

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.06%) gained 3.01 points and closed at 5,247.14. The blue-chip index DS30 (+0.11%), the Shariah-based index DSES (+0.05%), and the large-cap index CDSET (+0.38%) closed at 1,877.50, 1,146.65, and 1,019.37 points, respectively. Most of the large-cap sectors posted positive performance today. Engineering booked the highest gain of 4.19% followed by Food & Allied (+1.40%), Telecommunication (+0.59%), Fuel & Power (+0.48%), Pharmaceutical (+0.48%), Bank (-0.20%), and NBF1 (-0.25%), respectively. Block trades contributed 9.2% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+3.9%) was the most traded share with a turnover of BDT 208 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,247.14	5,244.13	+3.01	+0.06%	-16.0%
DS30	1,877.50	1,875.48	+2.03	+0.11%	-10.3%
DSES	1,146.65	1,146.06	+0.59	+0.05%	-15.9%
CDSET	1,019.37	1,015.54	+3.83	+0.38%	-15.3%

	Advanced	Declined	Unchanged	Total
All Category	111	232	55	398
A Category (Equity)	76	126	35	237
B Category (Equity)	21	71	11	103
N Category (Equity)	0	4	0	4
Z Category (Equity)	14	31	9	54
Mutual Funds	3	22	12	37
Corporate Bonds	0	0	0	0
Treasury Bonds	1	4	0	5

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,463,500	6,436,499	+0.4%
	Mn USD	54,776	54,547	
Turnover	Mn BDT	4,867	4,529	+7.5%
	Mn USD	41	38	
Volume	Mn Shares	130	112	+15.6%
	No. of Trade	133,894	119,654	+11.9%

* Average Interbank Exchange Rate is BDT 118.00 as of Jun 23, 2024

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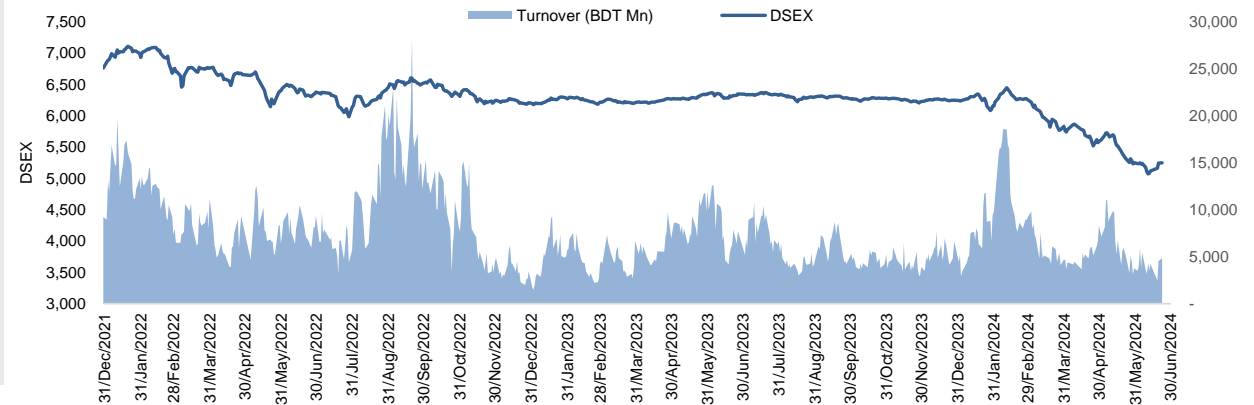


Figure: Sectorial Turnover (BDT Mn)

