

Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.16%) gained 60.88 points and closed at 5,302.72. The blue-chip index DS30 (+1.38%), the Shariah-based index DSES (+1.42%), and the large-cap index CDSET (+1.16%) closed at 1,903.84, 1,165.83, and 1,032.17 points, respectively. Most of the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 4.99% followed by Engineering (+4.60%), Pharmaceutical (+1.89%), Fuel & Power (+1.25%), Food & Allied (+1.15%), Bank (+0.25%), and NBF1 (-0.69%), respectively. Block trades contributed 20.2% of the overall market turnover. Unilever Consumer Care Limited (-0.8%) was the most traded share with a turnover of BDT 622 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,302.72	5,241.84	+60.88	+1.16%	-15.1%
DS30	1,903.84	1,877.94	+25.89	+1.38%	-9.1%
DSES	1,165.83	1,149.56	+16.28	+1.42%	-14.5%
CDSET	1,032.17	1,020.38	+11.79	+1.16%	-14.2%

	Advanced	Declined	Unchanged	Total
All Category	251	89	64	404
A Category (Equity)	168	46	31	245
B Category (Equity)	60	26	16	102
N Category (Equity)	4	0	0	4
Z Category (Equity)	19	17	17	53
Mutual Funds	12	9	16	37
Corporate Bonds	3	0	0	3
Treasury Bonds	4	5	0	9

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,550,229	6,496,350	+0.8%
	Mn USD	55,510	55,054	
Turnover	Mn BDT	6,051	5,246	+15.4%
	Mn USD	51	44	
Volume	Mn Shares	150	131	+14.0%
	No. of Trade	138,790	123,054	+12.8%

* Average Interbank Exchange Rate is BDT 118.00 as of Jun 26, 2024

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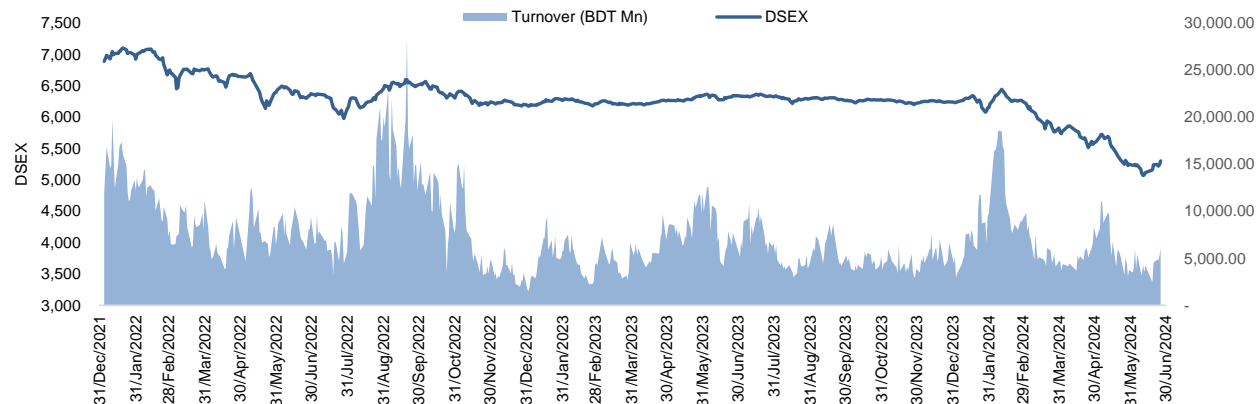


Figure: Sectorial Turnover (BDT Mn)

