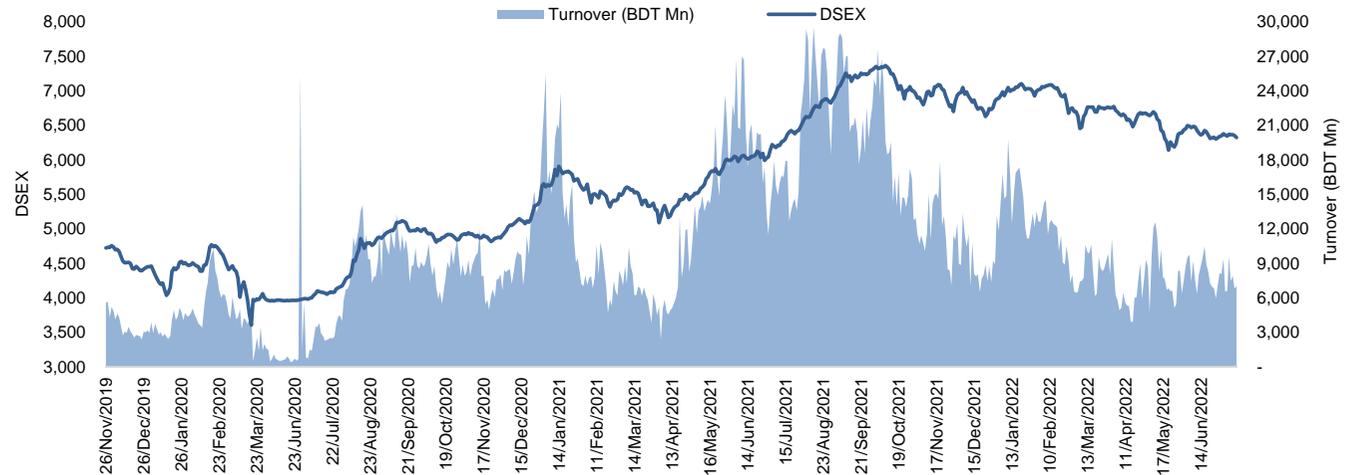


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.48%) lost 30.68 points and closed at 6,324.81. The blue-chip index DS30 (-0.49%), the Shariah-based index DSES (-0.57%), and the large-cap index CDSET (-0.45%) closed at 2,272.96, 1,377.72, and 1,248.91 points, respectively. All the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 0.89% followed by Pharmaceutical (-0.38%), Fuel & Power (-0.29%), NBFi (-0.26%), Engineering (-0.24%), Food & Allied (-0.18%), and Bank (-0.17%), respectively. Block trades contributed 0.8% of the overall market turnover. Fortune Shoes Limited (-1.9%) was the most traded share with a turnover of BDT 498 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,324.81	6,355.49	-30.68	-0.48%	-6.4%
DS30	2,272.96	2,284.14	-11.18	-0.49%	-10.3%
DSES	1,377.72	1,385.63	-7.91	-0.57%	-3.7%
CDSET	1,248.91	1,254.51	-5.60	-0.45%	-8.1%

	Advanced	Declined	Unchanged	Total
All Category	77	259	45	381
A Category (Equity)	51	179	33	263
B Category (Equity)	19	62	8	89
N Category (Equity)	1	5	0	6
Z Category (Equity)	6	13	4	23
Mutual Funds	5	14	16	35
Corporate Bonds	0	3	1	4

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,161,022	5,179,178	
	Mn USD	55,228	55,422	-0.4%
Turnover	Mn BDT	7,023	6,795	+3.4%
	Mn USD	75	73	
Volume	Mn Shares	182	189	-3.8%
No. of Trade		139,892	136,334	+2.6%

* Exchange Rate is BDT 93.45 as of Jul 13, 2022

Figure: Sectorial Turnover (BDT)

