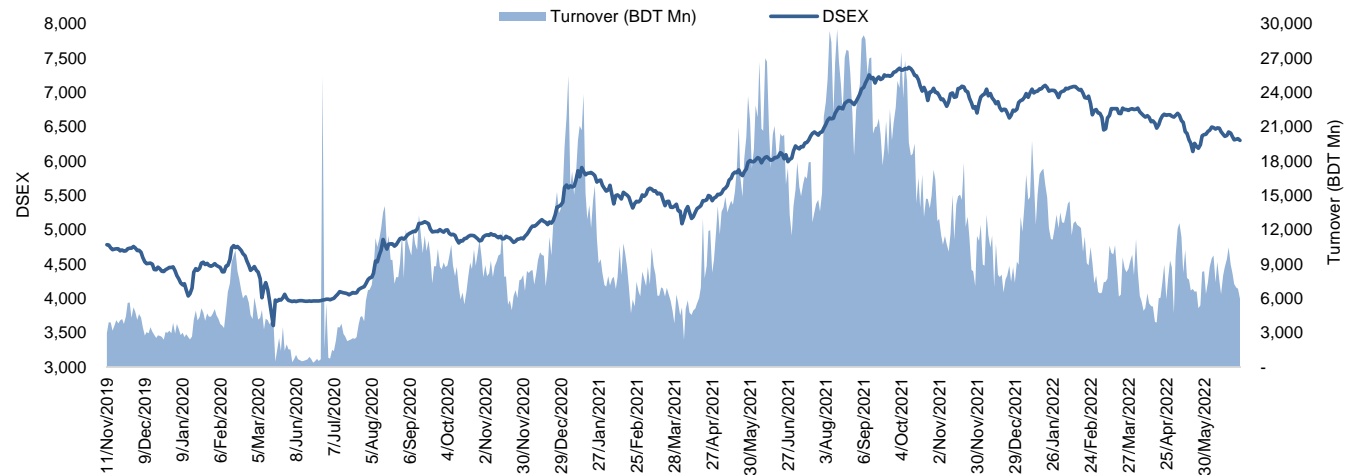


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.42%) lost 26.56 points and closed at 6,301.09. The blue-chip index DS30 (-0.52%), the Shariah-based index DSES (-0.29%), and the large-cap index CDSET (-0.41%) closed at 2,286.60, 1,378.87, and 1,256.54 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 0.29% followed by Food & Allied (+0.24%), Engineering (+0.18%). Fuel & Power experienced the highest loss of 0.57% followed by NBFi (-0.34%), Pharmaceutical (-0.29%), Bank (-0.25%). Block trades contributed 1.3% of the overall market turnover. Fu Wang Food Ltd. (+9.0%) was the most traded share with a turnover of BDT 342 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,301.09	6,327.65	-26.56	-0.42%	-6.7%
DS30	2,286.60	2,298.60	-12.00	-0.52%	-9.7%
DSES	1,378.87	1,382.93	-4.06	-0.29%	-3.7%
CDSET	1,256.54	1,261.66	-5.12	-0.41%	-7.5%

	Advanced	Declined	Unchanged	Total
All Category	94	230	57	381
A Category (Equity)	51	173	38	262
B Category (Equity)	30	47	12	89
N Category (Equity)	3	4	0	7
Z Category (Equity)	10	6	7	23
Mutual Funds	4	12	19	35
Corporate Bonds	1	2	1	4

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,131,907	5,143,165	
	Mn USD	55,211	55,333	-0.2%
Turnover	Mn BDT	5,944	6,837	-13.1%
	Mn USD	64	74	
Volume	Mn Shares	160	158	+1.2%
No. of Trade		128,772	140,250	-8.2%

* Exchange Rate is BDT 92.95 as of Jun 26, 2022

Figure: Sectorial Turnover (BDT)

