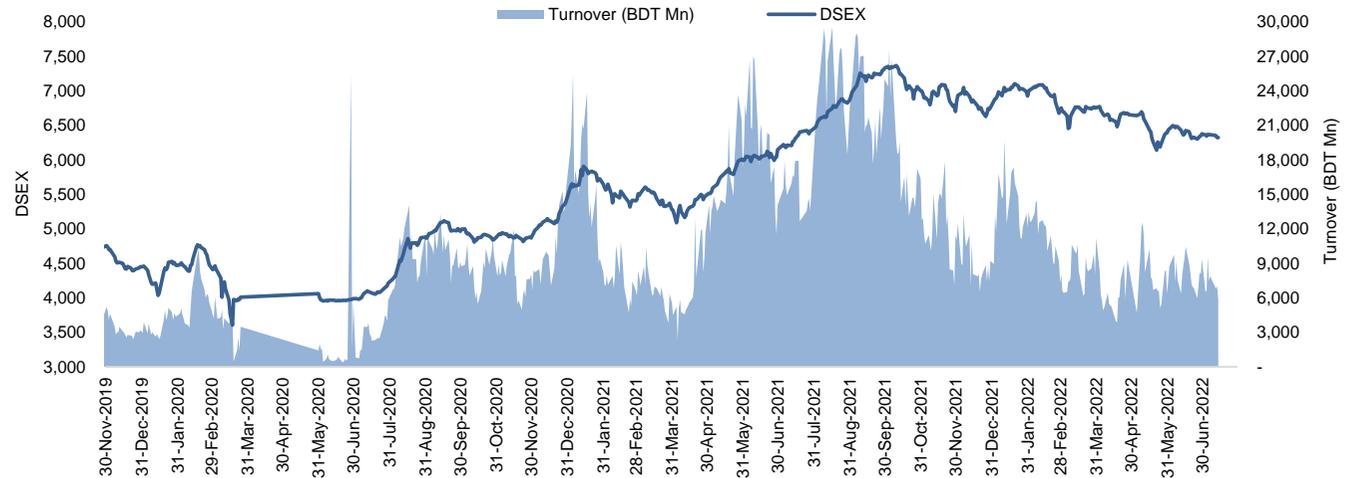


**Daily Market Update**

The market closed in red today. The benchmark index DSEX (0.00%) lost 0.3 points and closed at 6,324.50. The blue-chip index DS30 (+0.04%), the Shariah-based index DSES (-0.03%), and the large-cap index CDSET (+0.03%) closed at 2,273.85, 1,377.35, and 1,249.26 points, respectively. Most of the large-cap sectors posted negative performance today. Fuel & Power gained 0.96%, while Food & Allied increased 0.12%. Telecommunication experienced the highest loss of 0.27%, followed by NBFI (-0.18%), Pharmaceutical (-0.14%), Bank (-0.11%), and Engineering (-0.07%), respectively. Block trades contributed 0.9% of the overall market turnover. Titas Gas Transmission & Dist. Co. Ltd. (+3.8%) was the most traded share with a turnover of BDT 472 million.



| Index | Closing  | Opening  | Point Δ | %Δ     | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX  | 6,324.50 | 6,324.81 | -0.30   | -0.00% | -6.4%  |
| DS30  | 2,273.85 | 2,272.96 | +0.89   | +0.04% | -10.2% |
| DSES  | 1,377.35 | 1,377.72 | -0.37   | -0.03% | -3.8%  |
| CDSET | 1,249.26 | 1,248.91 | +0.35   | +0.03% | -8.1%  |

|                     | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category        | 130      | 197      | 55        | 382   |
| A Category (Equity) | 94       | 129      | 41        | 264   |
| B Category (Equity) | 28       | 52       | 9         | 89    |
| N Category (Equity) | 0        | 5        | 1         | 6     |
| Z Category (Equity) | 8        | 11       | 4         | 23    |
| Mutual Funds        | 1        | 15       | 19        | 35    |
| Corporate Bonds     | 1        | 2        | 0         | 3     |

|              |           | Today     | Last Day  | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap         | Mn BDT    | 5,159,604 | 5,161,022 |          |
|              | Mn USD    | 55,114    | 55,129    | -0.0%    |
| Turnover     | Mn BDT    | 5,806     | 7,023     | -17.3%   |
|              | Mn USD    | 62        | 75        |          |
| Volume       | Mn Shares | 144       | 182       | -21.0%   |
| No. of Trade |           | 144,334   | 139,892   | +3.2%    |

