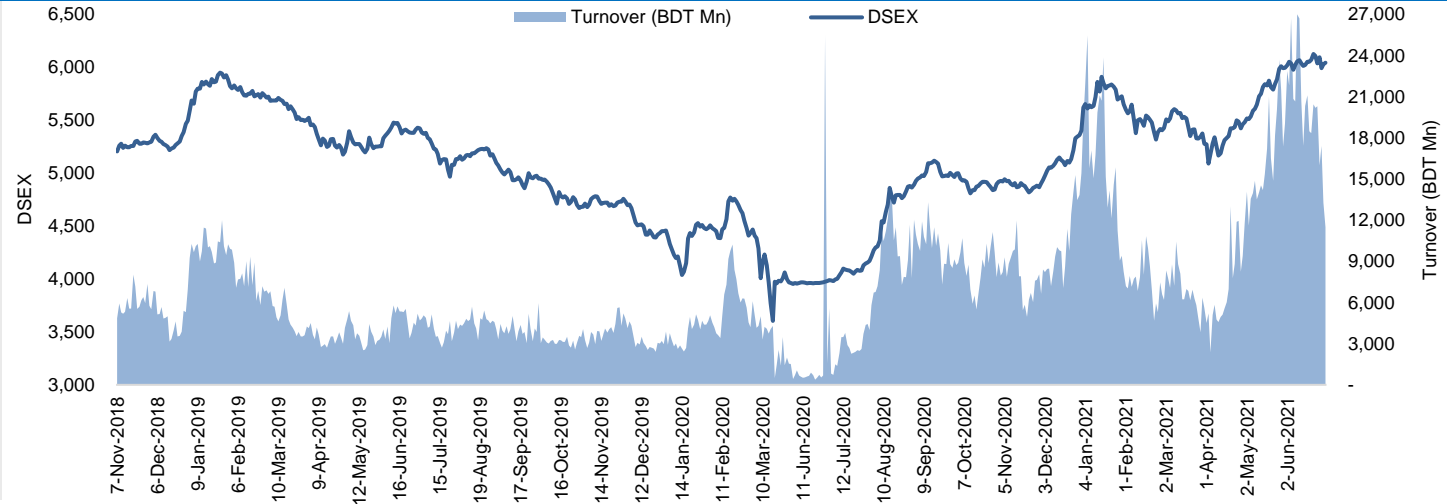


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.57%) gained 33.92 points and closed at 6,026.65. The blue-chip index DS30 (+0.37%), the Shariah-based index DSES (+0.57%), and the large-cap index CDSET (+0.38%) closed at 2,176.64, 1,294.81, and 1,215.22 points, respectively. All the large-cap sectors posted positive performance today. NBFI booked the highest gain of 1.45% followed by Engineering (+0.78%), Pharmaceutical (+0.52%), Fuel & Power (+0.44%), Food & Allied (+0.37%), Telecommunication (+0.15%), and Bank (+0.09%), respectively. Block trades contributed 7.9% of the overall market turnover. Delta Life Insurance Company Ltd. (+10.0%) was the most traded share with a turnover of BDT 1,366 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,042.50	6,026.65	+15.85	+0.26%	+11.9%
DS30	2,185.83	2,176.64	+9.18	+0.42%	+11.3%
DSES	1,298.40	1,294.81	+3.59	+0.28%	+4.5%
CDSET	1,220.12	1,215.22	+4.90	+0.40%	+8.6%

	Advanced	Declined	Unchanged	Total
All Category	175	166	32	373
A Category (Equity)	115	128	28	271
B Category (Equity)	29	28	2	59
N Category (Equity)	2	8	1	11
Z Category (Equity)	29	2	1	32
Mutual Funds	18	2	16	36
Corporate Bonds	0	2	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,074,618	5,063,090	+0.2%
	Mn USD	59,729	59,594	
Turnover	Mn BDT	11,481	13,285	-13.6%
	Mn USD	135	156	
Volume	Mn Shares	427	417	+2.5%
No. of Trade		215,201	215,885	-0.3%

Figure: Sectorial Turnover (BDT Mn)