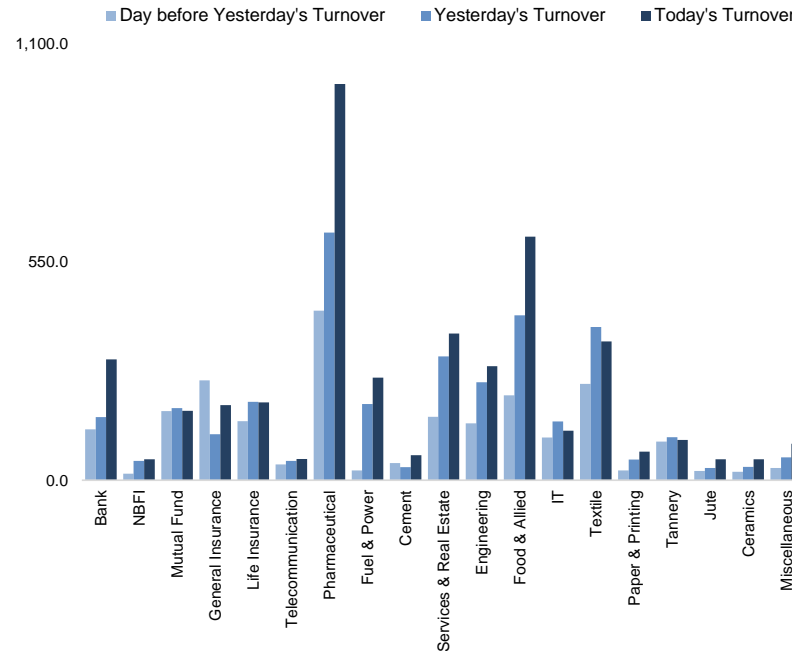
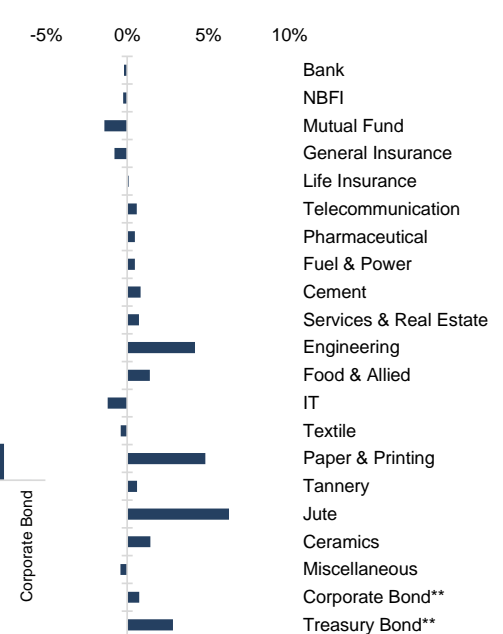