\* Exchange Rate is BDT 93.62 as of Jul 14, 2022

Figure: Sectorial Turnover (BDT)

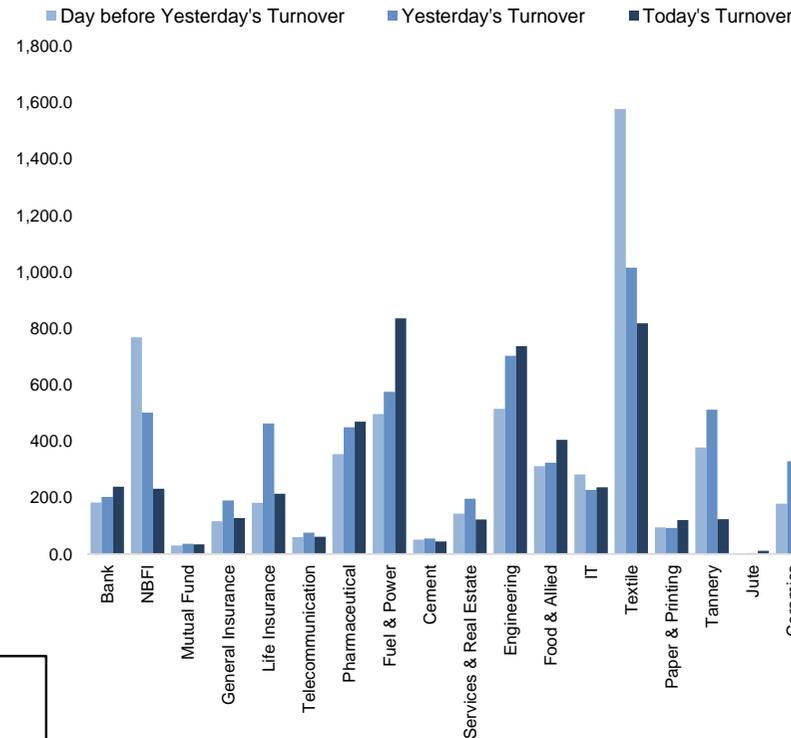
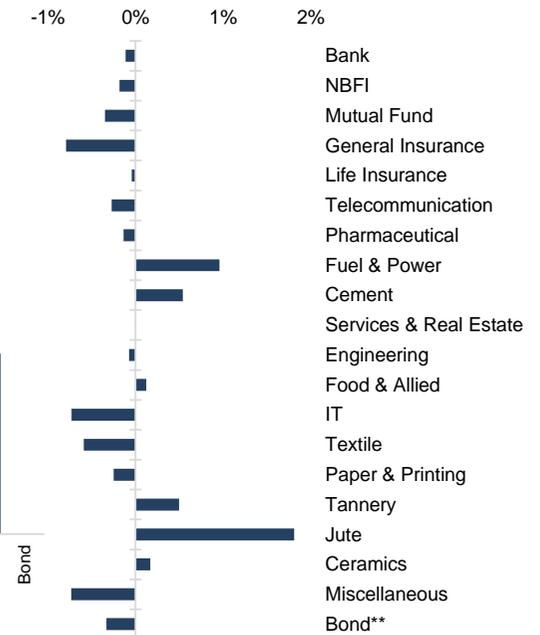