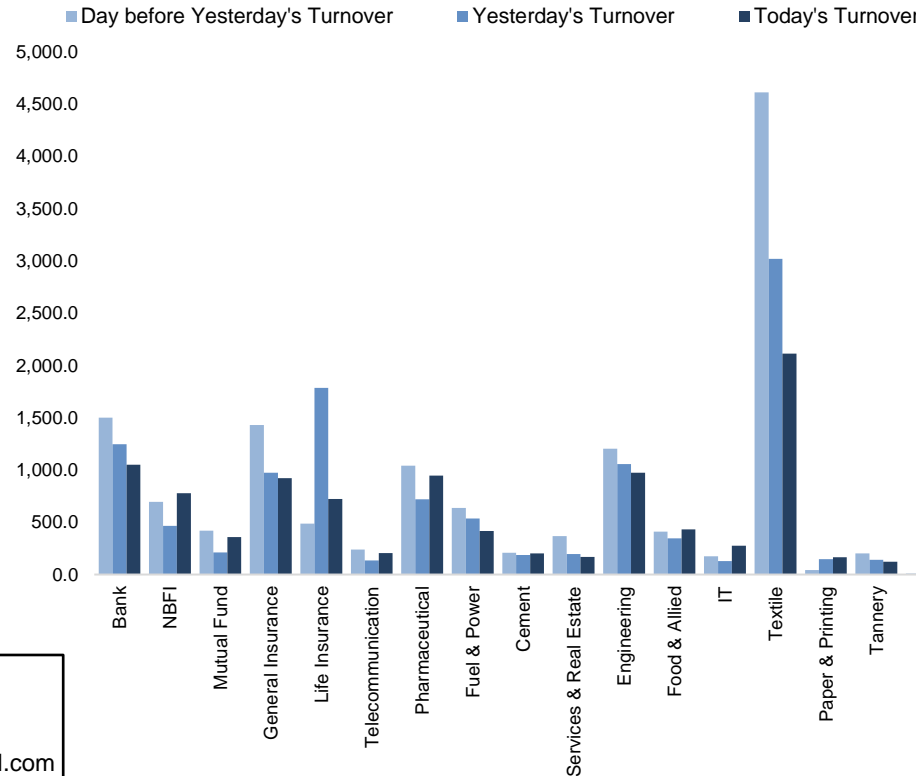
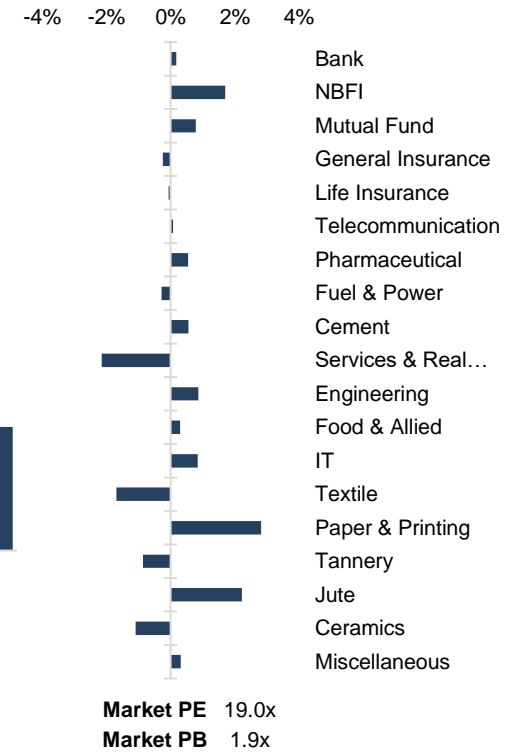