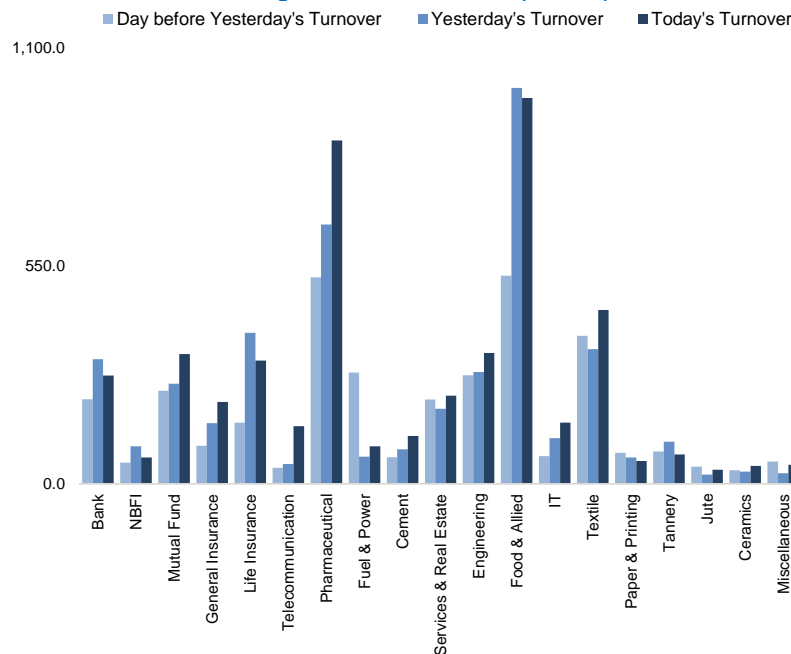
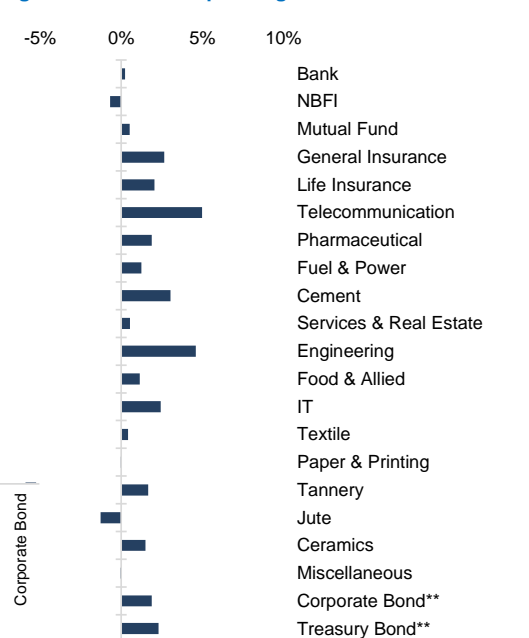


