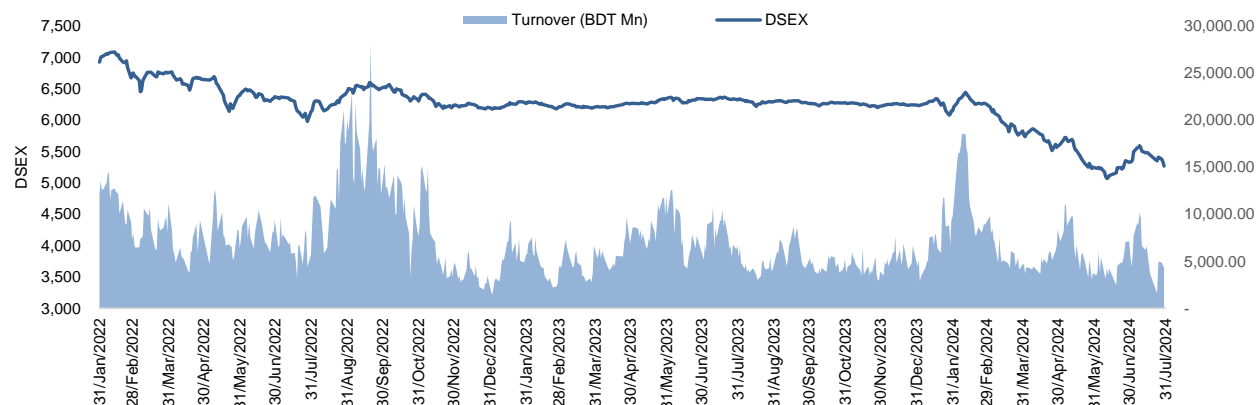


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.14%) lost 60.72 points and closed at 5,269.53. The blue-chip index DS30 (-1.10%), the Shariah-based index DSES (-1.27%), and the large-cap index CDSET (-0.81%) closed at 1,881.86, 1,151.55, and 1,018.44 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.55% followed by Engineering (-2.33%), Fuel & Power (-1.46%), Food & Allied (-1.18%), Pharmaceutical (-0.94%), Bank (-0.75%), and Telecommunication (-0.72%), respectively. Block trades contributed 4.1% of the overall market turnover. Techno Drugs Limited (+10.0%) was the most traded share with a turnover of BDT 837 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,269.53	5,330.24	-60.72	-1.14%	-15.6%
DS30	1,881.86	1,902.75	-20.89	-1.10%	-10.1%
DSES	1,151.55	1,166.42	-14.87	-1.27%	-15.6%
CDSET	1,018.44	1,026.71	-8.27	-0.81%	-15.3%

Figure: Sectorial Turnover (BDT Mn)

■ Day before Yesterday's Turnover ■ Yesterday's Turnover ■ Today's Turnover

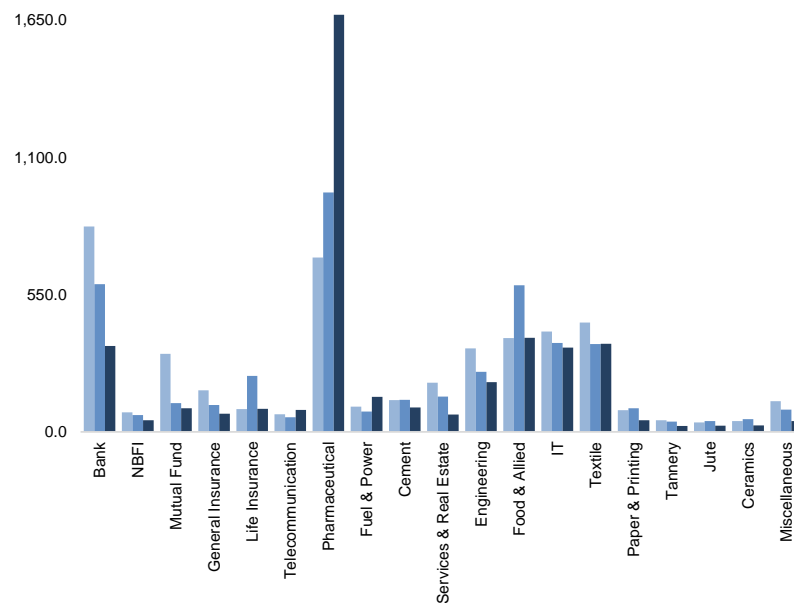
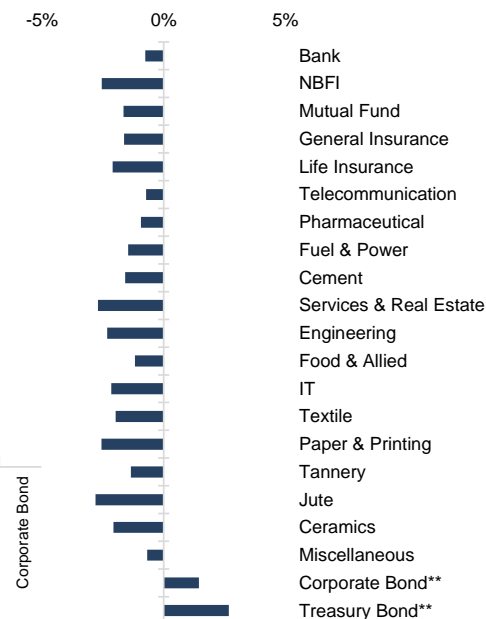


