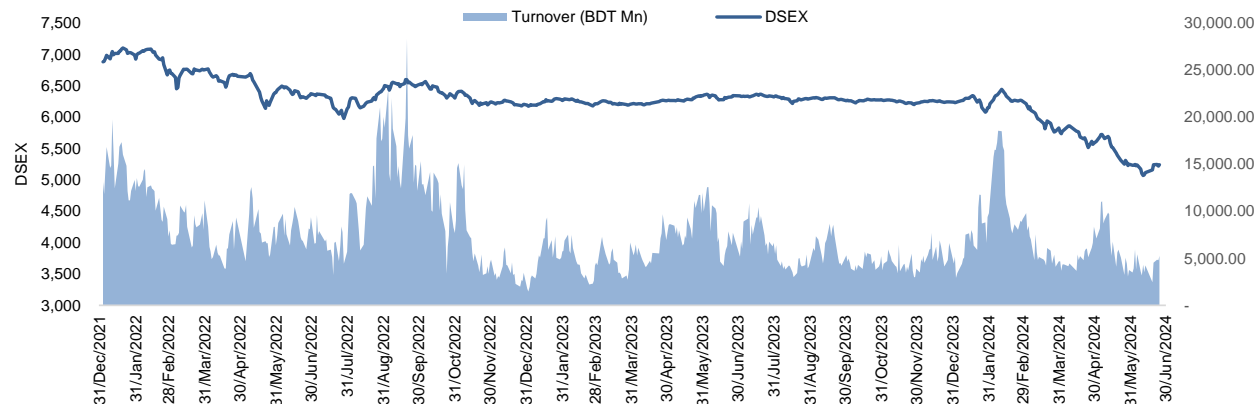


Daily Market Update

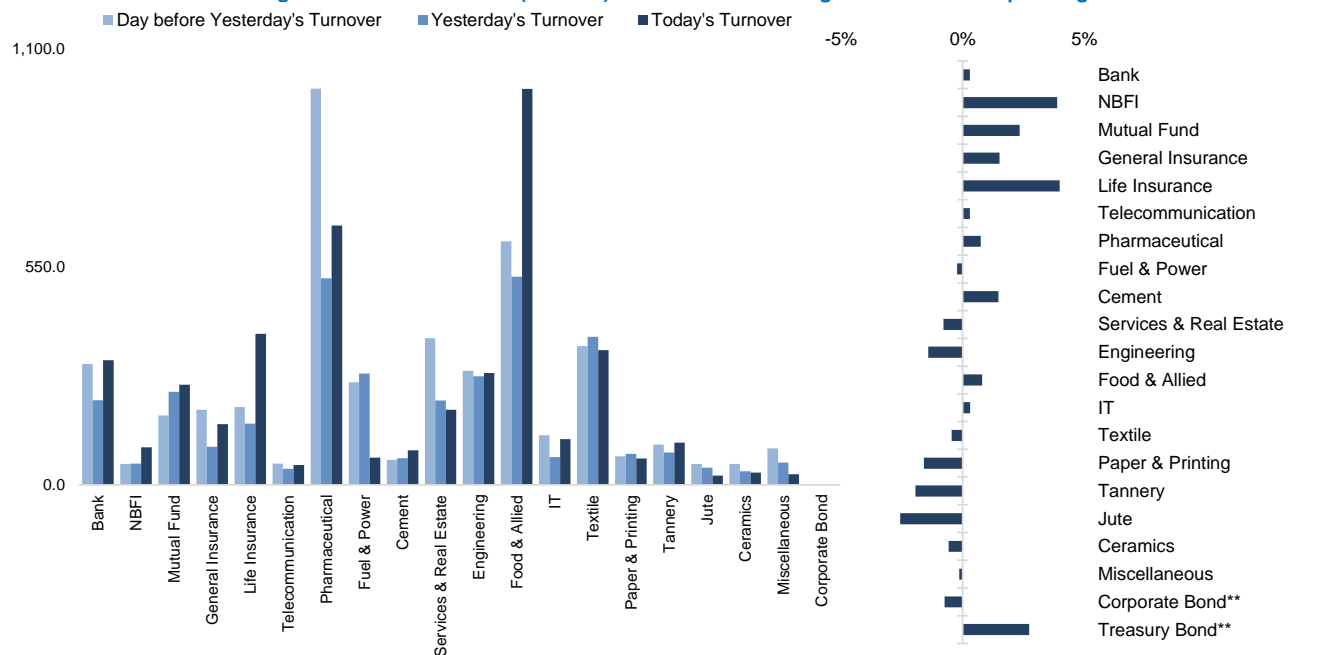
The market closed in green today. The benchmark index DSEX (+0.41%) gained 21.65 points and closed at 5,241.84. The blue-chip index DS30 (+0.53%), the Shariah-based index DSES (+0.59%), and the large-cap index CDSET (+0.47%) closed at 1,877.94, 1,149.56, and 1,020.38 points, respectively. Most of the large-cap sectors posted positive performance today. NBF1 booked the highest gain of 3.89% followed by Food & Allied (+0.80%), Pharmaceutical (+0.74%), Bank (+0.30%), Telecommunication (+0.29%), Fuel & Power (-0.23%), and Engineering (-1.41%), respectively. Block trades contributed 19.0% of the overall market turnover. Unilever Consumer Care Limited (+4.8%) was the most traded share with a turnover of BDT 537 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,241.84	5,220.19	+21.65	+0.41%	-16.1%
DS30	1,877.94	1,867.99	+9.95	+0.53%	-10.3%
DSES	1,149.56	1,142.85	+6.71	+0.59%	-15.7%
CDSET	1,020.38	1,015.56	+4.82	+0.47%	-15.2%