Figure: Sectorial Mcap Change



Market PE 13.7x
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	1,284	1,287	-2.55	-0.20%	36	614,285	9.5%	305.0	6.9%	7.1x	0.6x	GP	306,383	8.7%	30.5	7.9x	3.8x
NBFI	1,073	1,076	-2.69	-0.25%	23	103,896	1.6%	53.0	1.2%	NM	NM	SQURPHARMA	182,875	5.2%	93.8	9.0x	1.5x
Mutual Fund	651	661	-9.24	-1.40%	37	30,434	0.5%	174.8	4.0%	NM	0.6x	BATBC	177,120	5.0%	110.4	10.1x	3.4x
General Insurance	2,926	2,949	-22.94	-0.78%	43	84,766	1.3%	189.4	4.3%	15.3x	1.3x	WALTONHIL	171,821	4.9%	6.2	13.3x	1.6x
Life Insurance	1,977	1,975	+1.66	+0.08%	15	52,561	0.8%	196.4	4.4%	NM	NM	ROBI	111,044	3.1%	15.6	29.0x	1.6x
Telecommunication	3,763	3,741	+22.22	+0.59%	3	435,732	6.7%	53.6	1.2%	9.8x	2.7x	BEXIMCO	103,842	2.9%	0.0	NM	1.2x
Pharmaceutical	3,078	3,063	+14.60	+0.48%	33	587,543	9.1%	998.7	22.6%	15.9x	1.7x	RENATA	82,983	2.3%	31.3	36.2x	2.6x
Fuel & Power	1,200	1,195	+5.71	+0.48%	23	316,005	4.9%	258.5	5.9%	20.7x	0.7x	BERGERPBL	80,985	2.3%	1.3	24.9x	6.0x
Cement	2,168	2,150	+17.66	+0.82%	7	103,539	1.6%	62.9	1.4%	15.0x	2.1x	UPGDCL	70,723	2.0%	2.9	9.4x	2.1x
Services & Real Estate	1,524	1,513	+11.02	+0.73%	9	84,262	1.3%	370.1	8.4%	26.4x	0.6x	LHBL	70,147	2.0%	48.0	12.4x	2.9x
Engineering	2,875	2,759	+115.49	+4.19%	42	332,125	5.1%	287.5	6.5%	13.9x	1.0x	BRACBANK	59,993	1.7%	22.2	6.7x	0.9x
Food & Allied	15,982	15,761	+220.78	+1.40%	21	293,420	4.5%	614.0	13.9%	15.6x	4.9x	ISLAMIBANK	52,486	1.5%	0.0	8.3x	0.7x
IT	2,416	2,445	-29.47	-1.21%	11	31,783	0.5%	124.9	2.8%	26.2x	2.1x	UNILEVERCL	51,027	1.4%	68.3	59.1x	19.8x
Textile	1,206	1,211	-4.89	-0.40%	58	125,100	1.9%	349.7	7.9%	NM	0.8x	ICB	46,485	1.3%	3.9	NM	1.1x
Paper & Printing	6,791	6,479	+312.77	+4.83%	6	31,158	0.5%	71.7	1.6%	48.1x	1.5x	BXPHARMA	46,083	1.3%	7.5	8.6x	1.0x
Tannery	2,406	2,391	+14.64	+0.61%	6	26,348	0.4%	101.4	2.3%	37.9x	2.5x	DUTCHBANGL	42,008	1.2%	3.2	5.2x	0.9x
Jute	16,190	15,234	+956.27	+6.28%	3	3,794	0.1%	53.0	1.2%	NM	NM	BEACONPHAR	37,330	1.1%	29.3	82.9x	6.1x
Ceramics	490	483	+6.94	+1.43%	5	21,773	0.3%	53.1	1.2%	42.5x	1.3x	POWERGRID	35,638	1.0%	1.0	NM	0.2x
Miscellaneous	4,187	4,204	-17.74	-0.42%	15	228,121	3.5%	91.8	2.1%	38.5x	1.8x	EBL	35,176	1.0%	10.9	5.4x	0.8x
Corporate Bond**	6,078	6,032	+45.05	+0.75%	16	42,685	0.7%	0.0	0.0%	NM	NM	BESTHLDNG	31,353	0.9%	37.4	22.8x	0.5x
Treasury Bond**	154	150	+4.23	+2.83%	240	2,913,758	45.1%	8.4	0.2%	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
SALVOCHEM	46.2	+10.0%	84.4	22.6x	2.8x	SQURPHARMA	121,789	7.0%	9.0x	1.5x	SEAPEARL	98.2	+3.9%	208.3	33.0x	5.1x
PAPERPROC	133.7	+10.0%	6.9	69.5x	9.2x	BATBC	74,086	4.3%	10.1x	3.4x	LINDEBD	1,432.5	+1.6%	197.8	34.8x	3.7x
MONOSPOOL	168.1	+9.9%	9.2	62.9x	9.8x	BEXIMCO	69,196	4.0%	NM	1.2x	ORIONPHARM	71.2	-0.1%	197.6	16.2x	0.8x
ZAHINTEX	5.8	+9.4%	0.8	NM	0.8x	RENATA	68,042	3.9%	36.2x	2.6x	BEACHHATCH	75.2	+0.9%	144.1	39.0x	6.0x
SONALIANSH	279.8	+8.7%	52.5	32.6x	4.2x	BXPHARMA	45,564	2.6%	8.6x	1.0x	ORIONINFU	499.4	+3.0%	129.4	NM	33.5x
BSRMSTEEL	59.1	+8.6%	19.1	4.9x	0.8x	GP	38,700	2.2%	7.9x	3.8x	ASIATICLAB	54.7	-2.8%	122.8	NM	1.1x
WALTONHIL	567.2	+7.5%	6.2	13.3x	2x	BEACONPHAR	34,036	2.0%	82.9x	6.1x	RUPALILIFE	186.5	-1.6%	111.0	NM	NM
RENATA	723.5	+7.4%	31.3	36.2x	2.6x	ISLAMIBANK	33,649	1.9%	8.3x	0.7x	BATBC	328.0	+0.7%	110.4	10.1x	3.4x
SONALIPAPR	297.4	+6.4%	29.3	90.4x	1.7x	BRACBANK	30,964	1.8%	6.7x	0.9x	SQURPHARMA	206.3	-0.1%	93.8	9.0x	1.5x
WATACHEM	124.1	+5.4%	2.0	47.5x	2.0x	LHBL	28,853	1.7%	12.4x	2.9x	UNIQUEHRL	57.9	+1.9%	89.3	12.0x	0.6x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NORTHERN	120.0	-3.0%	0.3	NM	1.5x	PUBALIBANK	18,457	1.1%	4.0x	0.6x	SEAPEARL	103.0	92.0	3.0	934	90.96
LEGACYFOOT	64.9	-3.0%	17.6	NM	6x	CITYBANK	18,190	1.0%	3.9x	0.6x	EIL	38.0	38.0	1.0	1,000	38.00
STYLECRAFT	58.6	-3.0%	2.0	NM	6.4x	OLYMPIC	16,818	1.0%	14.8x	2.4x	ICBSONALI1	10.0	10.0	1.0	3,800	38.00
CRYSTALINS	101.2	-3.0%	5.4	35.9x	4.1x	ROBI	15,714	0.9%	29.0x	1.6x	FINEFOODS	182.2	181.9	3.0	198	36.12
JMISMDL	143.9	-3.0%	5.9	NM	1.7x	BSRMLTD	14,210	0.8%	4.6x	0.6x	SQURPHARMA	224.5	206.5	2.0	148	30.89
PARAMOUNT	55.7	-3.0%	6.8	26.3x	2.0x	BESTHLDNG	14,098	0.8%	22.8x	0.5x	LOVELLO	90.2	84.5	4.0	257	22.80
APEXTANRY	85.2	-3.0%	1.0	NM	1.7x	PRIMEBANK	13,962	0.8%	4.6x	0.6x	DGIC	29.2	25.9	5.0	742	20.50
KBPPWBIL	114.9	-3.0%	1.1	NM	9.7x	UPGDCL	13,547	0.8%	9.4x	2.1x	CAPITECGBF	14.8	14.1	4.0	950	13.43
MIRACLEIND	29.6	-3.0%	5.9	NM	1.9x	SUMITPOWER	13,369	0.8%	30.1x	0.5x	APEXFOOT	253.0	225.9	2.0	47	11.40
BEACONPHAR	161.6	-2.9%	29.3	82.9x	6.1x						ASIATICLAB	61.9	54.7	3.0	172	10.40