Figure: Sectorial Mcap Change



	Advanced	Declined	Unchanged	Total
All Category	25	340	32	397
A Category (Equity)	18	199	18	235
B Category (Equity)	3	97	2	102
N Category (Equity)	2	3	1	6
Z Category (Equity)	2	41	11	54
Mutual Funds	1	26	10	37
Corporate Bonds	1	0	1	2
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,480,275	6,527,484	-0.7%
	Mn USD	54,918	55,318	
Turnover	Mn BDT	4,327	4,502	-3.9%
	Mn USD	37	38	
Volume	Mn Shares	117	144	-18.6%
No. of Trade		131,991	119,674	+10.3%

* Average Interbank Exchange Rate is BDT 118.00 as of Jul 30, 2024

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Market PE 14.2x
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	1,339	1,349	-10.18	-0.75%	36	641,166	9.9%	344.6	8.3%	7.1x	0.6x	GP	338,655	9.4%	24.5	9.6x	4.7x
NBFI	1,095	1,124	-28.66	-2.55%	23	105,998	1.6%	46.6	1.1%	NM	NM	SQURPHARMA	188,725	5.2%	74.4	9.3x	1.5x
Mutual Fund	635	646	-10.70	-1.66%	37	29,678	0.5%	94.6	2.3%	NM	0.6x	WALTONHIL	178,304	5.0%	24.4	13.8x	1.6x
General Insurance	3,002	3,052	-49.71	-1.63%	43	86,952	1.3%	72.8	1.8%	15.5x	1.3x	BATBC	177,282	4.9%	55.0	10.2x	3.4x
Life Insurance	1,896	1,937	-40.79	-2.11%	15	50,419	0.8%	92.9	2.2%	NM	NM	ROBI	124,139	3.4%	59.6	26.6x	1.9x
Telecommunication	4,147	4,177	-30.07	-0.72%	3	480,109	7.4%	87.7	2.1%	11.4x	3.2x	BEXIMCO	103,842	2.9%	0.2	NM	1.2x
Pharmaceutical	3,157	3,187	-29.81	-0.94%	34	599,094	9.2%	1,672.1	40.3%	16.2x	1.7x	BERGERPBL	83,935	2.3%	5.3	25.9x	5.8x
Fuel & Power	1,182	1,199	-17.48	-1.46%	23	311,100	4.8%	140.3	3.4%	20.4x	0.7x	RENATA	81,285	2.3%	6.3	35.4x	2.5x
Cement	2,189	2,224	-35.35	-1.59%	7	104,544	1.6%	97.3	2.3%	17.6x	2.3x	UPGDCL	73,505	2.0%	1.8	9.8x	2.2x
Services & Real Estate	1,353	1,390	-37.62	-2.71%	9	74,784	1.2%	69.9	1.7%	23.4x	0.5x	MARICO	69,606	1.9%	2.0	15.1x	8.5x
Engineering	2,894	2,963	-68.99	-2.33%	42	334,386	5.2%	198.9	4.8%	14.1x	1.0x	LHBL	64,224	1.8%	17.2	13.5x	3.3x
Food & Allied	15,846	16,036	-189.29	-1.18%	21	290,935	4.5%	377.0	9.1%	15.5x	4.9x	ISLAMIBANK	52,486	1.5%	0.0	8.3x	0.7x
IT	2,479	2,534	-54.71	-2.16%	11	32,616	0.5%	338.2	8.1%	26.9x	2.1x	UNILEVERCL	49,219	1.4%	57.6	57.0x	19.1x
Textile	1,161	1,184	-23.41	-1.98%	58	120,452	1.9%	352.6	8.5%	NM	0.8x	BXPHARMA	47,689	1.3%	28.8	8.9x	1.0x
Paper & Printing	6,385	6,553	-167.39	-2.55%	6	29,295	0.5%	46.4	1.1%	41.2x	1.3x	ICB	46,051	1.3%	1.4	NM	1.1x
Tannery	2,331	2,363	-32.03	-1.36%	6	25,526	0.4%	24.1	0.6%	36.7x	2.4x	DUTCHBANGL	41,392	1.2%	4.2	5.4x	0.8x
Jute	16,369	16,841	-472.21	-2.80%	3	3,836	0.1%	24.9	0.6%	NM	NM	EBL	35,312	1.0%	4.7	5.4x	0.8x
