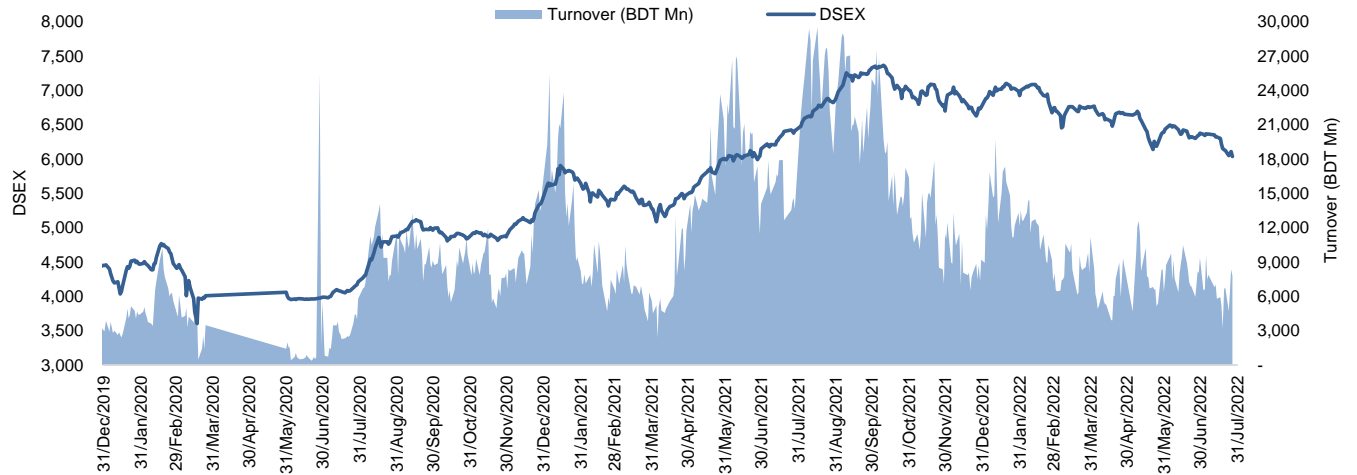


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.21%) lost 74.24 points and closed at 6,038.00. The blue-chip index DS30 (-1.24%), the Shariah-based index DSES (-1.06%), and the large-cap index CDSET (-1.14%) closed at 2,162.85, 1,319.84, and 1,199.38 points, respectively. All the large-cap sectors posted negative performance today. NBFI experienced the highest loss of 1.67% followed by Engineering (-1.26%), Food & Allied (-1.20%), Fuel & Power (-1.08%), Bank (-1.02%), Pharmaceutical (-0.85%), and Telecommunication (-0.55%), respectively. Block trades contributed 1.0% of the overall market turnover. KDS Accessories Limited (-0.6%) was the most traded share with a turnover of BDT 301 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,038.00	6,112.25	-74.24	-1.21%	-10.6%
DS30	2,162.85	2,190.02	-27.17	-1.24%	-14.6%
DSES	1,319.84	1,333.98	-14.14	-1.06%	-7.8%
CDSET	1,199.38	1,213.25	-13.87	-1.14%	-11.8%

	Advanced	Declined	Unchanged	Total
All Category	17	338	25	380
A Category (Equity)	15	224	22	261
B Category (Equity)	1	89	0	90
N Category (Equity)	0	6	0	6
Z Category (Equity)	1	19	3	23
Mutual Funds	4	14	16	34
Corporate Bonds	1	2	0	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	4,961,475	5,007,341	
	Mn USD	52,391	52,876	-0.9%
Turnover	Mn BDT	7,784	8,381	
	Mn USD	82	88	-7.1%
Volume	Mn Shares	236	224	+5.6%
No. of Trade		118,502	191,090	-38.0%

* Exchange Rate is BDT 94.70 as of Jul 27, 2022

Figure: Sectorial Turnover (BDT)

