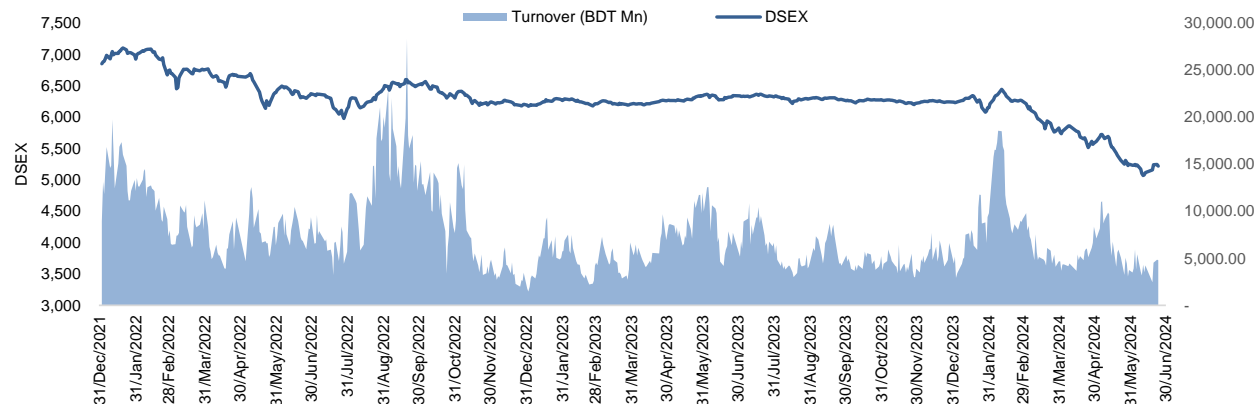


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.51%) lost 26.95 points and closed at 5,220.19. The blue-chip index DS30 (-0.51%), the Shariah-based index DSES (-0.33%), and the large-cap index CDSET (-0.37%) closed at 1,867.99, 1,142.85, and 1,015.56 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 3.63%, followed by Engineering (+0.71%), Telecommunication (+0.29%), Bank (-0.30%), Fuel & Power (-0.44%), Pharmaceutical (-0.47%), and Food & Allied (-0.70%), respectively. Block trades contributed 28.9% of the overall market turnover. Linde Bangladesh Limited (-1.6%) was the most traded share with a turnover of BDT 232 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,220.19	5,247.14	-26.95	-0.51%	-16.4%
DS30	1,867.99	1,877.50	-9.51	-0.51%	-10.8%
DSES	1,142.85	1,146.65	-3.80	-0.33%	-16.2%
CDSET	1,015.56	1,019.37	-3.81	-0.37%	-15.6%

	Advanced	Declined	Unchanged	Total
All Category	92	255	48	395
A Category (Equity)	53	149	32	234
B Category (Equity)	26	71	6	103
N Category (Equity)	0	2	2	4
Z Category (Equity)	13	33	8	54
Mutual Funds	7	17	13	37
Corporate Bonds	1	1	0	2
Treasury Bonds	2	0	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,459,837	6,463,500	-0.1%
	Mn USD	54,744	54,775	
Turnover	Mn BDT	4,799	4,867	-1.4%
	Mn USD	41	41	
Volume	Mn Shares	150	130	+15.6%
No. of Trade		110,081	133,894	-17.8%

* Average Interbank Exchange Rate is BDT 118.00 as of Jun 24, 2024

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Figure: Sectorial Turnover (BDT Mn)

