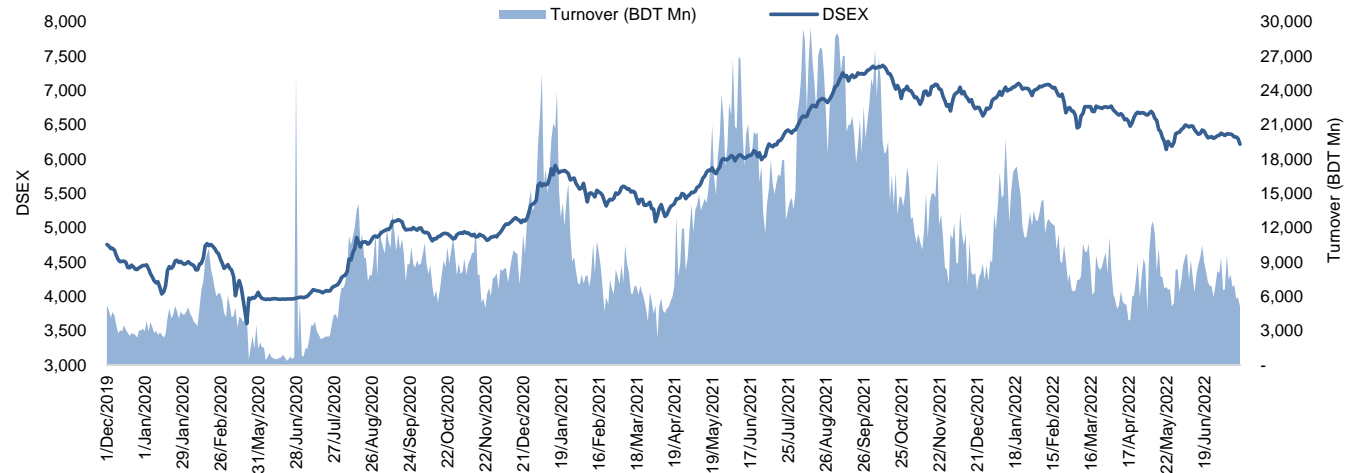


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.39%) lost 87.4 points and closed at 6,216.89. The blue-chip index DS30 (-1.40%), the Shariah-based index DSES (-1.21%), and the large-cap index CDSET (-1.30%) closed at 2,235.83, 1,359.63, and 1,229.19 points, respectively. All the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 1.71% followed by Food & Allied (-1.71%), NBFi (-1.66%), Engineering (-1.20%), Pharmaceutical (-1.00%), Bank (-0.88%), and Telecommunication (-0.71%), respectively. Block trades contributed 1.5% of the overall market turnover. Delta Life Insurance Company Ltd. (-2.0%) was the most traded share with a turnover of BDT 357 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,216.89	6,304.29	-87.40	-1.39%	-8.0%
DS30	2,235.83	2,267.56	-31.73	-1.40%	-11.7%
DSES	1,359.63	1,376.24	-16.61	-1.21%	-5.0%
CDSET	1,229.19	1,245.44	-16.25	-1.30%	-9.6%

	Advanced	Declined	Unchanged	Total
All Category	12	358	12	382
A Category (Equity)	7	249	8	264
B Category (Equity)	1	85	3	89
N Category (Equity)	0	6	0	6
Z Category (Equity)	4	18	1	23
Mutual Funds	0	29	6	35
Corporate Bonds	1	2	0	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,090,131	5,148,237	-1.1%
	Mn USD	54,179	54,798	
Turnover	Mn BDT	5,153	5,935	-13.2%
	Mn USD	55	63	
Volume	Mn Shares	134	161	-16.6%
No. of Trade		115,352	149,625	-22.9%

* Exchange Rate is BDT 93.95 as of Jul 18, 2022

Figure: Sectorial Turnover (BDT)

