LHBL	70.5	70.5	4.2	60	1
FUWANGFOOD	26.2	26.2	3.1	120	1
BEXIMCO	121.0	121.0	3.0	25	1
PRIMETEX	38.2	38.1	2.9	77	2
YPL	18.9	18.9	2.5	130	2
TITASGAS	43.3	42.6	2.3	54	2
GBBPOWER	21.0	20.6	1.9	91	2
MONNOFABR	26.0	26.0	1.4	53	2
GRAMEENS2	16.5	16.5	1.1	64	1
DELTALIFE	147.9	147.9	1.0	7	1
LOVELLO	38.0	38.0	0.9	23	1
Total			555.3		78

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
LafargeHolcim Bangladesh Limited	-	0.0%	15.0%	Record Date	11-Aug-22
Rupali Life Insurance Company Limited	-	0.0%	18.0%	Record Date	17-Aug-22

Important DSE News
LHBL

The Board of Directors of the Company has declared 15% interim cash dividend based on 6 months financials for the period ended June 30, 2022. Record date for entitlement of interim cash dividend: 11.08.2022.

(Q2 Un-audited): Consolidated EPS was Tk. 1.06 for April-June 2022 as against Tk. 0.96 for April-June 2021; Consolidated EPS was Tk. 1.87 for January-June 2022 as against Tk. 1.85 for January-June 2021. Consolidated NOCFPS was Tk. 2.46 for January-June 2022 as against Tk. 2.82 for January-June 2021. Consolidated NAV per share was Tk. 16.41 as on June 30, 2022 and Tk. 17.04 as on December 31, 2021.

RAKCERAMIC

The Company has informed that the Board of Directors has decided to invest in faucets business by establishing a new plant with production capacity of 1,500 pcs per day at an estimated investment of BDT 950.00 million.

(Q2 Un-audited): Consolidated EPS was Tk. 0.44 for April-June 2022 as against Tk. 0.52 for April-June 2021; Consolidated EPS was Tk. 1.01 for January-June 2022 as against Tk. 1.02 for January-June 2021. Consolidated NOCFPS was Tk. 0.03 for January-June 2022 as against Tk. 0.51 for January-June 2021. Consolidated NAV per share was Tk. 17.28 as on June 30, 2022 and Tk. 16.43 as on June 30, 2021. The Company has informed that sales is increased by 16.35% from Tk. 3,268.70 mn to Tk. 3,803.03 mn. However, settlement of multiple import bills in the reporting period causing vendor payment was more compare to collection. As a result, NOCFPS has been decreased.

ISLAMIBANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.58 for April-June 2022 as against Tk. 1.61 for April-June 2021; Consolidated EPS was Tk. 2.10 for January-June 2022 as against Tk. 2.08 for January-June 2021. Consolidated NOCFPS was Tk. (12.29) for January-June 2022 as against Tk. 37.76 for January-June 2021. Consolidated NAV per share was Tk. 41.73 as on June 30, 2022 and Tk. 39.97 as on June 30, 2021.

HEIDELBCEM

(Q2 Un-audited): EPS was Tk. (0.66) for April-June 2022 as against Tk. 3.56 for April-June 2021; EPS was Tk. (3.63) for January-June 2022 as against Tk. 11.79 for January-June 2021. NOCFPS was Tk. (5.34) for January-June 2022 as against Tk. 5.73 for January-June 2021. NAV per share was Tk. 60.37 as on June 30, 2022 and Tk. 66.60 as on December 31, 2021.

PROVATIINS

(Q2 Un-audited): EPS was Tk. 0.54 for April-June 2022 as against Tk. 0.74 for April-June 2021; EPS was Tk. 1.93 for January-June 2022 as against Tk. 1.82 for January-June 2021. NOCFPS was Tk. 2.47 for January-June 2022 as against Tk. 4.09 for January-June 2021. NAV per share was Tk. 23.99 as on June 30, 2022 and Tk. 19.86 as on June 30, 2021.

FIRSTSBANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.34 for April-June 2022 as against Tk. 0.20 for April-June 2021; Consolidated EPS was Tk. 0.87 for January-June 2022 as against Tk. 0.49 for January-June 2021. Consolidated NOCFPS was Tk. 11.01 for January-June 2022 as against Tk. (1.71) for January-June 2021. Consolidated NAV per share was Tk. 19.81 as on June 30, 2022 and Tk. 17.65 as on June 30, 2021.

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