Figure: Sectorial Turnover (BDT Mn)

Figure: Sectorial Mcap Change



	Advanced	Declined	Unchanged	Total
All Category	171	162	61	394
A Category (Equity)	124	79	31	234
B Category (Equity)	30	55	17	102
N Category (Equity)	2	2	0	4
Z Category (Equity)	15	26	13	54
Mutual Funds	20	2	15	37
Corporate Bonds	0	2	0	2
Treasury Bonds	1	2	0	3

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,496,350	6,459,837	+0.6%
	Mn USD	55,054	54,744	
Turnover	Mn BDT	5,246	4,799	+9.3%
	Mn USD	44	41	
Volume	Mn Shares	131	150	-12.3%
No. of Trade		123,054	110,081	+11.8%

* Based on Traded Scrips

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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	1,281	+3.84	+0.30%	36	614,264	9.5%	314.1	7.4%	7.1x	0.6x	GP	308,814	8.7%	26.1	8.0x	3.9x
NBFI	1,155	1,112	+43.21	+3.89%	23	111,846	1.7%	94.7	2.2%	NM	NM	SQRPHARMA	184,914	5.2%	72.4	9.1x	1.5x
Mutual Fund	668	653	+15.27	+2.34%	37	31,196	0.5%	252.4	5.9%	NM	0.6x	BATBC	172,530	4.9%	99.9	9.9x	3.3x
General Insurance	2,932	2,888	+43.66	+1.51%	43	84,926	1.3%	152.9	3.6%	15.3x	1.3x	WALTONHIL	171,064	4.8%	14.9	13.2x	1.6x
Life Insurance	2,035	1,957	+78.03	+3.99%	15	54,090	0.8%	380.5	9.0%	NM	NM	ROBI	111,568	3.2%	19.4	29.2x	1.6x
Telecommunication	3,785	3,774	+11.07	+0.29%	3	438,257	6.8%	50.3	1.2%	9.9x	2.7x	BEXIMCO	103,842	2.9%	0.1	NM	1.2x
Pharmaceutical	3,086	3,063	+22.74	+0.74%	33	589,102	9.1%	653.7	15.4%	15.9x	1.7x	RENATA	83,098	2.3%	12.1	36.2x	2.6x
Fuel & Power	1,192	1,195	-2.70	-0.23%	23	313,888	4.9%	68.5	1.6%	20.5x	0.7x	BERGERPBL	82,135	2.3%	2.1	25.3x	6.1x
Cement	2,212	2,180	+32.10	+1.47%	7	105,636	1.6%	87.5	2.1%	15.3x	2.1x	LHBL	71,424	2.0%	57.0	12.6x	3.0x
Services & Real Estate	1,481	1,493	-11.80	-0.79%	9	81,884	1.3%	189.4	4.5%	25.7x	0.6x	UPGDCL	70,955	2.0%	1.9	9.5x	2.1x
Engineering	2,854	2,895	-40.92	-1.41%	42	329,760	5.1%	281.7	6.6%	13.8x	1.0x	BRACBANK	61,055	1.7%	138.5	6.9x	0.9x
Food & Allied	15,998	15,870	+127.47	+0.80%	21	293,717	4.5%	998.1	23.5%	15.6x	4.9x	UNILEVERCL	55,986	1.6%	537.1	64.9x	21.7x
IT	2,407	2,399	+7.30	+0.30%	11	31,661	0.5%	115.2	2.7%	26.1x	2.0x	ICB	54,377	1.5%	18.9	NM	1.3x
Textile	1,203	1,209	-5.51	-0.46%	58	124,818	1.9%	339.7	8.0%	NM	0.8x	ISLAMIBANK	52,486	1.5%	0.0	8.3x	0.7x