Figure: Sectorial Mcap Change



Market PE 14.0x
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	1,288	1,284	+3.18	+0.25%	36	615,787	9.4%	272.9	5.7%	7.1x	0.6x	GP	318,941	8.8%	46.8	8.3x	4.0x	
NBFI	1,147	1,155	-7.99	-0.69%	23	111,073	1.7%	66.5	1.4%	NM	NM	SQURPHARMA	185,623	5.1%	136.2	9.2x	1.5x	
Mutual Fund	671	668	+3.54	+0.53%	37	31,362	0.5%	327.1	6.8%	NM	0.6x	WALTONHIL	183,878	5.1%	56.7	14.2x	1.7x	
General Insurance	3,010	2,932	+77.74	+2.65%	43	87,177	1.3%	206.7	4.3%	15.7x	1.3x	BATBC	175,338	4.9%	73.4	10.0x	3.3x	
Life Insurance	2,076	2,035	+41.60	+2.04%	15	55,195	0.8%	310.8	6.4%	NM	NM	ROBI	122,568	3.4%	87.0	32.1x	1.8x	
Telecommunication	3,974	3,785	+188.88	+4.99%	3	460,126	7.1%	145.3	3.0%	10.4x	2.8x	BEXIMCO	103,842	2.9%	0.0	NM	1.2x	
Pharmaceutical	3,144	3,086	+58.20	+1.89%	33	600,211	9.2%	865.6	17.9%	16.2x	1.8x	RENATA	83,384	2.3%	40.0	36.3x	2.6x	
Fuel & Power	1,207	1,192	+14.89	+1.25%	23	317,809	4.9%	95.0	2.0%	20.8x	0.7x	BERGERPBL	82,010	2.3%	8.1	25.2x	6.1x	
Cement	2,279	2,212	+67.20	+3.04%	7	108,845	1.7%	120.6	2.5%	15.8x	2.2x	LHBL	73,050	2.0%	81.0	12.9x	3.1x	
Services & Real Estate	1,489	1,481	+8.04	+0.54%	9	82,328	1.3%	222.3	4.6%	25.8x	0.6x	UPGDCL	72,114	2.0%	1.3	9.6x	2.1x	
Engineering	2,986	2,854	+131.36	+4.60%	42	344,937	5.3%	330.2	6.8%	14.4x	1.1x	BRACBANK	61,232	1.7%	93.3	6.9x	0.9x	
Food & Allied	16,182	15,998	+184.21	+1.15%	21	297,099	4.6%	972.7	20.1%	15.8x	5.0x	UNILEVERCL	55,525	1.5%	622.1	64.3x	21.5x	
IT	2,465	2,407	+58.67	+2.44%	11	32,433	0.5%	154.6	3.2%	26.8x	2.1x	ICB	52,816	1.5%	9.2	NM	1.3x	
Textile	1,208	1,203	+5.13	+0.43%	58	125,350	1.9%	438.7	9.1%	NM	0.8x	ISLAMIBANK	52,486	1.5%	0.2	8.3x	0.7x	
Paper & Printing	6,670	6,672	-2.29	-0.03%	6	30,599	0.5%	57.7	1.2%	47.2x	1.5x	BXPHARMA	49,563	1.4%	54.0	9.3x	1.1x	
Tannery	2,376	2,337	+39.09	+1.67%	6	26,026	0.4%	74.3	1.5%	37.5x	2.5x	DUTCHBANGL	41,744	1.2%	9.3	5.2x	0.8x	
Jute	15,496	15,695	-198.93	-1.27%	3	3,631	0.1%	35.8	0.7%	NM	NM	BEACONPHAR	36,914	1.0%	26.2	81.9x	6.0x	
Ceramics	490	483	+7.24	+1.50%	5	21,758	0.3%	45.1	0.9%	42.5x	1.3x	POWERGRID	35,638	1.0%	1.6	NM	0.2x	
Miscellaneous	4,180	4,182	-1.61	-0.04%	15	227,768	3.5%	47.9	1.0%	38.4x	1.8x	EBL	35,312	1.0%	10.2	5.4x	0.8x	
Corporate Bond**	6,110	5,997	+113.15	+1.89%	16	41,954	0.6%	3.5	0.1%	NM	NM	BESTHLDNG	30,718	0.9%	23.3	22.3x	0.5x	
Treasury Bond**	166	162	+3.73	+2.30%	240	2,904,322	44.5%	36.9	0.8%	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
HEIDELBCEM	211.2	+10.0%	18.9	25.6x	2.8x	SQURPHARMA	121,789	7.0%	9.2x	1.5x	UNILEVERCL	2,880.8	-0.8%	622.1	64.3x	21.5x
ROBI	23.4	+9.9%	87.0	32.1x	1.8x	BATBC	74,086	4.3%	10.0x	3.3x	CAPITECGBF	16.6	+1.2%	213.8	NM	1.7x
KARNAPHULI	33.8	+9.0%	49.6	17.8x	1.5x	BEXIMCO	69,196	4.0%	NM	1.2x	AIL	110.9	+0.2%	165.2	44.9x	4.6x
UNIONCAP	7.4	+8.8%	6.1	NM	NM	RENATA	68,042	3.9%	36.3x	2.6x	SEAPEARL	93.8	-1.9%	143.8	31.5x	4.8x
RUNNERAUTO	24.7	+8.3%	3.2	NM	0.4x	BXPHARMA	45,564	2.6%	9.3x	1.1x	PRAGATILIF	141.6	+5.2%	142.6	NM	NM
SICL	31.5	+8.2%	14.1	NM	1.0x	GP	38,700	2.2%	8.3x	4.0x	SQURPHARMA	209.4	+0.4%	136.2	9.2x	1.5x
WATACHEM	137.3	+8.1%	5.7	52.6x	2x	BEACONPHAR	34,036	2.0%	81.9x	6.0x	LOVELLO	89.7	+2.5%	105.3	65.0x	6.8x
ORIONINFU	508.1	+7.8%	83.5	NM	34.1x	ISLAMIBANK	33,649	1.9%	8.3x	0.7x	ORIONPHARM	71.0	+1.4%	96.4	16.2x	0.8x
WALTONHIL	607.0	+7.5%	56.7	14.2x	1.7x	BRACBANK	30,964	1.8%	6.9x	0.9x	BRACBANK	34.6	+0.3%	93.3	6.9x	0.9x
TITASGAS	22.9	+6.5%	7.7	NM	0.3x	LHBL	28,853	1.7%	12.9x	3.1x	ROBI	23.4	+9.9%	87.0	32.1x	1.8x