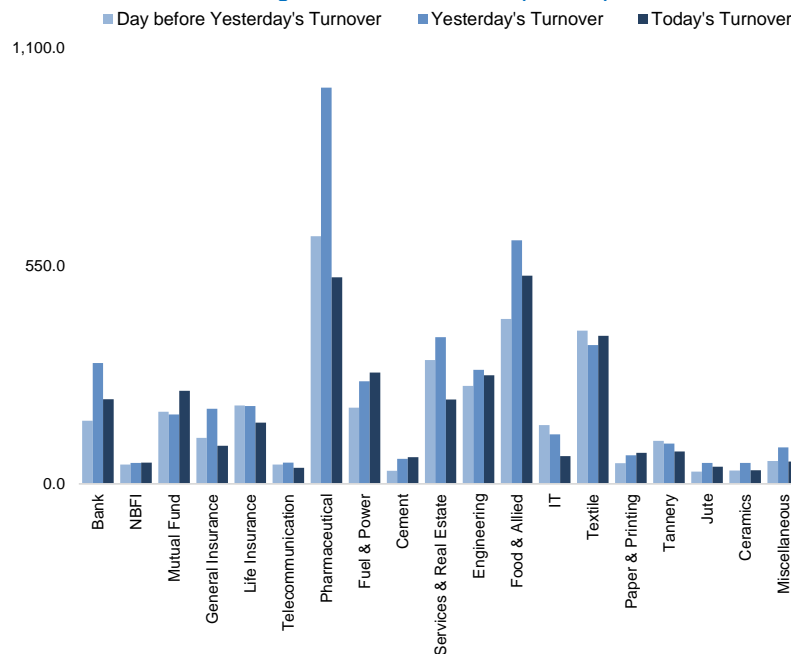
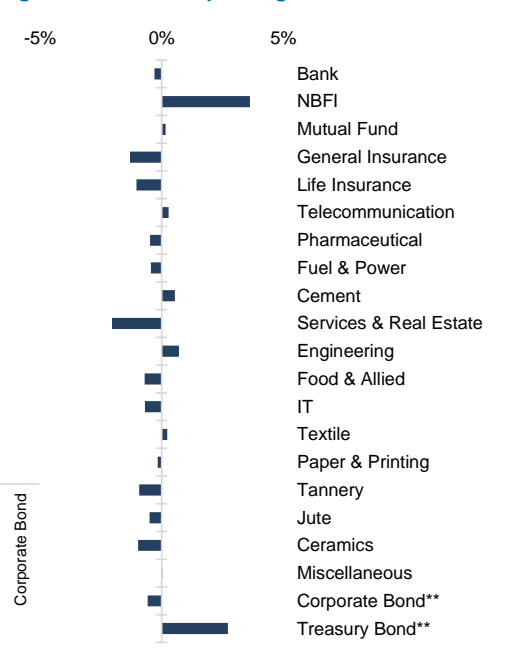