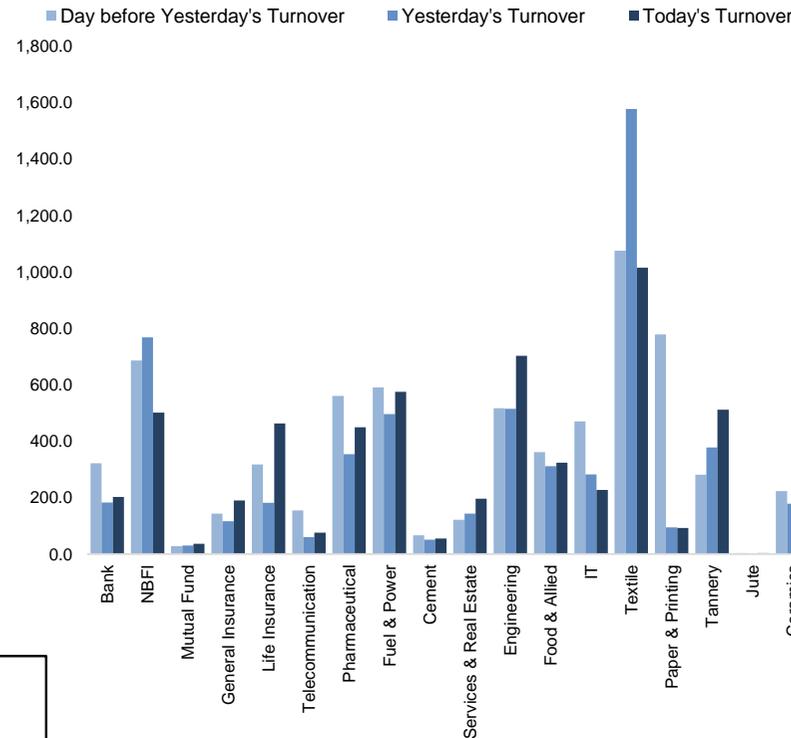
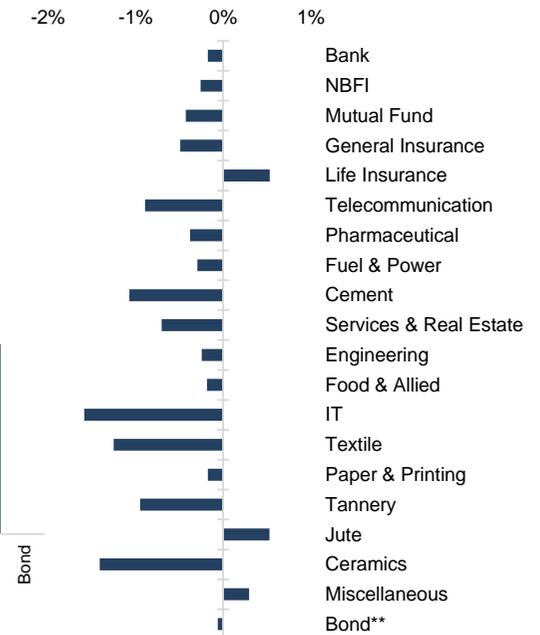


Figure: Sectorial Mcap Change



Market PE 15.8x
Market PB 1.7x

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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	1,442	1,445	-2.51	-0.17%	33	665,239	14.6%	202.2	3.1%	7.9x	0.8x	GP	388,616	8.6%	52.0	11.7x	6.7x
NBFI	2,015	2,020	-5.20	-0.26%	23	198,494	4.4%	501.6	7.6%	NM	3.6x	WALTONHIL	328,223	7.2%	1.4	22.9x	3.4x
Mutual Fund	884	887	-3.78	-0.43%	36	38,941	0.9%	36.3	0.5%	NM	0.8x	BATBC	291,168	6.4%	23.5	19.1x	8.9x
General Insurance	3,297	3,313	-16.15	-0.49%	41	97,450	2.1%	190.5	2.9%	15.5x	1.6x	SQURPHARMA	190,498	4.2%	30.9	10.3x	1.9x
Life Insurance	2,343	2,330	+12.43	+0.53%	13	67,517	1.5%	462.8	7.0%	NM	NM	ROBI	179,661	4.0%	6.9	98.0x	2.7x
Telecommunication	5,135	5,181	-46.05	-0.89%	3	604,623	13.3%	75.7	1.1%	16.1x	4.5x	UPGDCL	143,475	3.2%	4.0	11.6x	4.4x
Pharmaceutical	3,741	3,755	-14.11	-0.38%	32	702,452	15.4%	449.9	6.8%	17.3x	2.5x	RENATA	142,406	3.1%	4.9	25.7x	5.0x
Fuel & Power	1,819	1,825	-5.35	-0.29%	23	474,910	10.4%	574.6	8.7%	11.9x	1.2x	BEXIMCO	112,782	2.5%	420.2	7.8x	1.5x
Cement	2,430	2,457	-26.25	-1.07%	7	117,128	2.6%	55.4	0.8%	24.8x	2.5x	BERGERPBL	82,344	1.8%	1.7	28.3x	7.8x
Services & Real Estate	1,422	1,432	-10.05	-0.70%	8	53,758	1.2%	196.4	3.0%	74.8x	1.0x	ICB	79,373	1.7%	3.1	44.9x	1.8x
Engineering	4,681	4,693	-11.44	-0.24%	42	548,133	12.1%	702.7	10.6%	19.0x	1.9x	LHBL	79,206	1.7%	34.9	20.9x	4.5x
Food & Allied	21,928	21,969	-40.63	-0.18%	21	389,393	8.6%	323.5	4.9%	23.8x	9.1x	MARICO	75,830	1.7%	1.1	21.3x	28.2x
IT	2,654	2,696	-42.70	-1.58%	11	34,000	0.7%	227.5	3.4%	27.6x	2.4x	BXPBARMA	67,274	1.5%	32.0	11.7x	1.7x
Textile	1,629	1,650	-20.61	-1.25%	58	175,761	3.9%	1,015.6	15.3%	26.4x	1.1x	BEACONPHAR	58,582	1.3%	10.7	62.6x	10.0x
Paper & Printing	7,865	7,878	-13.78	-0.17%	6	28,789	0.6%	92.5	1.4%	NM	2.0x	BRACBANK	57,619	1.3%	28.2	10.9x	1.1x
Tannery	3,153	3,183	-30.17	-0.95%	6	33,672	0.7%	511.7	7.7%	47.6x	3.3x	ISLAMIBANK	52,325	1.2%	0.9	10.6x	0.8x
Jute	8,686	8,640	+45.67	+0.53%	3	2,002	0.0%	2.9	0.0%	NM	28.2x	DUTCHBANGL	45,085	1.0%	3.9	7.8x	1.2x
Ceramics	779	790	-11.12	-1.41%	5	34,722	0.8%	328.9	5.0%	32.6x	2.1x	TITASGAS	44,515	1.0%	342.3	13.3x	0.6x
Miscellaneous	4,399	4,386	+13.04	+0.30%	15	243,936	5.4%	672.8	10.2%	12.0x	2.1x	POWERGRID	40,554	0.9%	13.8	11.1x	0.4x
Bond**	90	90	-0.05	-0.06%	9	37,357	0.8%	2.1	0.0%	NM	NM	SUMITPOWER	39,618	0.9%	8.9	9.4x	1.1x