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)
LINDEBD	1,326.2	-3.0%	28.6	32.2x	3.4x	PUBALIBANK	18,457	1.1%	4.1x	0.6x	RENATA	765.0	765.0	1.0	764	584.46
GHCL	39.1	-3.0%	30.0	NM	1x	CITYBANK	18,190	1.0%	3.8x	0.6x	PRAGATILIF	136.1	130.6	9.0	553	74.39
SHYAMPSUG	147.1	-3.0%	0.5	NM	NM	OLYMPIC	16,818	1.0%	15.4x	2.5x	BSRMLTD	180.0	177.0	9.0	306	54.86
KBPPWBIL	105.0	-3.0%	0.8	NM	8.9x	ROBI	15,714	0.9%	32.1x	1.8x	FINEFOODS	17.5	16.0	10.0	3,051	48.97
SUNLIFEINS	46.8	-2.9%	2.3	NM	NM	BESTHLDNG	14,098	0.8%	22.3x	0.5x	CAPITECGBF	204.0	192.5	8.0	179	35.23
ICB	60.9	-2.9%	9.2	NM	1.3x	PRIMEBANK	13,962	0.8%	4.8x	0.7x	RUPALILIFE	90.2	84.9	10.0	367	31.56
SAMATALETH	54.4	-2.9%	4.7	NM	3.8x	UPGDCL	13,547	0.8%	9.6x	2.1x	LOVELLO	39.7	39.7	1.0	769	30.52
PDL	10.5	-2.8%	16.1	NM	0.8x	SUMITPOWER	13,369	0.8%	30.6x	0.5x	AIL	117.6	107.4	5.0	269	30.01
SKTRIMS	24.6	-2.8%	4.7	18.6x	1.5x						ACIFORMULA	119.1	119.1	1.0	250	29.78
KPPL	21.1	-2.8%	9.0	NM	NM						ADNTEL	96.0	88.0	6.0	299	27.42

* 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	765.0	765.0	584.5	764	1
PRAGATILIF	136.1	130.6	74.4	553	9
FINEFOODS	180.0	177.0	54.9	306	9
CAPITECGBF	17.5	16.0	49.0	3,051	10
RUPALILIFE	204.0	192.5	35.2	179	8
LOVELLO	90.2	84.9	31.6	367	10
EIL	39.7	39.7	30.5	769	1
AIL	117.6	107.4	30.0	269	5
ACIFORMULA	119.1	119.1	29.8	250	1
ADNTEL	96.0	88.0	27.4	299	6
LINDEBD	1,392.4	1,375.4	19.0	14	26
ICBIBANK	3.4	3.4	17.0	5,000	1
JMISMDL	141.2	141.0	16.8	119	4
MARICO	2,121.0	2,121.0	15.6	7	2
BATBC	330.1	315.6	14.4	44	5
GSPFINANCE	8.9	8.9	13.0	1,458	2
CENTRALINS	50.0	50.0	10.5	209	1
EBL	26.1	26.1	10.4	400	1
KEYACOSMET	4.0	4.0	10.4	2,600	2
BEXIMCO	115.3	104.1	10.0	88	6
MEGHNACEM	78.5	78.1	7.5	96	6
MEGHNAINS	29.0	29.0	7.5	260	3
Total			1,220.8		187

Important DSE News
SONALILIFE

The administrator of the company has informed that as per Regulation no. 19 of the Dhaka Stock Exchange (Listing) Regulations, 2015 and section 189 of Company Law 1994, the company is supposed to authenticate the Financial Statements & adopt the same by the Board of Directors. Under a special circumstance, the Board of the company has been suspended as well as an Administrator has been appointed as per letter dated 18.04.2024 of Insurance Development & Regulatory Authority (IDRA). In absence of the Board, it is not possible to authenticate the accounts and adopt financial statements accordingly.

BATBC

The company has informed that the Board of Directors of the company has appointed Mr. Wael Sabra as the Chairman of the Board of Directors of the Company with effect from August 01, 2024.

DHAKAINS

The company has informed that Insurance Development and Regulatory Authority has approved the appointment of Mr. Bayezid Mujtaba Siddiqui as Chief Executive Officer of the company.

ROBI

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Robi Axiata PLC.' instead of 'Robi Axiata Limited' with effect from June 27, 2024. Other things (except name) will remain unchanged.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
POPULARLIF		0.0%	37%	Record Date	25-Jul-24
SICL		0.0%	3%	Record Date	25-Jul-24

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