Figure: Sectorial Mcap Change



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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	1,524	1,522	+2.68	+0.18%	31	658,625	14.7%	1,051.3	9.4%	8.7x	0.8x	GP	469,229	10.4%	41.0	13.3x	7.7x
NBFI	2,094	2,059	+35.00	+1.70%	23	205,712	4.6%	777.0	7.0%	44.8x	3.2x	WALTONHIL	403,652	9.0%	16.9	40.4x	7.1x
Mutual Fund	1,017	1,009	+7.95	+0.79%	37	45,880	1.0%	357.6	3.2%	NM	0.9x	BATBC	288,522	6.4%	105.6	24.6x	7.6x
General Insurance	5,287	5,299	-12.69	-0.24%	38	136,732	3.0%	920.6	8.3%	25.5x	2.5x	ROBI	225,755	5.0%	128.3	NM	3.4x
Life Insurance	2,721	2,723	-1.75	-0.06%	12	74,396	1.7%	721.2	6.5%	NM	NM	SQURPHARMA	189,523	4.2%	102.1	13.1x	2.2x
Telecommunication	6,154	6,149	+4.88	+0.08%	3	722,985	16.1%	206.1	1.9%	18.6x	5.4x	UPGDCL	158,663	3.5%	20.0	16.4x	5.2x
Pharmaceutical	3,455	3,437	+18.59	+0.54%	31	629,545	14.0%	944.5	8.5%	20.7x	2.6x	RENATA	128,154	2.9%	20.6	27.9x	5.3x
Fuel & Power	1,677	1,682	-4.78	-0.28%	22	448,479	10.0%	414.8	3.7%	12.2x	1.4x	ICB	91,621	2.0%	46.4	44.2x	2.1x
Cement	1,997	1,986	+11.08	+0.56%	7	117,243	2.6%	202.1	1.8%	20.5x	2.5x	BERGERPBL	81,625	1.8%	7.2	33.0x	8.4x
Services & Real Estate	1,024	1,046	-22.52	-2.15%	8	39,767	0.9%	167.1	1.5%	NM	0.8x	BEXIMCO	80,032	1.8%	673.6	22.0x	1.2x
Engineering	4,874	4,832	+41.87	+0.87%	42	594,972	13.2%	974.0	8.8%	29.6x	2.7x	BXPBARMA	78,471	1.7%	90.1	17.2x	2.2x
Food & Allied	21,117	21,054	+63.13	+0.30%	20	382,081	8.5%	432.1	3.9%	32.5x	8.0x	MARICO	70,028	1.6%	14.8	22.5x	42.8x
IT	2,643	2,621	+22.22	+0.85%	11	31,379	0.7%	276.3	2.5%	29.0x	2.2x	BRACBANK	68,356	1.5%	34.3	14.1x	1.4x
Textile	1,373	1,397	-23.66	-1.69%	58	145,058	3.2%	2,111.7	19.0%	NM	0.9x	LHBL	67,708	1.5%	113.1	23.6x	3.7x
Paper & Printing	5,186	5,044	+142.09	+2.82%	6	14,857	0.3%	165.1	1.5%	39.9x	1.0x	DUTCHBANGL	47,190	1.1%	119.8	8.3x	1.4x
Tannery	1,962	1,979	-17.10	-0.86%	6	21,409	0.5%	123.4	1.1%	NM	2.2x	SUMITPOWER	46,346	1.0%	34.1	8.3x	1.3x
Jute	7,971	7,798	+173.16	+2.22%	3	1,965	0.0%	11.7	0.1%	NM	14.3x	ISLAMIBANK	45,724	1.0%	5.2	9.5x	0.7x
Ceramics	514	520	-5.65	-1.09%	5	26,092	0.6%	86.8	0.8%	55.9x	1.7x	TITASGAS	34,029	0.8%	8.0	9.4x	0.5x
Miscellaneous	3,857	3,844	+12.15	+0.32%	14	194,528	4.3%	1,182.1	10.6%	29.1x	1.9x	OLYMPIC	33,790	0.8%	18.5	16.3x	3.8x
												UNILEVERCL	33,296	0.7%	2.1	70.6x	22.5x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ZEALBANGLA	108.9	+10.0%	0.5	NM	NM
JUTESPINN	121.2	+10.0%	1.3	NM	NM
MONOSPOOL	171.9	+10.0%	20.4	NM	4.2x
SAVAREFR	203.2	+10.0%	1.8	NM	92.8x
KAY&QUE	207.8	+9.9%	20.8	NM	2.7x
SHYAMPSUG	58.6	+9.9%	1.2	NM	NM
PAPERPROC	54.2	+9.9%	0.1	NM	2.0x
DELTALIFE	141.9	+9.9%	425.5	NM	NM
KPPL	14.6	+9.8%	67.7	NM	1.2x
TAMIJTEX	40.5	+9.8%	0.0	NM	0.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	124,005	7.7%	13.1x	2.2x
BATBC	76,314	4.7%	24.6x	7.6x
RENATA	62,565	3.9%	27.9x	5.3x
BEXIMCO	55,582	3.5%	22.0x	1.2x
BXPBARMA	54,789	3.4%	17.2x	2.2x
GP	46,923	2.9%	13.3x	7.7x
BRACBANK	36,748	2.3%	14.1x	1.4x
LHBL	23,914	1.5%	23.6x	3.7x
EBL	22,910	1.4%	7.2x	0.9x
ROBI	22,463	1.4%	NM	3.4x
ISLAMIBANK	22,259	1.4%	9.5x	0.7x
OLYMPIC	20,497	1.3%	16.3x	3.8x
BEACONPHAR	19,937	1.2%	28.2x	5.4x
CITYBANK	18,696	1.2%	6.0x	0.9x
PUBALIBANK	17,471	1.1%	6.9x	0.7x
SUMITPOWER	17,051	1.1%	8.3x	1.3x
NBL	16,718	1.0%	6.8x	0.5x
UPGDCL	15,866	1.0%	16.4x	5.2x
PRIMEBANK	15,466	1.0%	8.9x	0.9x
ALARABANK	14,176	0.9%	10.6x	1.0x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	89.1	+0.8%	673.6	22.0x	1.2x
DELTALIFE	141.9	+9.9%	425.5	NM	NM
MALEKSPIN	29.9	-6.3%	240.6	NM	0.7x
NFML	39.1	+1.6%	240.5	30.3x	3.0x
ANWARGALV	203.5	+2.5%	211.9	76.2x	17.7x
GENEXIL	91.0	+4.1%	196.4	29.8x	4.9x
QUEENSOUTH	30.3	-5.3%	157.7	50.6x	1.9x
KEYACOSMET	7.9	+5.3%	155.5	NM	0.6x
LANKABAFIN	35.1	+0.9%	151.7	19.4x	2.0x
NEWLINE	30.4	-0.7%	143.5	22.3x	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PRAGATILIF	110.1	-9.5%	43.3	NM	NM
SONARGAON	26.0	-7.1%	25.3	NM	1.1x
MALEKSPIN	29.9	-6.3%	240.6	NM	0.7x
POPULARLIF	110.1	-5.7%	68.4	NM	NM
QUEENSOUTH	30.3	-5.3%	157.7	50.6x	1.9x
SEAPEARL	39.8	-5.0%	52.5	52.2x	3.6x
MATINSPIINN	51.8	-5.0%	73.8	11.5x	1.1x
ESQUIRENIT	39.5	-4.8%	40.3	28.4x	1.1x
PRIMETEX	21.2	-4.5%	11.1	NM	0.3x
FAREASTLIF	61.2	-4.1%	14.4	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
AIL	37.4	37.4	0.5	14	1
ASIAINS	105.0	105.0	1.1	11	1
BATBC	536.0	536.0	0.6	1	1
BDFINANCE	47.5	46.0	23.9	510	5
BNICL	131.0	131.0	12.2	93	1
BXPBARMA	173.0	173.0	36.2	209	4
DELTALIFE	142.0	135.0	8.7	62	5
DUTCHBANGL	97.0	97.0	0.6	7	1
EASTERNINS	122.4	122.0	27.5	225	2
EBL	31.5	31.5	1.9	60	1