Figure: Sectorial Mcap Change



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                   | 1,441   | 1,442   | -1.62    | -0.11% | 33               | 664,493       | 14.6%           | 238.5             | 4.2%                | 7.9x  | 0.8x  | GP                    | 389,832       | 8.6%            | 42.8              | 11.7x | 6.7x  |
| NBFI                   | 2,012   | 2,015   | -3.69    | -0.18% | 23               | 198,130       | 4.4%            | 231.7             | 4.1%                | NM    | 3.6x  | WALTONHIL             | 326,678       | 7.2%            | 1.8               | 22.8x | 3.4x  |
| Mutual Fund            | 881     | 884     | -3.09    | -0.35% | 36               | 38,805        | 0.9%            | 34.7              | 0.6%                | NM    | 0.8x  | BATBC                 | 290,736       | 6.4%            | 43.9              | 19.0x | 8.8x  |
| General Insurance      | 3,271   | 3,297   | -26.09   | -0.79% | 41               | 96,678        | 2.1%            | 127.4             | 2.3%                | 15.4x | 1.6x  | SQURPHARMA            | 190,321       | 4.2%            | 28.9              | 10.3x | 1.9x  |
| Life Insurance         | 2,342   | 2,343   | -0.98    | -0.04% | 13               | 67,489        | 1.5%            | 214.4             | 3.8%                | NM    | NM    | ROBI                  | 176,518       | 3.9%            | 4.3               | 96.3x | 2.6x  |
| Telecommunication      | 5,121   | 5,135   | -13.99   | -0.27% | 3                | 602,975       | 13.3%           | 61.7              | 1.1%                | 16.1x | 4.4x  | UPGDCL                | 143,648       | 3.2%            | 3.1               | 11.6x | 4.4x  |
| Pharmaceutical         | 3,735   | 3,741   | -5.07    | -0.14% | 32               | 701,500       | 15.4%           | 469.1             | 8.3%                | 17.3x | 2.5x  | RENATA                | 142,299       | 3.1%            | 10.1              | 25.7x | 5.0x  |
| Fuel & Power           | 1,837   | 1,819   | +17.43   | +0.96% | 23               | 479,459       | 10.5%           | 835.5             | 14.9%               | 12.0x | 1.2x  | BEXIMCO               | 112,169       | 2.5%            | 306.6             | 7.8x  | 1.5x  |
| Cement                 | 2,444   | 2,430   | +13.17   | +0.54% | 7                | 117,763       | 2.6%            | 45.1              | 0.8%                | 25.0x | 2.6x  | BERGERPBL             | 80,934        | 1.8%            | 0.8               | 27.8x | 7.7x  |
| Services & Real Estate | 1,422   | 1,422   | -0.02    | -0.00% | 8                | 53,757        | 1.2%            | 122.2             | 2.2%                | 74.8x | 1.0x  | ICB                   | 79,776        | 1.8%            | 4.3               | 45.2x | 1.8x  |
| Engineering            | 4,678   | 4,681   | -3.42    | -0.07% | 42               | 547,733       | 12.0%           | 736.9             | 13.1%               | 19.0x | 1.9x  | LHBL                  | 79,554        | 1.8%            | 29.4              | 21.0x | 4.5x  |
| Food & Allied          | 21,955  | 21,928  | +27.04   | +0.12% | 21               | 389,874       | 8.6%            | 404.8             | 7.2%                | 23.8x | 9.1x  | MARICO                | 75,584        | 1.7%            | 2.7               | 21.3x | 28.1x |
| IT                     | 2,634   | 2,654   | -19.39   | -0.73% | 11               | 33,752        | 0.7%            | 237.2             | 4.2%                | 27.4x | 2.4x  | BXPBARMA              | 66,069        | 1.5%            | 36.9              | 11.5x | 1.7x  |
| Textile                | 1,620   | 1,629   | -9.65    | -0.59% | 58               | 174,721       | 3.8%            | 817.9             | 14.5%               | 26.2x | 1.1x  | BEACONPHAR            | 59,113        | 1.3%            | 10.8              | 63.2x | 10.1x |
| Paper & Printing       | 7,845   | 7,865   | -19.50   | -0.25% | 6                | 28,717        | 0.6%            | 120.9             | 2.1%                | NM    | 2.0x  | BRACBANK              | 58,217        | 1.3%            | 37.3              | 11.0x | 1.1x  |