Paper & Printing	6,672	6,780	-108.48	-1.60%	6	30,609	0.5%	66.7	1.6%	47.3x	1.5x	BXPHARMA	47,065	1.3%	10.9	8.8x	1.0x
Tannery	2,337	2,383	-46.22	-1.94%	6	25,598	0.4%	106.4	2.5%	36.8x	2.5x	DUTCHBANGL	41,392	1.2%	3.4	5.1x	0.8x
Jute	15,695	16,108	-413.38	-2.57%	3	3,678	0.1%	23.5	0.6%	NM	NM	BEACONPHAR	35,782	1.0%	12.4	79.4x	5.8x
Ceramics	483	486	-2.83	-0.58%	5	21,437	0.3%	31.0	0.7%	41.9x	1.3x	POWERGRID	35,090	1.0%	1.1	NM	0.2x
Miscellaneous	4,182	4,188	-5.92	-0.14%	15	227,856	3.5%	26.7	0.6%	38.4x	1.8x	EBL	35,040	1.0%	2.5	5.4x	0.8x
Corporate Bond**	5,997	6,042	-45.39	-0.75%	16	41,493	0.6%	0.1	0.0%	NM	NM	BESTHLDNG	30,400	0.9%	20.9	22.1x	0.5x
Treasury Bond**	162	158	+4.32	+2.74%	240	2,915,570	45.1%	13.8	0.3%	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	
PRIME1ICBA	6.6	+10.0%	15.3	NM	1.1x	SQRPHARMA	121,789	7.0%	9.1x	1.5x	UNILEVERCL	2,904.7	+4.8%	537.1	64.9x	21.7x	
CAPMIBLMF	11.1	+9.9%	12.1	NM	1.2x	BATBC	74,086	4.3%	9.9x	3.3x	RUPALILIFE	198.4	+6.0%	235.0	NM	NM	
SICL	29.1	+9.8%	11.8	NM	1.0x	BEXIMCO	69,196	4.0%	NM	1.2x	BEACHHATCH	76.6	+0.5%	158.0	39.7x	6.1x	
GHCL	40.3	+9.8%	25.9	NM	0.9x	RENATA	68,042	3.9%	36.2x	2.6x	BRACBANK	34.5	+1.2%	138.5	6.9x	0.9x	
KPPL	21.7	+9.6%	25.0	NM	NM	BXPHARMA	45,564	2.6%	8.8x	1.0x	SEAPEARL	95.6	-0.8%	124.2	32.1x	4.9x	
SEMLIBLSF	6.9	+9.5%	0.6	NM	0.8x	GP	38,700	2.2%	8.0x	3.9x	CAPITECGBF	16.4	+6.5%	108.8	NM	1.7x	
IFILISLMF1	5.3	+8.2%	1.7	NM	1x	BEACONPHAR	34,036	2.0%	79.4x	5.8x	BATBC	319.5	-0.3%	99.9	9.9x	3.3x	
ICB	62.7	+7.5%	18.9	NM	1.3x	ISLAMIBANK	33,649	1.9%	8.3x	0.7x	ORIONPHARM	70.0	-1.4%	89.3	15.9x	0.8x	
TUNGHAI	4.4	+7.3%	0.7	NM	NM	BRACBANK	30,964	1.8%	6.9x	0.9x	ASIATICLAB	51.8	-2.8%	88.7	NM	1.0x	
ATLASBANG	75.8	+7.1%	2.6	NM	0.7x	LHBL	28,853	1.7%	12.6x	3.0x	FORTUNE	30.3	-2.9%	81.6	29.9x	2.1x	
						NBL	19,116	1.1%	NM	1.3x							
						PUBALIBANK	18,457	1.1%	4.0x	0.6x							
						CITYBANK	18,190	1.0%	3.9x	0.6x							
						OLYMPIC	16,818	1.0%	15.0x	2.4x							
						ROBI	15,714	0.9%	29.2x	1.6x							
						BSRMLTD	14,210	0.8%	4.6x	0.6x							
						BESTHLDNG	14,098	0.8%	22.1x	0.5x							
						PRIMEBANK	13,962	0.8%	4.8x	0.7x							
						UPGDCL	13,547	0.8%	9.5x	2.1x							
						SUMITPOWER	13,369	0.8%	30.1x	0.5x							