Ceramics	477	487	-10.07	-2.07%	5	21,162	0.3%	26.0	0.6%	41.3x	1.3x	POWERGRID	33,628	0.9%	2.2	NM	0.2x
Miscellaneous	4,227	4,256	-29.04	-0.68%	15	230,337	3.6%	42.8	1.0%	38.9x	1.8x	BEACONPHAR	29,961	0.8%	8.1	66.5x	4.9x
Corporate Bond**	7,072	6,972	+100.76	+1.45%	16	42,074	0.6%	0.1	0.0%	NM	NM	PUBALIBANK	29,036	0.8%	6.3	3.4x	0.6x
Treasury Bond**	272	265	+7.11	+2.68%	236	2,865,391	44.2%	0.2	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	
TECHNODRUG	56.2	+10.0%	837.4	NM	1.9x	SQURPHARMA	117,112	8.6%	9.3x	1.5x	TECHNODRUG	56.2	+10.0%	837.4	NM	1.9x	
RELIANCINS	61.6	+4.9%	2.6	8.1x	1.0x	BEXIMCO	69,460	5.1%	NM	1.2x	ORIONINFU	532.1	+3.9%	305.2	NM	35.7x	
ORIONINFU	532.1	+3.9%	305.2	NM	35.7x	BATBC	45,948	3.4%	10.2x	3.4x	AGNISYSL	34.0	-	248.2	31.8x	2.1x	
FIRSTFIN	3.6	+2.9%	0.4	NM	NM	RENATA	35,002	2.6%	35.4x	2.5x	AIL	110.1	+2.0%	139.4	44.6x	4.6x	
RECKITBEN	4,892.6	+2.7%	8.5	NM	17.2x	ISLAMIBANK	33,649	2.5%	8.3x	0.7x	NRBBANK	13.1	-3.0%	104.6	15.9x	1.0x	
SALVOCHEM	50.2	+2.4%	89.5	24.6x	3.0x	BXPHARMA	32,479	2.4%	8.9x	1.0x	SALVOCHEM	50.2	+2.4%	89.5	24.6x	3.0x	
AIL	110.1	+2.0%	139.4	44.6x	5x	BRACBANK	32,157	2.4%	6.8x	0.9x	SQURPHARMA	212.9	-0.6%	74.4	9.3x	1.5x	
PUBALIBANK	25.1	+1.6%	6.3	3.4x	0.6x	GP	30,004	2.2%	9.6x	4.7x	BEACHHATCH	83.8	+0.2%	73.3	43.4x	6.7x	
RELIANCE1	19.7	+1.5%	11.6	NM	1.8x	LHBL	24,690	1.8%	13.5x	3.3x	LOVELLO	90.6	-3.0%	66.7	65.7x	6.9x	
RUPALIBANK	28.8	+1.4%	9.5	20.7x	0.8x	EBL	24,199	1.8%	5.4x	0.8x	MIDLANDBNK	22.3	-2.6%	65.6	13.9x	1.5x	
						PUBALIBANK	20,448	1.5%	3.4x	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%	4.7x	0.7x							
						OLYMPIC	12,616	0.9%	14.3x	2.3x							
						UTTARABANK	11,350	0.8%	11.6x	0.8x							
						ORIONPHARM	11,317	0.8%	14.7x	0.7x							
						ROBI	10,738	0.8%	26.6x	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)						
PADMALIFE	21.0	-10.3%	1.3	NM	NM	RELIANCE1	21.1	18.9	6.0	1,996	39.03						
LIBRAINFU	892.5	-3.0%	36.3	NM	1x	ORIONINFU	517.0	496.8	5.0	49	24.68						
NTC	304.1	-3.0%	0.2	NM	NM	1STPRIMFMF	51.5	48.5	15.0	442	22.04						
LOVELLO	90.6	-3.0%	66.7	65.7x	6.9x	CENTRALINS	58.8	52.7	2.0	250	14.09						
AL-HAJTEX	126.4	-3.0%	4.4	NM	13.9x	AIL	106.2	104.9	6.0	101	10.67						
CENTRALINS	51.9	-3.0%	0.5	25.8x	1.0x	BEACHHATCH	83.5	83.1	2.0	109	9.06						
MALEKSPIN	29.2	-3.0%	24.1	5.0x	0.6x	NBL	6.3	6.3	1.0	1,300	8.19						
BGIC	35.7	-3.0%	0.2	30.3x	1.8x	EBL	28.8	28.8	3.0	200	5.76						
CRYSTALINS	84.4	-3.0%	0.9	29.3x	3.5x	FINEFOODS	165.9	165.9	1.0	30	4.98						
GEMINISEA	312.0	-3.0%	52.6	44.2x	14.2x	NRBBANK	14.7	13.8	3.0	267	3.77						