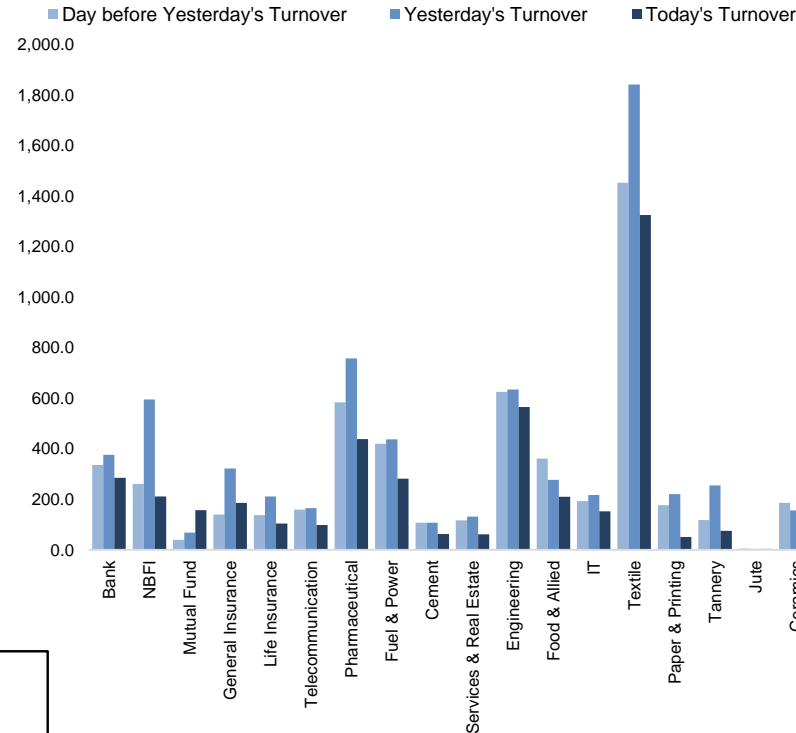
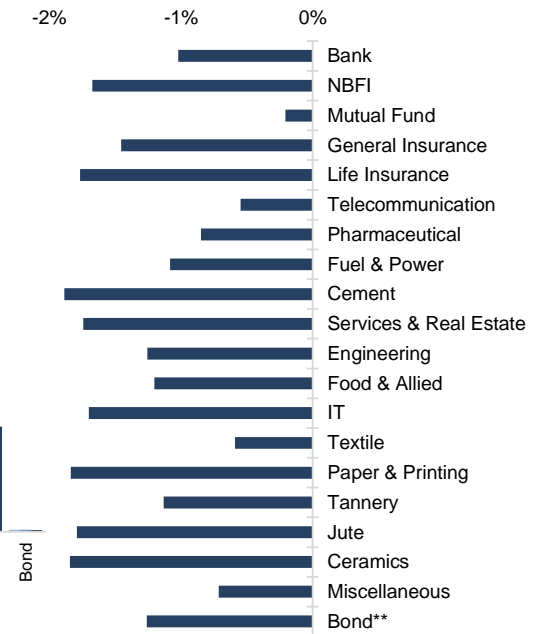