* 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
SEAPEARL	103.0	92.0	91.0	934	3
EIL	38.0	38.0	38.0	1,000	1
ICBSONALI1	10.0	10.0	38.0	3,800	1
FINEFOODS	182.2	181.9	36.1	198	3
SQURPHARMA	224.5	206.5	30.9	148	2
LOVELLO	90.2	84.5	22.8	257	4
DGIC	29.2	25.9	20.5	742	5
CAPITECGBF	14.8	14.1	13.4	950	4
APEXFOOT	253.0	225.9	11.4	47	2
ASIATICLAB	61.9	54.7	10.4	172	3
CENTRALINS	54.4	51.0	9.2	170	2
AIL	120.0	115.0	8.2	69	5
MEGHNACEM	78.3	78.0	7.5	96	6
BEACHHATCH	74.6	74.6	7.2	96	3
BSRMLTD	81.1	81.0	6.5	81	10
PREMIERCEM	56.7	56.7	5.7	100	4
1STPRIMFMF	35.3	35.3	5.2	149	1
RELIANCE1	20.6	19.5	4.6	226	2
IPDC	19.9	17.6	4.3	230	2
AL-HAJTEX	157.5	157.5	3.9	25	1
PRAGATILIF	146.4	146.4	3.7	25	1
RDFOOD	34.4	34.4	3.5	103	1
Total			449.4		114

Important DSE News

BAYLEASING

The company has informed that Mr. Mohammad Ruknuzzaman has been appointed as the Managing Director of the company with effect from May 21, 2024.

MLDYEING

Emerging Credit Rating Limited (ECRL) has affirmed initial rating of the Company as "A-" in the long term and "ST-2" in the short term along with a Stable outlook based on audited financial statements for FY2020 to FY2023, a 9-month unaudited financial statement ending on March 31, 2024, and other available information up to the date of rating declaration.

WALTONHIL

Mr. S. M. Mahbul Alam, a Sponsor Director of the Company, has further informed that he has completed his sale of 1,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated on 14.12.2022.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PURABIGEN		0.0%	10%	Record Date	25-Jun-24
UNIONINS		0.0%	10%	Record Date	25-Jun-24
HAMI		0.0%	1%	Record Date	26-Jun-24
TAKAFULINS		0.0%	10%	Record Date	27-Jun-24
DELTALIFE		0.0%	30%	Record Date	8-Jul-24
BDFINANCE		0.0%	0%	Record Date	8-Jul-24
LINDEBD		0.0%	1540%	Record Date	9-Jul-24

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