Figure: Sectorial Mcap Change



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	1,281	1,284	-3.88	-0.30%	36	612,429	9.5%	213.7	6.3%	7.1x	0.6x	GP	308,138	8.7%	26.5	8.0x	3.8x
NBFI	1,112	1,073	+38.91	+3.63%	23	107,663	1.7%	53.5	1.6%	NM	NM	SQRPHARMA	182,343	5.2%	67.6	9.0x	1.5x
Mutual Fund	653	651	+1.05	+0.16%	37	30,483	0.5%	234.9	6.9%	NM	0.6x	WALTONHIL	176,092	5.0%	62.3	13.6x	1.6x
General Insurance	2,888	2,926	-38.13	-1.30%	43	83,661	1.3%	96.1	2.8%	15.1x	1.3x	BATBC	173,070	4.9%	114.0	9.9x	3.3x
Life Insurance	1,957	1,977	-20.56	-1.04%	15	52,015	0.8%	154.3	4.5%	NM	NM	ROBI	111,044	3.1%	9.5	29.0x	1.6x
Telecommunication	3,774	3,763	+10.75	+0.29%	3	436,976	6.8%	40.7	1.2%	9.8x	2.7x	BEXIMCO	103,842	2.9%	0.0	NM	1.2x
Pharmaceutical	3,063	3,078	-14.58	-0.47%	33	584,760	9.1%	520.8	15.3%	15.8x	1.7x	RENATA	82,811	2.3%	21.1	36.1x	2.5x
Fuel & Power	1,195	1,200	-5.34	-0.44%	23	314,599	4.9%	280.9	8.2%	20.6x	0.7x	BERGERPBL	81,787	2.3%	25.6	25.1x	6.1x
Cement	2,180	2,168	+11.80	+0.54%	7	104,103	1.6%	67.1	2.0%	15.1x	2.1x	UPGDCL	71,303	2.0%	2.5	9.5x	2.1x
Services & Real Estate	1,493	1,524	-31.20	-2.05%	9	82,537	1.3%	212.8	6.2%	25.9x	0.6x	LHBL	70,728	2.0%	52.1	12.5x	3.0x
Engineering	2,895	2,875	+20.45	+0.71%	42	334,488	5.2%	273.8	8.0%	14.0x	1.0x	BRACBANK	60,347	1.7%	18.4	6.8x	0.9x
Food & Allied	15,870	15,982	-111.31	-0.70%	21	291,377	4.5%	524.9	15.4%	15.5x	4.9x	UNILEVERCL	53,430	1.5%	101.9	61.9x	20.7x
IT	2,399	2,416	-16.60	-0.69%	11	31,565	0.5%	69.9	2.1%	26.0x	2.0x	ISLAMIBANK	52,486	1.5%	0.0	8.3x	0.7x
Textile	1,209	1,206	+2.80	+0.23%	58	125,390	1.9%	373.0	10.9%	NM	0.8x	ICB	50,561	1.4%	10.7	NM	1.2x
Paper & Printing	6,780	6,791	-11.14	-0.16%	6	31,107	0.5%	77.9	2.3%	48.0x	1.5x	BXPHARMA	46,173	1.3%	7.3	8.7x	1.0x
Tannery	2,383	2,406	-22.33	-0.93%	6	26,104	0.4%	81.7	2.4%	37.6x	2.5x	DUTCHBANGL	41,656	1.2%	2.6	5.2x	0.8x
Jute	16,108	16,190	-81.59	-0.50%	3	3,775	0.1%	43.0	1.3%	NM	NM	BEACONPHAR	36,221	1.0%	16.6	80.4x	5.9x
Ceramics	486	490	-4.73	-0.96%	5	21,563	0.3%	34.2	1.0%	42.1x	1.3x	POWERGRID	35,456	1.0%	0.8	NM	0.2x
Miscellaneous	4,188	4,187	+1.06	+0.03%	15	228,178	3.5%	56.3	1.7%	38.5x	1.8x	EBL	34,904	1.0%	3.4	5.3x	0.8x
Corporate Bond**	6,042	6,078	-35.11	-0.58%	16	42,124	0.7%	0.5	0.0%	NM	NM	BESTHLDNG	30,718	0.9%	25.1	22.3x	0.5x
Treasury Bond**	158	154	+4.19	+2.73%	240	2,914,535	45.1%	0.3	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
SAMATALETH	55.1	+10.0%	16.6	NM	3.8x	SQRPHARMA	121,789	7.0%	9.0x	1.5x	LINDEBD	1,409.4	-1.6%	231.7	34.3x	3.6x
PDL	10.3	+9.6%	21.4	NM	0.8x	BATBC	74,086	4.3%	9.9x	3.3x	SEAPEARL	96.4	-1.8%	136.4	32.3x	5.0x
ICB	58.3	+8.8%	10.7	NM	1.2x	BEXIMCO	69,196	4.0%	NM	1.2x	CAPITECGBF	15.4	+8.5%	117.4	NM	1.6x
CAPITECGBF	15.4	+8.5%	117.4	NM	1.6x	RENATA	68,042	3.9%	36.1x	2.5x	BATBC	320.5	-2.3%	114.0	9.9x	3.3x
ETL	11.2	+7.7%	24.6	27.4x	0.9x	BXPHARMA	45,564	2.6%	8.7x	1.0x	RUPALILIFE	187.1	+0.3%	106.0	NM	NM
DSSL	9.4	+6.8%	8.4	40.9x	0.5x	GP	38,700	2.2%	8.0x	3.8x	BEACHHATCH	76.2	+1.3%	105.5	39.5x	6.1x
SAFKOSPINN	13.6	+5.4%	1.5	NM	3x	BEACONPHAR	34,036	2.0%	80.4x	5.9x	ASIATICLAB	53.3	-2.6%	104.4	NM	1.1x
ACTIVEFINE	14.6	+5.0%	6.5	NM	0.7x	ISLAMIBANK	33,649	1.9%	8.3x	0.7x	UNILEVERCL	2,772.1	+4.7%	101.9	61.9x	20.7x
UNILEVERCL	2,772.1	+4.7%	101.9	61.9x	20.7x	BRACBANK	30,964	1.8%	6.8x	0.9x	LOVELLO	85.4	-0.7%	76.6	61.9x	6.5x
DULAMIACOT	60.2	+4.3%	0.0	NM	NM	LHBL	28,853	1.7%	12.5x	3.0x	SQRPHARMA	205.7	-0.3%	67.6	9.0x	1.5x