Figure: Sectorial Mcap Change



Market PE 15.1x
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	1,405	1,420	-14.49	-1.02%	33	648,237	14.9%	285.0	6.0%	7.6x	0.7x	GP	386,591	8.9%	27.5	11.4x	7.7x
NBFI	1,896	1,928	-32.27	-1.67%	23	186,742	4.3%	210.8	4.4%	NM	3.5x	WALTONHIL	316,530	7.3%	2.1	22.1x	3.2x
Mutual Fund	864	866	-1.78	-0.21%	36	38,089	0.9%	157.3	3.3%	NM	0.8x	BATBC	279,126	6.4%	63.7	18.3x	8.5x
General Insurance	3,065	3,110	-45.24	-1.45%	41	90,589	2.1%	186.0	3.9%	14.6x	1.5x	SQURPHARMA	186,066	4.3%	52.4	10.0x	1.9x
Life Insurance	2,220	2,260	-39.89	-1.77%	13	63,968	1.5%	103.7	2.2%	NM	NM	ROBI	154,519	3.6%	53.6	84.3x	2.3x
Telecommunication	4,902	4,929	-26.97	-0.55%	3	577,175	13.3%	98.4	2.1%	15.1x	4.5x	RENATA	139,758	3.2%	5.6	25.2x	4.9x
Pharmaceutical	3,647	3,678	-31.22	-0.85%	32	684,891	15.8%	438.7	9.2%	16.9x	2.4x	UPGDCL	135,185	3.1%	2.8	10.9x	4.1x
Fuel & Power	1,699	1,718	-18.60	-1.08%	23	443,570	10.2%	281.4	5.9%	11.1x	1.1x	BEXIMCO	101,390	2.3%	264.2	7.1x	1.3x
Cement	2,294	2,338	-44.09	-1.89%	7	110,563	2.5%	61.9	1.3%	24.1x	2.4x	BERGERPBL	80,424	1.9%	0.7	27.7x	7.6x
Services & Real Estate	1,302	1,325	-23.09	-1.74%	8	49,228	1.1%	61.7	1.3%	68.5x	0.9x	MARICO	76,167	1.8%	4.2	21.7x	33.1x
Engineering	4,477	4,534	-56.94	-1.26%	42	524,207	12.1%	565.7	11.8%	18.3x	1.8x	LHBL	74,444	1.7%	46.6	19.1x	4.2x
Food & Allied	20,972	21,227	-255.21	-1.20%	21	372,407	8.6%	210.0	4.4%	22.6x	8.8x	ICB	73,652	1.7%	2.9	41.7x	1.6x
IT	2,441	2,483	-42.23	-1.70%	11	31,275	0.7%	151.9	3.2%	25.4x	2.2x	BXPBARMA	65,266	1.5%	81.4	11.4x	1.6x
Textile	1,589	1,599	-9.41	-0.59%	58	171,428	3.9%	1,324.9	27.7%	25.8x	1.1x	BRACBANK	57,619	1.3%	10.5	10.9x	1.1x
Paper & Printing	7,313	7,450	-136.95	-1.84%	6	26,769	0.6%	50.5	1.1%	NM	1.8x	BEACONPHAR	55,879	1.3%	5.3	59.7x	9.6x
Tannery	3,020	3,055	-34.56	-1.13%	6	32,252	0.7%	74.6	1.6%	45.6x	3.2x	ISLAMIBANK	52,486	1.2%	1.6	10.8x	0.8x
Jute	8,387	8,540	-152.95	-1.79%	3	1,933	0.0%	4.1	0.1%	NM	27.3x	DUTCHBANGL	43,693	1.0%	6.8	7.5x	1.1x
Ceramics	706	719	-13.26	-1.84%	5	31,468	0.7%	90.9	1.9%	29.5x	1.9x	TITASGAS	39,965	0.9%	118.4	12.0x	0.6x
Miscellaneous	4,102	4,131	-29.46	-0.71%	15	227,449	5.2%	416.1	8.7%	11.2x	1.9x	POWERGRID	37,133	0.9%	30.6	10.1x	0.4x
Bond**	87	88	-1.11	-1.26%	9	36,059	0.8%	6.7	0.1%	NM	NM	SUMITPOWER	36,201	0.8%	7.9	8.6x	1.0x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PF1STMF	11.5	+6.5%	49.6	NM	2.0x
ENVOYTEX	45.2	+6.1%	8.5	21.4x	1.1x
DULAMIACOT	73.9	+4.4%	0.0	NM	NM
UNITEDINS	47.7	+3.5%	0.1	28.4x	1.4x
MATINSPINN	80.2	+3.0%	270.9	7.8x	1.4x
CAPMBDBLMF	10.5	+2.9%	3.1	NM	1.2x
SQUARETEXT	70.5	+2.6%	167.3	8.1x	2x
AL-HAJTEX	136.6	+1.9%	48.7	NM	15.3x
KTL	24.9	+1.6%	148.9	50.7x	1.5x
BERGERPBL	1,734.1	+1.6%	0.7	27.7x	7.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ALLTEX	24.5	-2.0%	10.8	NM	4.1x
USMANIAGL	73.5	-2.0%	1.4	68.7x	1x
RINGSHINE	9.8	-2.0%	26.6	NM	0.6x
CONFIDCEM	93.2	-2.0%	3.2	10.5x	1.2x
EASTRNLAB	1,841.6	-2.0%	5.6	NM	12.1x
CVOPRL	162.1	-2.0%	17.7	NM	18.8x
LIBRAINFU	869.6	-2.0%	4.7	NM	0.7x
ROBI	29.5	-2.0%	53.6	84.3x	2.3x
NTC	590.2	-2.0%	4.0	NM	11.3x
MONOSPOOL	142.8	-2.0%	4.5	46.9x	3.4x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,743	7.5%	10.0x	1.9x
BATBC	73,829	4.5%	18.3x	8.5x
RENATA	68,104	4.2%	25.2x	4.9x
BEXIMCO	67,576	4.1%	7.1x	1.3x
BXPBARMA	45,569	2.8%	11.4x	1.6x
BEACONPHAR	39,115	2.4%	59.7x	9.6x
GP	38,659	2.4%	11.4x	7.7x
BRACBANK	30,976	1.9%	10.9x	1.1x
LHBL	26,294	1.6%	19.1x	4.2x
ISLAMIBANK	25,550	1.6%	10.8x	0.8x
EBL	23,901	1.5%	7.2x	1.0x
NBL	19,343	1.2%	NM	0.5x
PUBALIBANK	18,032	1.1%	5.8x	0.6x
CITYBANK	17,615	1.1%	4.6x	0.7x
ROBI	15,452	0.9%	84.3x	2.3x
ALARABANK	14,609	0.9%	10.8x	1.1x
BSRMLTD	14,465	0.9%	5.0x	0.7x
OLYMPIC	14,119	0.9%	15.4x	2.5x
UPGDCL	13,518	0.8%	10.9x	4.1x
SUMITPOWER	13,318	0.8%	8.6x	1.0x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KDSALTD	77.5	-0.6%	301.4	33.6x	3.1x
MATINSPINN	80.2	+3.0%	270.9	7.8x	1.4x
BEXIMCO	115.7	-1.9%	264.2	7.1x	1.3x
SQUARETEXT	70.5	+2.6%	167.3	8.1x	1.6x
KTL	24.9	+1.6%	148.9	50.7x	1.5x
TITASGAS	40.4	-1.9%	118.4	12.0x	0.6x
BXPBARMA	146.3	-1.9%	81.4	11.4x	1.6x
IPDC	57.4	-1.9%	80.8	23.3x	3.4x
ORIONINFU	106.8	-1.9%	65.1	63.4x	7.9x
BATBC	516.9	-1.0%	63.7	18.3x	8.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ISLAMIBANK	32.1	32.1	2.0	84,564	2,714.50
FORTUNE	90.0	80.3	7.0	767	64.32
IPDC	58.5	57.4	6.0	781	45.03
AL-HAJTEX	135.0	131.4	14.0	287	37.88
TRUSTBANK	34.5	34.5	3.0	1,000	34.50
ORIONINFU	108.7	106.8	5.0	201	21.59
PRIMEINSUR	81.2	81.2	1.0	200	16.24
GSPFINANCE	33.5	33.0	2.0	400	13.30
SEAPEARL	47.1	46.0	2.0	151	7.06
HRTEX	131.5	128.0	5.0	51	6.54