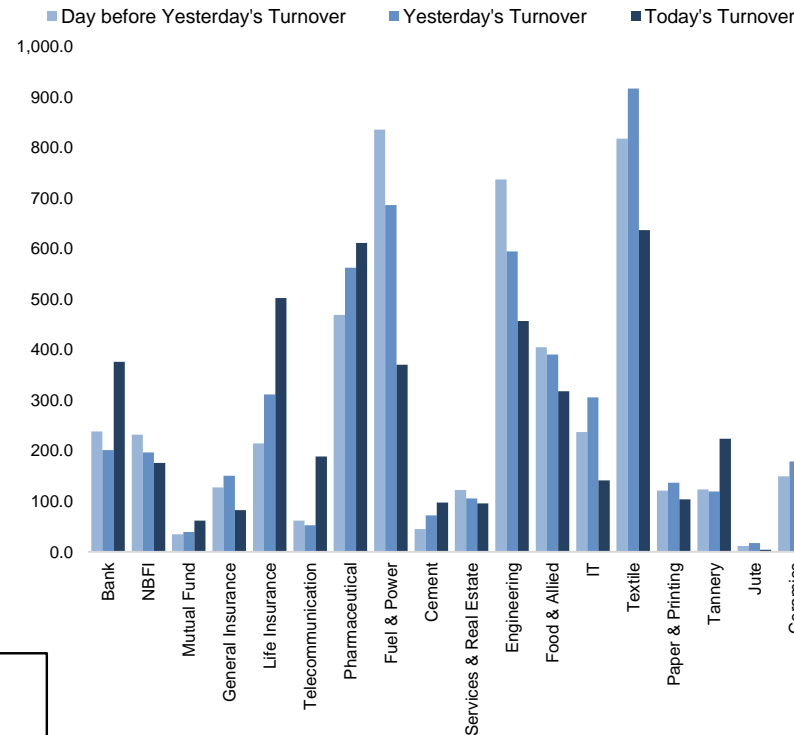
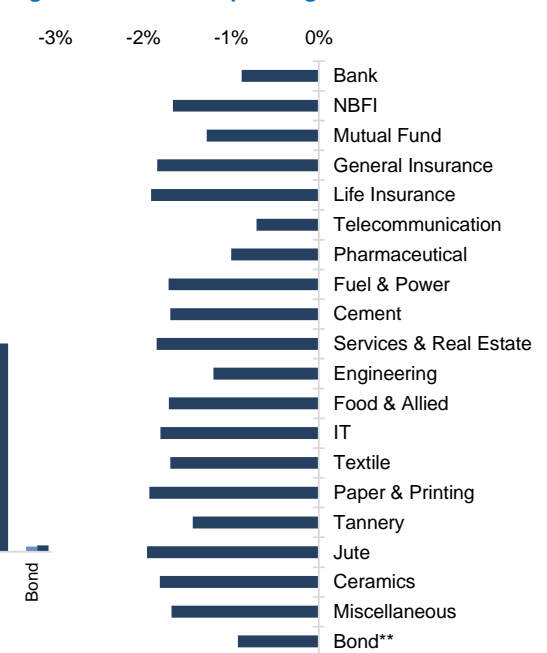