* 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
RELIANCE1	21.1	18.9	39.0	1,996	6
ORIONINFU	517.0	496.8	24.7	49	5
1STPRIMFMF	51.5	48.5	22.0	442	15
CENTRALINS	58.8	52.7	14.1	250	2
AIL	106.2	104.9	10.7	101	6
BEACHHATCH	83.5	83.1	9.1	109	2
NBL	6.3	6.3	8.2	1,300	1
EBL	28.8	28.8	5.8	200	3
FINEFOODS	165.9	165.9	5.0	30	1
NRBBANK	14.7	13.8	3.8	267	3
BRACBANK	38.0	38.0	3.7	97	1
MIDLANDBNK	24.4	24.3	3.1	126	3
GIB	7.4	7.2	2.6	360	2
BEXGSUKUK	77.0	77.0	2.5	32	1
RUPALILIFE	167.0	155.8	2.5	15	2
LOVELLO	95.0	91.0	1.8	20	2
PRAGATILIF	137.7	137.7	1.7	12	1
PRAGATILIF	137.7	137.7	1.7	12	1
CONFIDCEM	70.6	70.6	1.6	22	1
AL-HAJTEX	141.0	141.0	1.5	11	1
CLICL	44.0	44.0	1.4	33	1
EPGL	19.0	19.0	1.4	74	1
Total			177.1		78

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
BIFC		0.0%	0%	Record Date	12-Aug-24
GP		0.0%	160%	Record Date	13-Aug-24
BERGERPBL		0.0%	500%	Record Date	18-Aug-24
PADMALIFE		0.0%	0%	Record Date	22-Aug-24

Important DSE News

RUPALIINS

(Q2 Un-audited): EPS was Tk. 0.39 for April-June 2024 as against Tk. 0.41 for April-June 2023; EPS was Tk. 0.75 for January-June 2024 as against Tk. 0.76 for January-June 2023. NOCFPS was Tk. 0.38 for January-June 2024 as against Tk. 0.44 for January-June 2023. NAV per share was Tk. 21.11 as on June 30, 2024 and Tk. 20.45 as on December 31, 2023.

PUBALIBANK

(Q2 Un-audited): Consolidated EPS was Tk. 2.19 for April-June 2024 as against Tk. 1.22 (restated) for April-June 2023; Consolidated EPS was Tk. 3.73 for January-June 2024 as against Tk. 2.41 (restated) for January-June 2023. Consolidated NOCFPS was Tk. 17.15 for January-June 2024 as against Tk. (2.28) for January-June 2023. Consolidated NAV per share was Tk. 44.29 as on June 30, 2024 and Tk. 42.74 as on June 30, 2023.

BDFINANCE

(Q2 Un-audited): Consolidated EPS was Tk. 0.13 for April-June 2024 as against Tk. 0.14 for April-June 2023; Consolidated EPS was Tk. 0.33 for January-June 2024 as against Tk. 0.24 for January-June 2023. Consolidated NOCFPS was Tk. 0.54 for January-June 2024 as against Tk. 0.82 for January-June 2023. Consolidated NAV per share was Tk. 11.85 as on June 30, 2024 and Tk. 11.53 as on December 31, 2023.