**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
ISLAMIBANK	32.1	32.1	2,714.5	84,564	2
FORTUNE	90.0	80.3	64.3	767	7
IPDC	58.5	57.4	45.0	781	6
AL-HAJTEX	135.0	131.4	37.9	287	14
TRUSTBANK	34.5	34.5	34.5	1,000	3
ORIONINFU	108.7	106.8	21.6	201	5
PRIMEINSUR	81.2	81.2	16.2	200	1
GSPFINANCE	33.5	33.0	13.3	400	2
SEAPEARL	47.1	46.0	7.1	151	2
HRTEX	131.5	128.0	6.5	51	5
BERGERPBL	1,706.8	1,706.8	5.1	3	1
BEXIMCO	116.7	115.7	4.7	40	2
SUNLIFEINS	59.0	58.2	4.6	79	3
RANFOUNDRY	165.5	162.9	4.3	27	2
MATINSPINN	77.0	76.4	4.0	52	2
ECABLES	182.7	182.7	2.9	16	1
SPCERAMICS	43.5	42.7	2.9	68	4
TOSRIFA	25.9	25.9	1.8	68	1
APEXFOOT	284.2	284.2	1.3	5	1
RENATA	1,307.1	1,307.1	1.3	1	1
SQRPHARMA	210.2	210.2	1.3	6	1
PHOENIXFIN	17.7	17.7	1.0	59	1
Total			3,003.8		79