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)
FIRSTFIN	3.4	-8.1%	0.3	NM	NM	RENATA	776.0	776.0	1.0	677	525.66
LINDEBD	1,367.2	-3.0%	30.2	33.2x	4x	CAPITECGBF	15.5	15.0	24.0	5,184	78.49
SONALIPAPR	279.9	-3.0%	12.7	85.1x	1.6x	RUPALILIFE	195.0	184.0	17.0	354	67.40
AIL	110.7	-3.0%	27.8	44.8x	4.6x	BRACBANK	34.8	34.4	3.0	1,644	56.60
MONOSPOOL	166.1	-3.0%	8.1	62.1x	9.7x	AIL	125.5	110.7	9.0	443	51.09
SONALIANSH	270.8	-3.0%	22.8	31.5x	4.0x	LOVELLO	84.8	82.9	4.0	547	46.28
BIFC	9.8	-3.0%	1.5	NM	NM	BATBC	315.0	315.0	1.0	100	31.50
KBPPWBIL	108.2	-3.0%	0.8	NM	9.2x	DGIC	28.4	25.2	3.0	541	14.22
LEGACYFOOT	65.6	-3.0%	14.5	NM	6.0x	APEXFOOT	249.0	222.2	2.0	47	11.13
GEMINISEA	229.8	-3.0%	29.2	32.5x	10.5x	POPULARLIF	54.5	52.0	3.0	204	11.01

* 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
RENATA	776.0	776.0	525.7	677	1
CAPITECGBF	15.5	15.0	78.5	5,184	24
RUPALILIFE	195.0	184.0	67.4	354	17
BRACBANK	34.8	34.4	56.6	1,644	3
AIL	125.5	110.7	51.1	443	9
LOVELLO	84.8	82.9	46.3	547	4
BATBC	315.0	315.0	31.5	100	1
DGIC	28.4	25.2	14.2	541	3
APEXFOOT	249.0	222.2	11.1	47	2
POPULARLIF	54.5	52.0	11.0	204	3
ADNTEL	87.0	87.0	10.3	118	1
SAIFPOWER	20.7	20.7	9.2	445	1
EIL	38.1	38.1	8.6	225	1
BEACHHATCH	76.8	76.8	7.5	97	3
SAMORITA	70.8	70.8	7.1	100	1
GP	226.0	226.0	6.8	30	1
EMERALDOIL	43.1	43.0	5.6	130	2
ORIONINFU	526.8	500.0	4.5	9	4
MONNOCERA	72.8	72.8	4.2	58	1
GPHISPAT	28.0	25.9	4.2	154	2
DELTALIFE	82.0	82.0	4.0	49	1
AFTABAUTO	30.0	30.0	3.9	130	1
Total			998.6		115

Important DSE News
LOVELLO

The company has informed that Mr. Md. Moheuddin Sarder has been appointed as Company Secretary of the company with effect from July 01, 2024.

FIRSTFIN

The Board of Directors has recommended No dividend for the year ended December 31, 2023. Date of AGM: 12.09.2024, Time: 3:00 PM, Venue: Hybrid system meeting by using digital platform and physical presence. Physical meeting will be held at Trading Corporation of Bangladesh (TCB) Auditorium, 1 Karwanbazar (1st Floor), Dhaka-1215. Record Date: 22.07.2024. The Company has also reported EPS of Tk. (3.44), NAV per share of Tk. (31.71) and NOCFPS of Tk. 0.41 for the year ended December 31, 2023 as against Tk. (14.52), Tk. (28.84) and Tk. 0.39 respectively for the year ended December 31, 2022.

(Q1 Un-audited): EPS was Tk. (1.94) for January-March 2024 as against Tk. (1.91) for January-March 2023. NOCFPS was Tk. (0.24) for January-March 2024 as against Tk. (0.24) for January-March 2023. NAV per share was Tk. (33.64) as on March 31, 2024 and Tk. (30.75) as on March 31, 2023.

ROBI

The Company will be placed in 'A' category from existing 'B' category with effect from June 26, 2024 as the Company has reported disbursement of 10% Cash Dividend for the year ended December 31, 2023.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
DGIC		0.0%	5%	Record Date	15-Jul-24
FIRSTFIN		0.0%	0%	Record Date	22-Jul-24

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