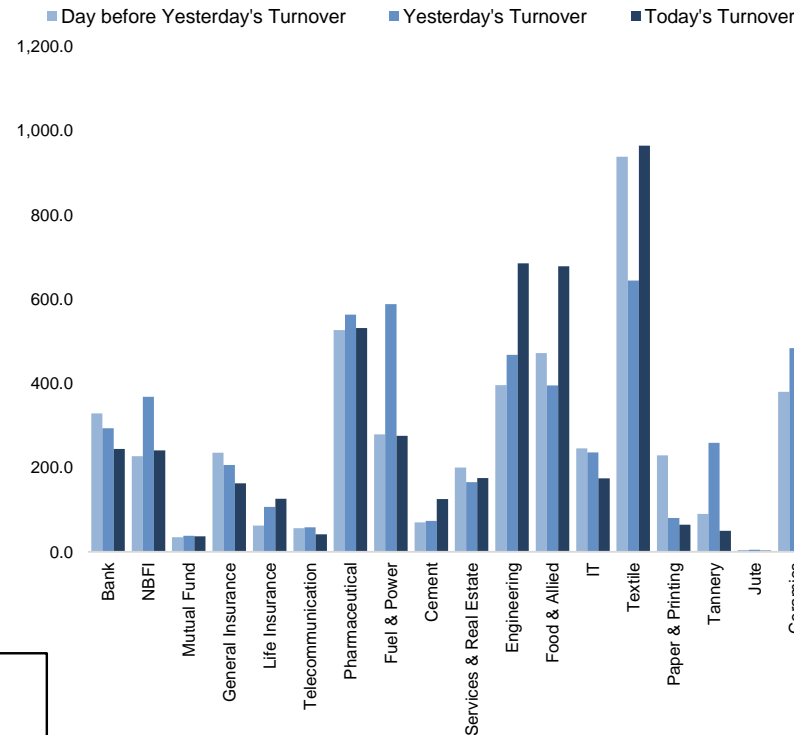
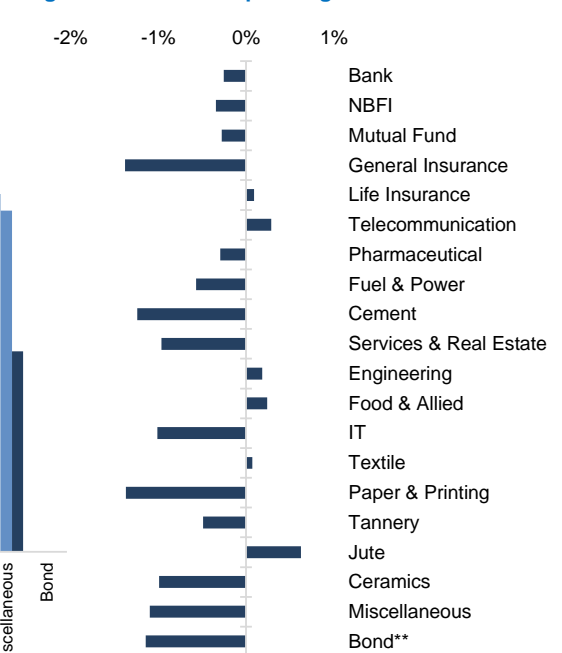