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
Libra Infusions Limited	-	0.0%	5.0%	Record Date	11-Aug-22
Rupali Life Insurance Company Limited	-	0.0%	18.0%	Record Date	17-Aug-22
Marico Bangladesh Limited	-	0.0%	300.0%	Record Date	21-Aug-22

Important DSE News
CENTRALINS

(Q2 Un-audited): EPS was Tk. 0.57 for April-June 2022 as against Tk. 0.54 for April-June 2021; EPS was Tk. 1.25 for January-June 2022 as against Tk. 1.21 for January-June 2021. NOCFPS was Tk. 1.58 for January-June 2022 as against Tk. 1.13 for January-June 2021. NAV per share (with revaluation) was Tk. 48.76 as on June 30, 2022 and Tk. 49.35 as on December 31, 2021 and NAV per share (without revaluation) was Tk. 20.25 as on June 30, 2022 and Tk. 20.84 as on December 31, 2021.

DHAKABANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.57 for April-June 2022 as against Tk. 0.48 for April-June 2021; Consolidated EPS was Tk. 1.30 for January-June 2022 as against Tk. 1.13 for January-June 2021. Consolidated NOCFPS was Tk. (17.81) for January-June 2022 as against Tk. 3.98 for January-June 2021. Consolidated NAV per share was Tk. 22.16 as on June 30, 2022 and Tk. 20.97 as on June 30, 2021. The Company has informed that EPS increased due to increase of Operating Profit by 18% compared to the corresponding period of previous year. NOCFPS reduced due to increase of Loans and Advances and Investment in Treasury Bills.

DUTCHBANGL

(Q2 Un-audited): EPS was Tk. 1.97 for April-June 2022 as against Tk. 1.95 for April-June 2021; EPS was Tk. 3.58 for January-June 2022 as against Tk. 3.25 for January-June 2021. NOCFPS was Tk. 21.38 for January-June 2022 as against Tk. 21.76 for January-June 2021. NAV per share was Tk. 55.09 as on June 30, 2022 and Tk. 53.13 as on December 31, 2021. NOCFPS decreased mainly for increase of loans and advances to customers.

IPDC

(Q2 Un-audited): EPS was Tk. 0.59 for April-June 2022 as against Tk. 0.55 for April-June 2021; EPS was Tk. 1.19 for January-June 2022 as against Tk. 1.11 for January-June 2021. NOCFPS was Tk. (13.29) for January-June 2022 as against Tk. (16.92) for January-June 2021. NAV per share was Tk. 17.11 as on June 30, 2022 and Tk. 17.12 as on December 31, 2021.

MARICO

The Board of Directors of the Company has declared 300% interim cash dividend based on 3 months financials for the period ended June 30, 2022. Record date for entitlement of interim cash dividend: 21.08.2022.

(Q1 Audited): EPS was Tk. 32.67 for April-June 2022 as against Tk. 34.29 for April-June 2021; NOCFPS was Tk. 30.19 for April-June 2022 as against Tk. 27.38 for April-June 2021. NAV per share was Tk. 73.03 as on June 30, 2022 and Tk. 85.37 as on June 30, 2021.

MONNOCERA

The Company has informed that the Board of Directors of the company has decided to sell 416.50 decimal land which is totally unutilized free land situated outside of the factory boundary at Address: Mouza: Dakkhin, Dhamrai, Dhaka. The sale proceeds of Tk.20.00 crore will be utilized for downsizing the Bank liabilities of revolving BAIM (com) to Tk. 15.00 Crore and adjustment of Stimulus Package of Tk.5.00 Crore to reduce bank liability and financial Cost of the Company.

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