| Tannery                | 3,169   | 3,153   | +15.73   | +0.50% | 6                | 33,840        | 0.7%            | 123.5             | 2.2%                | 47.8x | 3.3x  | ISLAMIBANK            | 52,647        | 1.2%            | 3.6               | 10.7x | 0.8x  |
| Jute                   | 8,844   | 8,686   | +157.46  | +1.81% | 3                | 2,038         | 0.0%            | 11.6              | 0.2%                | NM    | 28.8x | TITASGAS              | 46,197        | 1.0%            | 472.3             | 13.8x | 0.6x  |
| Ceramics               | 780     | 779     | +1.33    | +0.17% | 5                | 34,781        | 0.8%            | 149.5             | 2.7%                | 32.6x | 2.1x  | DUTCHBANGL            | 44,876        | 1.0%            | 3.3               | 7.8x  | 1.2x  |
| Miscellaneous          | 4,367   | 4,399   | -32.21   | -0.73% | 15               | 242,150       | 5.3%            | 639.3             | 11.4%               | 11.9x | 2.0x  | POWERGRID             | 41,623        | 0.9%            | 97.8              | 11.4x | 0.4x  |
| Bond**                 | 90      | 90      | -0.30    | -0.33% | 9                | 37,233        | 0.8%            | 2.0               | 0.0%                | NM    | NM    | SUMITPOWER            | 39,725        | 0.9%            | 7.9               | 9.5x  | 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      | 35.3              | +10.0% | 16.4              | NM    | NM    | SQURPHARMA                 | 124,527                  | 7.3%                       | 10.3x | 1.9x  | TITASGAS          | 46.7              | +3.8% | 472.3             | 13.8x | 0.6x |
| BDAUTOCA        | 153.9             | +8.5%  | 26.1              | NM    | 21.9x | BATBC                      | 76,900                   | 4.5%                       | 19.0x | 8.8x  | BEXIMCO           | 128.0             | -0.5% | 306.6             | 7.8x  | 1.5x |
| USMANIAGL       | 82.0              | +8.0%  | 26.0              | 76.6x | 1.0x  | BEXIMCO                    | 74,761                   | 4.4%                       | 7.8x  | 1.5x  | KDSALTD           | 64.8              | +4.7% | 139.8             | 28.1x | 2.6x |
| GEMINISEA       | 357.2             | +7.7%  | 40.5              | 19.7x | 62.0x | RENATA                     | 69,342                   | 4.1%                       | 25.7x | 5.0x  | IPDC              | 63.6              | -0.5% | 136.8             | 26.3x | 3.6x |
| ISNLTD          | 63.0              | +7.0%  | 56.7              | NM    | 21.7x | BXPBARMA                   | 46,130                   | 2.7%                       | 11.5x | 1.7x  | JHRML             | 79.2              | -0.4% | 101.3             | 26.7x | 2.6x |
| MIRACLEIND      | 35.0              | +6.7%  | 70.2              | NM    | 1.1x  | BEACONPHAR                 | 41,379                   | 2.4%                       | 63.2x | 10.1x | POWERGRID         | 58.4              | +2.6% | 97.8              | 11.4x | 0.4x |
| ATLASBANG       | 115.5             | +6.6%  | 7.5               | NM    | 0.9x  | GP                         | 38,983                   | 2.3%                       | 11.7x | 6.7x  | FUWANGFOOC        | 25.5              | -1.2% | 89.1              | NM    | 2.2x |
| EASTRNLU        | 1,998.5           | +6.2%  | 29.5              | NM    | 13.1x | BRACBANK                   | 31,298                   | 1.8%                       | 11.0x | 1.1x  | SUNLIFEINS        | 54.9              | +5.6% | 87.9              | NM    | NM   |
| SUNLIFEINS      | 54.9              | +5.6%  | 87.9              | NM    | NM    | LHBL                       | 28,099                   | 1.6%                       | 21.0x | 4.5x  | FORTUNE           | 88.3              | +0.5% | 86.0              | 28.5x | 5.8x |
| DESCO           | 40.0              | +5.3%  | 21.8              | 20.0x | 0.6x  | ISLAMIBANK                 | 25,628                   | 1.5%                       | 10.7x | 0.8x  | MATINSPIINN       | 72.3              | +4.9% | 85.8              | 7.0x  | 1.3x |