LINDEBD

(Q2 Un-audited): Consolidated EPS was Tk. 10.05 for April-June 2024 as against Tk. 9.19 for April-June 2023; Consolidated EPS was Tk. 21.56 for January-June 2024 as against Tk. 18.41 for January-June 2023. Consolidated NOCFPS was Tk. 19.57 for January-June 2024 as against Tk. 67.80 for January-June 2023. Consolidated NAV per share was Tk. 408.40 as on June 30, 2024 and Tk. 386.84 as on December 31, 2023.

ROBI

(Q2 Un-audited): Consolidated EPS was Tk. 0.21 for April - June 2024 as against Tk. 0.05 for April - June 2023; Consolidated EPS was Tk. 0.41 for January - June 2024 as against Tk. 0.13 for January - June 2023; Consolidated NOCFPS was Tk. 4.45 for January - June 2024 as against Tk. 3.41 for January - June 2023. Consolidated NAV per share was Tk. 12.17 as on June 30, 2024 and Tk. 12.76 as on December 31, 2023.

PRAGATIINS

(Q2 Un-audited): EPS was Tk. 1.33 for April-June 2024 as against Tk. 1.36 (restated) for April-June 2023; EPS was Tk. 2.46 for January-June 2024 as against Tk. 2.48 (restated) for January-June 2023. NOCFPS was Tk. 1.46 for January-June 2024 as against Tk. 1.73 (restated) for January-June 2023. NAV per share was Tk. 54.36 as on June 30, 2024 and Tk. 55.11 as on December 31, 2023.

NORTHRNINS

(Q2 Un-audited): EPS was Tk. 0.35 for April-June 2024 as against Tk. 0.33 for April-June 2023; EPS was Tk. 1.05 for January-June 2024 as against Tk. 1.02 for January-June 2023. NOCFPS was Tk. 3.20 for January-June 2024 as against Tk. 3.26 for January-June 2023. NAV per share was Tk. 25.04 as on June 30, 2024 and Tk. 24.18 as on June 30, 2023.

FEDERALINS

(Q2 Un-audited): EPS was Tk. 0.21 for April-June 2024 as against Tk. 0.30 for April-June 2023; EPS was Tk. 0.54 for January-June 2024 as against Tk. 0.65 for January-June 2023. NOCFPS was Tk. 0.16 for January-June 2024 as against Tk. 0.24 for January-June 2023. NAV per share was Tk. 13.47 as on June 30, 2024 and Tk. 12.93 as on December 31, 2023.

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ICBIBANK

(Q2 Un-audited): EPS was Tk. (0.22) for April-June 2024 as against Tk. (0.23) for April-June 2023; EPS was Tk. (0.42) for January-June 2024 as against Tk. (0.39) for January-June 2023. NOCFPS was Tk. (0.26) for January-June 2024 as against Tk. 0.27 for January-June 2023. NAV per share was Tk. (19.78) as on June 30, 2024 and Tk. (18.91) as on June 30, 2023.

RELIANCINS

(Q2 Un-audited): EPS was Tk. 2.67 for April-June 2024 as against Tk. 2.01 for April-June 2023; EPS was Tk. 4.63 for January-June 2024 as against Tk. 3.60 for January-June 2023. NOCFPS was Tk. 10.31 for January-June 2024 as against Tk. 6.38 for January-June 2023. NAV per share was Tk. 64.55 as on June 30, 2024 and Tk. 66.85 as on December 31, 2023.

PARAMOUNT

(Q2 Un-audited): EPS was Tk. 0.69 for April-June 2024 as against Tk. 0.38 for April-June 2023; EPS was Tk. 1.82 for January-June 2024 as against Tk. 1.12 for January-June 2023. NOCFPS was Tk. 1.07 for January-June 2024 as against Tk. 0.78 for January-June 2023. NAV per share was Tk. 28.47 as on June 30, 2024 and Tk. 26.91 as on June 30, 2023.

HEIDELBCEM

(Q2 Un-audited): EPS was Tk. 0.50 for April-June 2024 as against Tk. 1.61 for April-June 2023; EPS was Tk. 7.45 for January-June 2024 as against Tk. 8.46 for January-June 2023. NOCFPS was Tk. 15.08 for January-June 2024 as against Tk. 40.68 for January-June 2023. NAV per share was Tk. 72.15 as on June 30, 2024 and Tk. 67.20 as on December 31, 2023.