Figure: Sectorial Mcap Change



Market PE 15.5x
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	1,423	1,436	-12.60	-0.88%	33	656,522	14.7%	375.9	7.5%	7.8x	0.8x	GP	390,912	8.7%	140.6	11.5x	7.8x
NBFI	1,964	1,997	-33.16	-1.66%	23	193,407	4.3%	175.9	3.5%	NM	3.6x	WALTONHIL	324,315	7.3%	3.7	22.7x	3.3x
Mutual Fund	865	876	-11.17	-1.28%	36	38,110	0.9%	61.6	1.2%	NM	0.8x	BATBC	285,390	6.4%	79.4	18.7x	8.7x
General Insurance	3,178	3,237	-59.59	-1.84%	41	93,923	2.1%	82.6	1.7%	14.9x	1.5x	SQURPHARMA	188,991	4.2%	61.3	10.2x	1.9x
Life Insurance	2,314	2,359	-45.11	-1.91%	13	66,693	1.5%	502.3	10.0%	NM	NM	ROBI	170,233	3.8%	2.8	92.9x	2.6x
Telecommunication	5,072	5,109	-36.30	-0.71%	3	597,226	13.3%	188.5	3.8%	15.6x	4.7x	RENATA	141,623	3.2%	6.0	25.6x	5.0x
Pharmaceutical	3,705	3,743	-37.38	-1.00%	32	695,820	15.5%	611.0	12.2%	17.1x	2.5x	UPGDCL	141,156	3.2%	22.0	11.4x	4.3x
Fuel & Power	1,798	1,829	-31.30	-1.71%	23	469,227	10.5%	370.2	7.4%	11.7x	1.2x	BEXIMCO	108,225	2.4%	266.5	7.5x	1.4x
Cement	2,391	2,432	-41.13	-1.69%	7	115,222	2.6%	97.3	1.9%	24.4x	2.5x	BERGERPBL	80,224	1.8%	1.6	27.6x	7.6x
Services & Real Estate	1,378	1,404	-25.93	-1.85%	8	52,114	1.2%	95.8	1.9%	72.5x	1.0x	ICB	78,164	1.7%	2.6	44.2x	1.7x
Engineering	4,617	4,673	-56.08	-1.20%	42	540,572	12.1%	457.0	9.1%	18.7x	1.9x	LHBL	77,696	1.7%	40.5	20.5x	4.4x
Food & Allied	21,588	21,963	-374.74	-1.71%	21	383,355	8.6%	317.9	6.4%	23.4x	9.0x	MARICO	75,200	1.7%	3.2	21.2x	28.0x
IT	2,579	2,626	-47.34	-1.80%	11	33,037	0.7%	141.3	2.8%	26.8x	2.3x	BXPBARMA	64,820	1.4%	31.4	11.3x	1.6x
Textile	1,584	1,611	-27.27	-1.69%	58	170,866	3.8%	636.8	12.7%	25.7x	1.1x	BEACONPHAR	58,443	1.3%	8.1	62.5x	10.0x
Paper & Printing	7,721	7,873	-152.05	-1.93%	6	28,262	0.6%	103.7	2.1%	NM	1.9x	BRACBANK	56,870	1.3%	19.4	10.7x	1.0x
Tannery	3,124	3,169	-45.49	-1.44%	6	33,362	0.7%	223.6	4.5%	47.1x	3.3x	ISLAMIBANK	52,647	1.2%	5.0	10.7x	0.8x
Jute	8,859	9,036	-176.89	-1.96%	3	2,041	0.0%	4.3	0.1%	NM	28.8x	DUTCHBANGL	44,806	1.0%	5.2	7.8x	1.2x
Ceramics	757	771	-13.96	-1.81%	5	33,747	0.8%	128.3	2.6%	31.6x	2.0x	TITASGAS	44,416	1.0%	112.5	13.3x	0.6x
Miscellaneous	4,261	4,334	-72.72	-1.68%	15	236,297	5.3%	412.5	8.3%	11.6x	2.0x	POWERGRID	40,127	0.9%	31.7	10.9x	0.4x
Bond**	89	90	-0.83	-0.92%	9	36,851	0.8%	13.0	0.3%	NM	NM	SUMITPOWER	38,978	0.9%	14.1	9.3x	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
ICBIBANK	6.0	+9.1%	15.6	NM	NM	SQURPHARMA	123,657	7.4%	10.2x	1.9x	DELTALIFE	150.2	-2.0%	356.7	NM	NM
BIFC	7.3	+9.0%	8.1	NM	NM	BATBC	75,486	4.5%	18.7x	8.7x	BEXIMCO	123.5	-2.0%	266.5	7.5x	1.4x
MITHUNKNIT	18.3	+4.0%	23.4	NM	5.8x	BEXIMCO	72,132	4.3%	7.5x	1.4x	FORTUNE	84.9	-2.0%	193.5	27.4x	5.6x
SAVAREFR	246.2	+2.7%	3.3	NM	3517.1x	RENATA	69,013	4.1%	25.6x	5.0x	GP	289.5	-0.1%	140.6	11.5x	7.8x
ORIONINFU	100.2	+2.1%	138.8	59.5x	7.4x	BXPBARMA	45,257	2.7%	11.3x	1.6x	ORIONINFU	100.2	+2.1%	138.8	59.5x	7.4x
LIBRAINFU	1,002.0	+1.7%	30.8	NM	0.8x	BEACONPHAR	40,910	2.4%	62.5x	10.0x	KDSALTD	64.7	+0.2%	117.1	28.0x	2.6x
BANKASIA	20.7	+1.0%	4.6	8.8x	0.9x	GP	39,091	2.3%	11.5x	7.8x	TITASGAS	44.9	-2.0%	112.5	13.3x	0.6x
STANCERAM	161.6	+0.7%	21.7	NM	21.8x	BRACBANK	30,573	1.8%	10.7x	1.0x	BATBC	528.5	-1.8%	79.4	18.7x	8.7x
HRTEX	101.6	+0.7%	74.6	32.2x	2.4x	LHBL	27,442	1.6%	20.5x	4.4x	ORIONPHARM	84.0	-0.7%	78.0	20.5x	1.0x
TRUSTBANK	33.5	+0.6%	0.8	8.1x	1.2x	ISLAMIBANK	25,628	1.5%	10.7x	0.8x	HRTEX	101.6	+0.7%	74.6	32.2x	2.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	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)
SONARGAON	49.0	-2.0%	9.5	NM	4.3x	PUBALIBANK	17,962	1.1%	5.7x	0.6x	IPDC	64.0	61.2	5.0	440	27.06
MEGHNAINS	49.0	-2.0%	0.7	67.7x	3.4x	CITYBANK	17,857	1.1%	5.0x	0.8x	PRIMEINSUR	93.6	93.5	6.0	274	25.64
SALVOCHEM	63.7	-2.0%	32.7	26.5x	4.2x	ROBI	17,023	1.0%	92.9x	2.6x	FORTUNE	88.9	84.9	8.0	262	22.39
QUEENSOUTH	24.5	-2.0%	19.1	13.6x	1.6x	OLYMPIC	15,422	0.9%	16.8x	2.7x	HRTEX	99.0	99.0	3.0	119	11.78
REGENTTEX	9.8	-2.0%	5.2	NM	0.4x	BSRMLTD	14,994	0.9%	5.2x	0.7x	GSPFINANCE	34.0	32.1	2.0	227	7.37
KAY&QUE	245.1	-2.0%	1.6	NM	3.2x	ALARABANK	14,980	0.9%	11.1x	1.1x	OLYMPIC	123.3	123.3	2.0	50	6.17
RAHIMAFODD	260.1	-2.0%	12.2	NM	28.3x	SUMITPOWER	14,340	0.9%	9.3x	1.1x	TITASGAS	46.6	44.9	2.0	120	5.57
BDLAMPS	270.0	-2.0%	36.2	34.2x	2.9x	UPGDCL	14,116	0.8%	11.4x	4.3x	BSC	120.0	110.8	4.0	39	4.40
AIL	49.1	-2.0%	6.5	31.9x	2.3x						SONARGAON	49.5	49.5	2.0	55	2.72
EASTRNLUB	2,038.3	-2.0%	9.1	NM	13.4x						PADMALIFE	50.0	50.0	3.0	50	2.50