| Top Ten Losers | Close Price (BDT) | Δ%    | Turnover (BDT Mn) | PE    | PB   | NBL <th>24,575 <th>1.4% <th>7.4x <th>1.1x</th> <th>Block Trade</th> <th>Maximum Price (BDT)</th> <th>Minimum Price (BDT)</th> <th>No. of Trade</th> <th>Quantity ('000)</th> <th>Turnover (BDT Mn)</th> </th></th></th> | 24,575 <th>1.4% <th>7.4x <th>1.1x</th> <th>Block Trade</th> <th>Maximum Price (BDT)</th> <th>Minimum Price (BDT)</th> <th>No. of Trade</th> <th>Quantity ('000)</th> <th>Turnover (BDT Mn)</th> </th></th> | 1.4% <th>7.4x <th>1.1x</th> <th>Block Trade</th> <th>Maximum Price (BDT)</th> <th>Minimum Price (BDT)</th> <th>No. of Trade</th> <th>Quantity ('000)</th> <th>Turnover (BDT Mn)</th> </th> | 7.4x <th>1.1x</th> <th>Block Trade</th> <th>Maximum Price (BDT)</th> <th>Minimum Price (BDT)</th> <th>No. of Trade</th> <th>Quantity ('000)</th> <th>Turnover (BDT Mn)</th> | 1.1x | Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|----------------|-------------------|-------|-------------------|-------|------|---|--|--|---|------|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| NRBCBANK       | 19.4              | -5.4% | 19.8              | 5.5x  | 1.1x | NBL   | 18,652   | 1.1%   | NM  | 0.5x | FORTUNE     | 95.8                | 92.2                | 3.0          | 707             | 65.55             |
| REGENTTEX      | 9.8               | -2.0% | 5.0               | NM    | 0.4x | CITYBANK  | 18,261   | 1.1%   | 5.1x  | 0.8x | JHRML       | 87.2                | 87.0                | 3.0          | 290             | 25.26             |
| DGIC           | 29.5              | -2.0% | 2.1               | 21.9x | 2.4x | PUBALIBANK  | 18,173   | 1.1%   | 5.8x  | 0.6x | BSRMLTD     | 105.8               | 105.8               | 1.0          | 175             | 18.52             |
| ETL            | 9.9               | -2.0% | 1.6               | NM    | 0.8x | ROBI  | 17,652   | 1.0%   | 96.3x   | 2.6x | INTRACO     | 31.5                | 29.8                | 3.0          | 500             | 15.24             |
| INTRACO        | 29.8              | -2.0% | 13.3              | 28.5x | 2.5x | OLYMPIC   | 15,422   | 0.9%   | 16.8x   | 2.7x | AL-HAJTEX   | 127.6               | 126.9               | 12.0         | 111             | 14.10             |
| SHYAMPSUG      | 114.3             | -2.0% | 4.1               | NM    | NM   | BSRMLTD   | 15,378   | 0.9%   | 5.3x  | 0.7x | ACFL        | 30.0                | 30.0                | 3.0          | 318             | 9.54              |
| FIRSTFIN       | 5.0               | -2.0% | 0.4               | NM    | NM   | ALARABANK   | 15,166   | 0.9%   | 11.2x   | 1.1x | SUNLIFEINS  | 53.0                | 51.0                | 4.0          | 110             | 5.73              |
| YPL            | 20.1              | -2.0% | 2.9               | NM    | 1.8x | SUMITPOWER  | 14,615   | 0.9%   | 9.5x  | 1.1x | TITASGAS    | 45.5                | 45.5                | 2.0          | 80              | 3.64              |
| METROSPIN      | 25.2              | -1.9% | 14.2              | 17.8x | 1.2x | UPGDCL  | 14,365   | 0.8%   | 11.6x   | 4.4x | MONNOFABR   | 28.5                | 28.5                | 4.0          | 109             | 3.09              |
| KTL            | 25.2              | -1.9% | 46.5              | 51.3x | 1.5x |   |  |  |   |      | LINDEBD     | 1,430.0             | 1,430.0             | 1.0          | 2               | 2.86              |