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
MEGCONMILK	32.1	+9.6%	17.9	NM	NM	SQURPHARMA	124,643	7.3%	10.3x	1.9x	FORTUNE	87.9	-1.9%	497.8	28.4x	5.8x
LIBRAINFU	922.0	+7.5%	24.4	NM	0.7x	BATBC	77,014	4.5%	19.1x	8.9x	BEXIMCO	128.7	-1.1%	420.2	7.8x	1.5x
ECABLES	203.6	+7.2%	54.1	NM	24.6x	BEXIMCO	75,169	4.4%	7.8x	1.5x	IPDC	63.9	+1.1%	352.6	26.4x	3.6x
MEGHNAPET	36.7	+4.9%	8.3	NM	NM	RENATA	69,394	4.1%	25.7x	5.0x	TITASGAS	45.0	+1.4%	342.3	13.3x	0.6x
USMANIAGL	75.9	+4.7%	8.3	70.9x	0.9x	BXPBARMA	46,970	2.8%	11.7x	1.7x	DELTALIFE	149.2	+2.8%	331.6	NM	NM
NLTUBES	85.7	+4.3%	20.0	NM	0.6x	BEACONPHAR	41,007	2.4%	62.6x	10.0x	SPCERAMICS	48.5	-0.6%	203.9	NM	1.5x
SUNLIFEINS	52.0	+3.6%	34.2	NM	NM	GP	38,862	2.3%	11.7x	6.7x	GOLDENSON	19.5	+2.1%	136.3	32.0x	1.0x
FINEFOODS	47.9	+3.5%	18.1	NM	4.5x	BRACBANK	30,976	1.8%	10.9x	1.1x	FUWANGFOOC	25.8	-1.9%	98.8	NM	2.2x
BERGERPBL	1,775.5	+3.0%	1.7	28.3x	7.8x	LHBL	27,975	1.6%	20.9x	4.5x	JHRML	79.5	-0.5%	86.1	26.8x	2.6x
DELTALIFE	149.2	+2.8%	331.6	NM	NM	ISLAMIBANK	25,472	1.5%	10.6x	0.8x	SEAPEARL	46.6	+0.9%	81.6	97.5x	4.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	Pubalibank	CITYBANK	ROBI	BSRMLTD	OLYMPIC	ALARABANK	SUMITPOWER	UPGDCL	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ROBI	34.3	-2.0%	6.9	98.0x	2.7x	18,652	18,314	18,180	17,966	15,442	15,197	15,104	14,576	14,347	IPDC	63.3	62.0	11.0	2,909	182.19
ADVENT	24.5	-2.0%	17.1	20.8x	1.7x	PUBALIBANK	18,314	18,180	17,966	15,442	15,197	15,104	14,576	14,347	FORTUNE	98.5	87.9	3.0	937	91.24
ORIONPHARM	83.4	-2.0%	47.0	20.3x	1.0x	CITYBANK	18,180	18,180	17,966	15,442	15,197	15,104	14,576	14,347	CITYBANK	22.5	22.5	1.0	1,000	22.50
PRIMETEX	39.4	-2.0%	47.9	12.2x	0.6x	ROBI	17,966	17,966	17,966	15,442	15,197	15,104	14,576	14,347	BDCOM	38.5	35.6	3.0	345	13.17
BNICL	64.7	-2.0%	19.4	19.4x	2.8x	BSRMLTD	15,442	15,442	15,442	15,442	15,197	15,104	14,576	14,347	MARICO	2,408.9	2,408.9	2.0	5	13.07
SAIHAMTEX	24.9	-2.0%	49.5	14.8x	0.6x	OLYMPIC	15,197	15,197	15,197	15,197	15,197	15,104	14,576	14,347	PRIMEINSUR	100.0	97.8	6.0	111	10.88
ICBIBANK	5.0	-2.0%	6.4	NM	NM	ALARABANK	15,104	15,104	15,104	15,104	15,104	15,104	14,576	14,347	INTRACO	31.1	30.4	2.0	280	8.64
REGENTTEX	10.0	-2.0%	7.0	NM	0.4x	SUMITPOWER	14,576	14,576	14,576	14,576	14,576	14,576	14,576	14,347	SEAPEARL	46.0	45.7	2.0	130	5.95
FASFIN	5.0	-2.0%	2.2	NM	NM	UPGDCL	14,347	14,347	14,347	14,347	14,347	14,347	14,347	14,347	ACFL	29.3	29.3	1.0	203	5.95
INDEXAGRO	110.2	-2.0%	15.2	19.4x	1.8x										DOREENPWR	75.6	75.6	1.0	75	5.67