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
FORTUNE	48.9	45.0	3.8	83	2
GENEXIL	93.5	93.5	0.5	5	1
GREENDELT	120.0	120.0	0.9	8	1
INDEXAGRO	110.0	95.0	2.9	29	2
ISLAMICFIN	24.2	24.2	0.6	24	1
KAY&QUE	200.0	200.0	2.0	10	2
KDSALTD	49.5	49.0	1.9	39	2
KPPL	14.6	14.6	1.5	100	1
LANKABAFIN	36.0	36.0	1.1	30	1
MAKSONSPIN	21.1	21.1	3.0	144	1
MARICO	2,220.0	2,220.0	1.1	1	1
NEWLINE	30.9	30.9	19.2	620	1
NORTHRNINS	61.3	61.3	0.6	10	1
NRBCBANK	35.1	32.9	17.3	497	3
NTC	550.7	550.7	14.3	26	1
PARAMOUNT	93.5	93.5	4.7	50	1
PDL	14.0	14.0	5.8	415	1
PHOENIXFIN	33.4	32.9	40.3	1,217	2
PIONEERINS	170.0	170.0	1.0	6	1
PURABIGEN	50.5	50.5	0.6	11	1
RDFOOD	33.9	33.5	4.4	130	2
RECKITBEN	4,370.0	4,370.0	0.9	1	1
RENATA	1,317.0	1,317.0	1.3	1	1
ROBI	43.0	43.0	25.8	600	2
RUPALIBANK	40.2	40.2	17.6	438	2
RUPALIINS	40.0	39.0	8.3	212	2
SAFKOSPINN	25.0	25.0	20.0	800	1
SALVOCHEM	34.0	34.0	2.0	59	1
SONALIPAPR	233.5	233.5	11.9	51	1
SQURPHARMA	215.0	214.0	13.8	65	3
STANDARINS	73.0	73.0	12.4	170	1
Total			354.8		66

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PHENIXINS	-	0.0%	15.0%	Record Date	30-Jun-21
PRAGATIINS	-	0.0%	30.0%	Record Date	30-Jun-21
UCB	-	5.0%	5.0%	Record Date	30-Jun-21
DHAKAINS	-	0.0%	20.0%	Record Date	04-Jul-21

Important DSE News

PRAGATILIF

The Board of Directors has recommended 12% cash dividend for the year ended on December 31, 2020. Date of AGM: 12.08.2021, Time: 12:00 Noon, Venue: Digital Platform. Record Date: 19.07.2021. (Q1 Un-audited): Increase in life revenue account for Jan-Mar 2021 was Tk. 21.41 million with total life insurance fund of Tk. 5,966.21 million as against increase in life revenue account of Tk. 12.18 million and Tk. 5,695.66 million respectively for the same period of the previous year.