GIB

(Q2 Un-audited): EPS was Tk. 0.16 for April-June 2024 as against Tk. 0.12 (restated) for April-June 2023; EPS was Tk. 0.97 for January-June 2024 as against Tk. 0.70 (restated) for January-June 2023. NOCFPS was Tk. 1.30 for January-June 2024 as against Tk. (10.51) (restated) for January-June 2023. NAV per share was Tk. 14.40 as on June 30, 2024 and Tk. 14.51 (restated) as on June 30, 2023.

BRACBANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.41 for April-June 2024 as against Tk. 0.94 for April-June 2023; Consolidated EPS was Tk. 2.95 for January-June 2024 as against Tk. 1.75 for January-June 2023. Consolidated NOCFPS was Tk. 35.83 for January-June 2024 as against Tk. 19.61 for January-June 2023. Consolidated NAV per share was Tk. 39.95 as on June 30, 2024 and Tk. 37.60 as on December 31, 2023.

DUTCHBANGL

(Q2 Un-audited): EPS was Tk. 0.86 for April-June 2024 as against Tk. 1.31 (restated) for April-June 2023; EPS was Tk. 2.32 for January-June 2024 as against Tk. 2.73 (restated) for January-June 2023. NOCFPS was Tk. 42.60 for January-June 2024 as against Tk. 20.04 (restated) for January-June 2023. NAV per share was Tk. 55.56 as on June 30, 2024 and Tk. 54.82 (restated) as on December 31, 2023. NOCFPS increased mainly for increase of deposits from customers and increase of interest income of the bank.

KARNAPHULI

(Q2 Un-audited): EPS was Tk. 0.48 for April-June 2024 as against Tk. 0.44 for April-June 2023; EPS was Tk. 1.12 for January-June 2024 as against Tk. 1.07 for January-June 2023. NOCFPS was Tk. 1.20 for January-June 2024 as against Tk. 1.14 for January-June 2023. NAV per share was Tk. 22.72 as on June 30, 2024 and Tk. 21.78 as on December 31, 2023.

EXIMBANK

(Q2 Un-audited): Consolidated EPS was Tk. 0.90 for April-June 2024 as against Tk. 1.07 for April-June 2023; Consolidated EPS was Tk. 1.14 for January-June 2024 as against Tk. 1.21 for January-June 2023. Consolidated NOCFPS was Tk. (0.005) for January-June 2024 as against Tk. 4.61 for January-June 2023. Consolidated NAV per share was Tk. 24.14 as on June 30, 2024 and Tk. 23.07 as on June 30, 2023.

SIBL

(Q2 Un-audited): Consolidated EPS was Tk. 0.34 for April-June 2024 as against Tk. 0.32 (restated) for April-June 2023; Consolidated EPS was Tk. 0.53 for January-June 2024 as against Tk. 0.46 (restated) for January-June 2023. Consolidated NOCFPS was Tk. 7.12 for January-June 2024 as against Tk. (2.17) (restated) for January-June 2023. Consolidated NAV per share was Tk. 21.22 as on June 30, 2024 and Tk. 19.69 (restated) as on June 30, 2023.

JAMUNABANK

(Q2 Un-audited): Consolidated EPS was Tk. 1.76 for April-June 2024 as against Tk. 1.51 for April-June 2023; Consolidated EPS was Tk. 3.79 for January-June 2024 as against Tk. 3.16 for January-June 2023. Consolidated NOCFPS was Tk. 50.14 for January-June 2024 as against Tk. 26.61 for January-June 2023. Consolidated NAV per share was Tk. 27.07 as on June 30, 2024 and Tk. 24.67 as on December 31, 2023.

IFIC

(Q2 Un-audited): Consolidated EPS was Tk. 0.12 for April-June 2024 as against Tk. 0.24 (restated) for April-June 2023; Consolidated EPS was Tk. 0.33 for January-June 2024 as against Tk. 0.56 (restated) for January-June 2023; Consolidated NOCFPS was Tk. 4.66 for January-June 2024 as against Tk. (0.36) (restated) for January-June 2023. Consolidated NAV per share was Tk. 19.15 as on June 30, 2024 and Tk. 18.02 (restated) as on June 30, 2023.

EASTRNLAB

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Eastern Lubricants Blenders PLC.' instead of 'Eastern Lubricants Blenders Limited' with effect from July 31, 2024. Other things (except name) will remain unchanged

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