\*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 |
|--------------|---------------------|---------------------|-------------------|-----------------|--------------|
| FORTUNE      | 95.8                | 92.2                | 65.6              | 707             | 3            |
| JHRML        | 87.2                | 87.0                | 25.3              | 290             | 3            |
| BSRMLTD      | 105.8               | 105.8               | 18.5              | 175             | 1            |
| INTRACO      | 31.5                | 29.8                | 15.2              | 500             | 3            |
| AL-HAJTEX    | 127.6               | 126.9               | 14.1              | 111             | 12           |
| ACFL         | 30.0                | 30.0                | 9.5               | 318             | 3            |
| SUNLIFEINS   | 53.0                | 51.0                | 5.7               | 110             | 4            |
| TITASGAS     | 45.5                | 45.5                | 3.6               | 80              | 2            |
| MONNOFABR    | 28.5                | 28.5                | 3.1               | 109             | 4            |
| LINDEBD      | 1,430.0             | 1,430.0             | 2.9               | 2               | 1            |
| NEWLINE      | 46.9                | 46.9                | 2.3               | 50              | 1            |
| IPDC         | 70.2                | 70.2                | 2.3               | 33              | 1            |
| PADMALIFE    | 50.0                | 50.0                | 2.3               | 45              | 2            |
| AIL          | 56.0                | 51.0                | 2.2               | 40              | 3            |
| SALVOCHEM    | 69.9                | 68.4                | 1.6               | 22              | 2            |
| FIRSTSBANK   | 10.9                | 10.9                | 1.4               | 131             | 1            |
| VFSTDL       | 25.7                | 25.7                | 1.3               | 49              | 1            |
| LRBDL        | 42.8                | 42.8                | 1.3               | 29              | 1            |
| IFIC         | 12.3                | 12.3                | 1.0               | 85              | 1            |
| NRBCBANK     | 20.9                | 20.9                | 0.9               | 45              | 1            |
| PRIMEINSUR   | 97.0                | 97.0                | 0.9               | 9               | 1            |
| GSPFINANCE   | 33.2                | 33.2                | 0.7               | 21              | 1            |
| <b>Total</b> |                     |                     | <b>182.7</b>      |                 | <b>54</b>    |

**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**
**ACI**

The Company has informed that the Board of Directors of the Company has approved the Termination of Joint Venture Agreement dated 5 July 2003 with Dabur International Limited formerly known as Redrock Limited whereby Advanced Chemical Industries Limited will sell its entire shareholding i.e. 24% in the share capital of Asian Consumer Care Limited i.e. 8,480,187 fully paid up ordinary shares of Tk 10 (Ten) each at a consideration of BDT 600,000,000.00 (six hundred million) only, for alignment of the future expansion of the Company (Advanced Chemical Industries Limited).

The Company has informed that the Board of Directors of the Company has approved the draft Scheme of Arrangement for Demerger and Merger ("Scheme") providing for the demerger of plastics business undertaking from Premiaflex Plastics Limited (PPL) into ACI Premio Plastics Limited (a subsidiary of PPL) and subject to fulfilment of merger of the remaining business undertaking including packaging business of PPL with Advanced Chemical Industries Limited under the provision of Section 228 & 229 of the Companies Act 1994 subject to the consent of Shareholders and Creditors of the respective companies and approval from the Honorable High Court Division of Supreme Court of Bangladesh to create distinct brand identity for ACI Premio Plastics Limited for the consumer and to connect the backward linkage operation of Premiaflex Plastics Limited to the Company.

**MERCANBANK**

Mrs. Bilkis Begum, one of the Sponsors of the Company, has expressed her intention to sell 5,00,000 shares out of her holding 15,91,982 shares of the Company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days.

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