JAMUNABANK

Mr. Arifur Rahman, one of the Sponsors of Jamuna Bank Ltd., has expressed his intention to sell 19,00,000 shares out of his total holding of 23,43,382 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

SAPORTL

(Q3 Un-audited): Consolidated EPS was Tk. 0.14 for January-March 2021 as against Tk. 0.17 for January-March 2020; Consolidated EPS was Tk. 0.55 for July 2020-March 2021 as against Tk. 0.36 for July 2019-March 2020. Consolidated NOCFPS was Tk. 1.19 for July 2020-March 2021 as against Tk. 0.46 for July 2019-March 2020. Consolidated NAV per share was Tk. 32.98 as on March 31, 2021 and Tk. 33.83 as on June 30, 2020.

BANKASIA

Ms. Mahrina Chowdhury, one of the Sponsors of the Company, has expressed her intention to buy 5,50,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

Ms. Sabrina Chowdhury, one of the Sponsors of the Company, has expressed her intention to buy 5,50,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

DBH1STMF

The Trustee Board of the Fund has declared No dividend based on the Net Loss for the year ended June 30, 2020. The Fund has reported EPU of Tk. (1.08), NAV per unit at market price of Tk. 9.08, NAV per unit at cost of Tk. 10.02 and NOCFPU of Tk. 1.48 for the year ended on June 30, 2020 as against Tk. 0.86, Tk. 11.27, Tk. 10.96 and Tk. (0.07) respectively for the same period of the previous year.

AGRANINS

The Board has recommended to issue 1R:3 rights share (1 rights share for every 3 shares) with an issue price of Tk. 10.00 each per share subject to the approval of the Shareholders in the EGM and BSEC. Reasons for declaration of right shares: Increased of paid-up capital for requirement of Regulatory bodies. Insurance Development and Regulatory Authority (IDRA). For non-life insurance business: In the case of Companies incorporated in Bangladesh: At least Taka 40 (forty) crore of which 60 (sixty) percent shall be subscribed by the sponsors and the remaining 40 (forty) percent shall remain open for public subscription. Date of EGM: 11.08.2021. Time: 11:00 AM, Venue: Digital Platform. Record date for EGM: 19.07.2021. Another record date for entitlement of the proposed rights shares will be notified later after obtaining approval from BSEC.

CNW

Trading of the shares of Sonali Life Insurance Company Limited will commence at DSE from June 30, 2021 under 'N' category. DSE Trading Code for Sonali Life Insurance Company Limited is "SONALILIFE" and DSE Company Code is 25751.

Sonali Life Insurance Company Limited: (annual): As per audited annual financial statements for the year ended on 31 December 2020, the Company has reported an increase in life insurance fund of Tk. 583.71 million as against Tk. 351.85 million for the same period of the previous year. Total life insurance fund stood at Tk. 1,537.05 million as on 31 December 2020 as against Tk. 953.34 million as on 31 December 2019. Audited Annual Financials of Sonali Life Insurance Company Limited: Pre-IPO Net Asset Value (NAV) per share (considering Pre-IPO paid up shares) would be Tk. 25.56 as on 31 December 2020 and the same would be Tk. 15.33 (considering Post-IPO paid up shares). Pre-IPO paid-up number of shares for the year ended on 31 December 2020 was 28,500,000 which was same for the same period of the previous year and Post-IPO paid-up number of shares would be 47,500,000.

DHAKABANK

Refer to their earlier news disseminated by DSE on 16.06.2021 regarding "Board Decision to issue Contingent-Convertible Perpetual Bond", the Company has further informed that the shareholders of the Company in the 26th AGM held on June 29, 2021 have approved the issuance of "Perpetual Bond" for raising Tk.400.00 Crore only through issuance of Contingent-Convertible Perpetual Bond as Additional Tier-I (AT-I) Capital to support the Bank's Basel-III compliance in line with Bangladesh Bank Guidelines on Risk Based Capital Adequacy of December, 2014 subject to approval of regulatory authorities.