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)
APEXSPINN	103.6	-3.0%	1.4	27.6x	1.6x	NBL	19,116	1.1%	NM	1.3x	UNILEVERCL	2,647.4	2,647.4	1.0	283	749.69
AL-HAJTEX	152.3	-3.0%	10.9	NM	17x	PUBALIBANK	18,457	1.1%	4.0x	0.6x	NBL	6.3	6.3	2.0	35,744	225.18
SONALIPAPR	288.5	-3.0%	15.3	87.7x	1.7x	CITYBANK	18,190	1.0%	3.9x	0.6x	CAPITECGBF	15.6	13.8	14.0	5,601	78.94
NEWLINE	45.4	-3.0%	0.1	87.3x	1.8x	OLYMPIC	16,818	1.0%	14.8x	2.4x	FINEFOODS	181.5	179.0	3.0	412	73.78
GEMINISEA	236.8	-3.0%	30.2	33.5x	10.8x	ROBI	15,714	0.9%	29.0x	1.6x	RUPALILIFE	190.1	181.0	9.0	336	63.24
JMISMDL	139.6	-3.0%	2.4	NM	1.6x	BSRMLTD	14,210	0.8%	4.6x	0.6x	MPETROLEUM	218.4	198.0	2.0	231	46.12
MONNOAGML	396.4	-3.0%	10.2	NM	3.0x	BESTHLDNG	14,098	0.8%	22.3x	0.5x	GP	225.0	222.3	2.0	132	29.75
ECABLES	117.0	-3.0%	0.9	NM	0.3x	PRIMEBANK	13,962	0.8%	4.7x	0.7x	CRYSTALINS	98.2	98.2	3.0	247	24.26
SKTRIMS	26.0	-3.0%	0.7	19.7x	1.6x	UPGDCL	13,547	0.8%	9.5x	2.1x	MARICO	2,116.7	2,116.7	1.0	7	15.49
ORIONINFU	484.5	-3.0%	38.9	NM	32.5x	SUMITPOWER	13,369	0.8%	29.7x	0.5x	EIL	38.0	38.0	1.0	199	7.56

* 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
 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
UNILEVERCL	2,647.4	2,647.4	749.7	283	1
NBL	6.3	6.3	225.2	35,744	2
CAPITECGBF	15.6	13.8	78.9	5,601	14
FINEFOODS	181.5	179.0	73.8	412	3
RUPALILIFE	190.1	181.0	63.2	336	9
MPETROLEUM	218.4	198.0	46.1	231	2
GP	225.0	222.3	29.8	132	2
CRYSTALINS	98.2	98.2	24.3	247	3
MARICO	2,116.7	2,116.7	15.5	7	1
EIL	38.0	38.0	7.6	199	1
PARAMOUNT	59.2	54.1	5.4	96	3
MIDLANDBNK	16.6	16.6	5.4	325	1
MEGHNAINS	29.0	29.0	4.9	170	3
MONNOCERA	83.0	83.0	4.7	57	1
BEACHHATCH	82.7	73.0	4.7	63	4
ORIONINFU	525.0	484.5	3.9	8	4
PREMIERCEM	65.6	65.6	3.8	59	1
RELIANCE1	20.1	20.1	3.4	167	2
BEXGSUKUK	80.5	80.5	3.2	40	1
MEGHNALIFE	68.6	68.6	2.8	41	1
POPULARLIF	50.4	50.4	2.7	55	1
AIL	124.1	114.1	2.6	22	3
Total			1,388.6		94

Important DSE News
GREENDELTA

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Green Delta Insurance PLC.' instead of 'Green Delta Insurance Company Limited' with effect from June 25, 2024. Other things (except name) will remain unchanged.

EASTLAND

The company has informed that as per the decision of the Board of Directors of the company and subsequent approval of IDRA, Mr. Mohammed Salim has joined as Chief Executive Officer of the company.

PDL

Refer to their earlier news disseminated by DSE on 09.06.2024 regarding closure of production of the factory, the company has further informed that the production of the factory has resumed from Saturday, June 22, 2024. It took approximately two (2) months to start the production due to halt of gas supply.

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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