*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	64.0	61.2	27.1	440	5
PRIMEINSUR	93.6	93.5	25.6	274	6
FORTUNE	88.9	84.9	22.4	262	8
HRTEX	99.0	99.0	11.8	119	3
GSPFINANCE	34.0	32.1	7.4	227	2
OLYMPIC	123.3	123.3	6.2	50	2
TITASGAS	46.6	44.9	5.6	120	2
BSC	120.0	110.8	4.4	39	4
SONARGAON	49.5	49.5	2.7	55	2
PADMALIFE	50.0	50.0	2.5	50	3
SPCERAMICS	51.8	46.2	2.4	49	4
INTRACO	31.0	31.0	2.2	70	1
SKICL	53.9	53.9	2.2	40	1
ACTIVEFINE	21.0	21.0	2.1	100	1
NEWLIN	47.4	47.4	1.9	40	1
BDCOM	36.8	33.4	1.8	51	2
ACIFORMULA	162.1	162.1	1.7	11	1
SONALILIFE	58.2	57.0	1.7	30	2
PTL	83.0	83.0	1.6	20	1
AAMRANET	40.2	40.2	1.6	40	1
AAMRATECH	32.1	32.1	1.5	47	1
YPL	19.4	19.4	1.4	74	2
Total			153.3		75

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
Grameenphone Ltd.	-	0.0%	125.0%	Record Date	10-Aug-22
Rupali Life Insurance Company Limited	-	0.0%	18.0%	Record Date	17-Aug-22

Important DSE News
GP

The Board of Directors has recommended interim cash dividend for the year 2022 at the rate of 125% of the paid up capital of the Company which represents 97.5% of the Profit after tax for the six months ended June 30, 2022 (BDT 12.50 per share of BDT 10.00 each), out of the audited net profits of the Company for the 6 months ended June 30, 2022. Record date: 10.08.2022.

(Q2 Audited): EPS was Tk. 6.82 for April-June 2022 as against Tk. 6.30 for April-June 2021; EPS was Tk. 12.82 for January-June 2022 as against Tk. 12.89 for January-June 2021. NOCFPS was Tk. 23.61 for January-June 2022 as against Tk. 21.88 for January-June 2021. NAV per share was Tk. 37.25 as on June 30, 2022 and Tk. 36.94 as on December 31, 2021.

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