*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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
IPDC	63.3	62.0	182.2	2,909	11
FORTUNE	98.5	87.9	91.2	937	3
CITYBANK	22.5	22.5	22.5	1,000	1
BDCOM	38.5	35.6	13.2	345	3
MARICO	2,408.9	2,408.9	13.1	5	2
PRIMEINSUR	100.0	97.8	10.9	111	6
INTRACO	31.1	30.4	8.6	280	2
SEAPEARL	46.0	45.7	6.0	130	2
ACFL	29.3	29.3	5.9	203	1
DOREENPWR	75.6	75.6	5.7	75	1
AL-HAJTEX	134.2	132.0	5.1	38	2
PRIMETEX	42.5	42.5	4.7	110	1
JHRML	87.0	87.0	4.4	50	2
BSCCL	220.4	220.4	4.1	19	2
MPETROLEUM	202.8	202.8	3.8	19	2
SALVOCHEM	69.0	67.0	2.6	38	4
IMAMBUTTON	148.0	148.0	2.2	15	1
BEXIMCO	139.9	139.9	2.1	15	1
HRTEX	101.1	101.1	1.5	15	1
ROBI	34.3	34.3	1.4	40	1
BRACBANK	41.0	41.0	1.2	30	1
BPML	57.9	57.8	1.1	19	2
Total			397.6		58

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Union Insurance Company Limited	-	0.0%	5.0%	Record Date	20-Jul-22
Express Insurance Limited	-	0.0%	10.0%	Record Date	21-Jul-22
Purabi Gen. Insurance Company Ltd.	-	0.0%	10.0%	Record Date	25-Jul-22
Bangladesh Industrial Fin. Co. Ltd.	-	0.0%	0.0%	Record Date	25-Jul-22
National Life Insurance Company Ltd.	-	0.0%	35.0%	Record Date	28-Jul-22
Rupali Life Insurance Company Limited	-	0.0%	18.0%	Record Date	17-Aug-22
Kay & Que (Bangladesh) Ltd.	-	0.0%	5.0%	Record Date	Notify later

Important DSE News
PAPERPROC

Magura Group Ltd., one of the Corporate Directors of the Company, has further informed that it has completed its sale of 3,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 03.07.2022.

MONOSPOOL

Pearl Paper and Board Mills Ltd., one of the Sponsors of the Company, has further informed that it has completed its sale of 63,526 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 03.07.2022.

NCCBANK

Mr. Nisar Kader, one of the Sponsors of the Company, has further informed that he has completed his sale of 81,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 21.06.2022.

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