Figure: Sectorial Mcap Change



Market PE 15.7x
Market PB 1.7x

Fahim Hassan Research Associate (880) 1709636546 fahim.hassan@bracepl.com	Billal Hossain Research Associate (880) 1708805229 billal.hossain@bracepl.com
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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	1,428	1,432	-3.62	-0.25%	33	656,377	14.5%	244.6	4.5%	7.8x	0.8x	GP	412,652	9.1%	11.5	12.4x	7.1x
NBFI	1,978	1,984	-6.80	-0.34%	23	194,567	4.3%	240.7	4.4%	NM	3.6x	WALTONHIL	327,163	7.3%	18.7	22.9x	3.4x
Mutual Fund	867	870	-2.41	-0.28%	36	38,382	0.9%	36.6	0.7%	NM	0.8x	BATBC	293,058	6.5%	28.3	19.2x	8.9x
General Insurance	3,355	3,402	-46.86	-1.38%	41	98,991	2.2%	162.4	3.0%	15.7x	1.6x	SQURPHARMA	191,296	4.2%	72.4	10.3x	1.9x
Life Insurance	2,303	2,301	+2.12	+0.09%	13	64,680	1.4%	125.9	2.3%	NM	NM	ROBI	149,805	3.3%	15.8	81.7x	2.2x
Telecommunication	5,068	5,054	+14.52	+0.29%	3	597,515	13.2%	41.6	0.8%	15.9x	4.4x	UPGDCL	143,996	3.2%	7.4	11.6x	4.4x
Pharmaceutical	3,760	3,771	-11.02	-0.29%	32	705,766	15.6%	531.5	9.8%	17.4x	2.5x	RENATA	141,913	3.1%	17.3	25.6x	5.0x
Fuel & Power	1,794	1,805	-10.27	-0.57%	23	468,191	10.4%	275.5	5.1%	11.6x	1.2x	BEXIMCO	115,849	2.6%	194.8	8.1x	1.5x
Cement	2,388	2,418	-29.95	-1.24%	7	116,957	2.6%	125.0	2.3%	24.8x	2.5x	BERGERPBL	82,910	1.8%	0.0	28.5x	7.9x
Services & Real Estate	1,408	1,422	-13.69	-0.96%	8	53,520	1.2%	175.4	3.2%	87.5x	1.0x	LHBL	78,857	1.7%	73.8	20.8x	4.5x
Engineering	4,643	4,634	+8.53	+0.18%	42	542,840	12.0%	684.8	12.6%	18.9x	1.9x	ICB	78,809	1.7%	2.1	44.6x	1.8x
Food & Allied	22,017	21,964	+53.33	+0.24%	21	391,424	8.7%	678.5	12.5%	23.7x	9.2x	MARICO	74,989	1.7%	13.2	21.1x	27.9x
IT	2,613	2,640	-26.66	-1.01%	11	33,071	0.7%	174.6	3.2%	26.9x	2.3x	BXPBARMA	70,486	1.6%	16.4	12.3x	1.8x
Textile	1,561	1,560	+1.14	+0.07%	58	168,675	3.7%	964.8	17.7%	25.2x	1.0x	BEACONPHAR	60,083	1.3%	6.5	64.2x	10.3x
Paper & Printing	7,200	7,300	-99.97	-1.37%	6	25,763	0.6%	64.5	1.2%	NM	1.8x	BRACBANK	58,068	1.3%	20.4	10.9x	1.1x
Tannery	3,298	3,314	-16.19	-0.49%	6	35,200	0.8%	49.7	0.9%	49.7x	3.5x	ISLAMIBANK	52,647	1.2%	6.3	10.7x	0.8x
Jute	8,358	8,306	+52.09	+0.63%	3	1,924	0.0%	2.6	0.0%	NM	27.1x	DUTCHBANGL	44,528	1.0%	4.2	7.7x	1.2x
Ceramics	790	798	-7.89	-0.99%	5	35,567	0.8%	382.8	7.0%	33.3x	2.1x	TITASGAS	40,558	0.9%	61.2	12.1x	0.6x
Miscellaneous	4,458	4,508	-49.39	-1.10%	15	247,604	5.5%	476.2	8.8%	12.2x	2.1x	POWERGRID	40,269	0.9%	18.5	11.0x	0.4x
Bond**	90	91	-1.04	-1.14%	9	37,535	0.8%	0.2	0.0%	NM	NM	SUMITPOWER	39,832	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
GHCL	37.7	+9.9%	19.9	NM	0.7x	SQURPHARMA	125,165	7.4%	10.3x	1.9x	FUWANGFOOD	25.5	+9.0%	342.3	NM	2.2x
MEGHNAINS	33.9	+9.7%	0.2	46.8x	2.4x	BATBC	77,514	4.6%	19.2x	8.9x	ANWARGALV	424.9	+1.1%	286.8	39.1x	25.2x
MEGCONMILK	29.1	+9.4%	13.6	NM	NM	BEXIMCO	77,214	4.6%	8.1x	1.5x	SPCERAMICS	50.0	-0.4%	259.2	NM	1.6x
PRIMETEX	30.9	+9.2%	86.0	9.6x	0.5x	RENATA	69,154	4.1%	25.6x	5.0x	BEXIMCO	132.2	-1.9%	194.8	8.1x	1.5x
FUWANGFOOD	25.5	+9.0%	342.3	NM	2.2x	BXPBARMA	49,213	2.9%	12.3x	1.8x	SALVOCHEM	68.0	+4.0%	137.8	28.3x	4.5x
MEGHNA PET	35.5	+7.6%	8.6	NM	NM	BEACONPHAR	42,058	2.5%	64.2x	10.3x	JHRML	82.6	-1.7%	128.2	27.9x	2.7x
SAVAREFR	232.6	+7.5%	2.0	NM	3322.9x	GP	41,265	2.4%	12.4x	7.1x	IPDC	56.1	-1.2%	119.1	23.2x	3.2x
MHSML	30.0	+6.8%	37.8	14.1x	1.8x	BRACBANK	31,217	1.8%	10.9x	1.1x	MONNOFABR	27.8	+1.8%	98.9	NM	1.1x
ARAMITCEM	33.3	+6.1%	24.8	NM	1.5x	LHBL	27,852	1.6%	20.8x	4.5x	METROSPIN	27.4	+3.4%	97.5	19.4x	1.4x
BDWELDING	23.0	+6.0%	18.4	NM	2.0x	ISLAMIBANK	25,628	1.5%	10.7x	0.8x	PRIMETEX	30.9	+9.2%	86.0	9.6x	0.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	18,652	1.1%	NM	0.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FASFIN	4.9	-2.0%	1.2	NM	NM	PUBALIBANK	17,750	1.0%	5.7x	0.6x	RENATA	1,318.0	1,318.0	1.0	76	100.56
BEACONPHAR	260.1	-2.0%	6.5	64.2x	10.3x	CITYBANK	16,376	1.0%	4.6x	0.7x	BANKASIA	19.6	19.6	2.0	5,130	100.55
PAPERPROC	177.0	-2.0%	22.7	58.0x	6.0x	ALARABANK	15,723	0.9%	11.6x	1.2x	SALVOCHEM	66.5	64.4	9.0	1,085	70.80
SONALIPAPR	516.3	-2.0%	16.2	36.5x	2.1x	OLYMPIC	15,547	0.9%	14.7x	2.8x	FORTUNE	102.5	95.2	8.0	725	70.37
HRTEX	98.6	-2.0%	47.1	31.3x	2.3x	BSRMLTD	15,266	0.9%	5.3x	0.7x	IPDC	58.7	55.7	5.0	581	32.52
PURABIGEN	29.6	-2.0%	2.5	25.2x	2.2x	ROBI	14,980	0.9%	81.7x	2.2x	PRIMEINSUR	99.9	99.8	8.0	256	25.56
TAMIJTEX	197.6	-2.0%	5.0	33.0x	2.3x	SUMITPOWER	14,654	0.9%	9.5x	1.1x	SHAHJABANK	19.6	19.6	2.0	907	17.77
MONOSPOOL	168.2	-2.0%	8.7	55.3x	4.0x	UPGDCL	14,400	0.9%	11.6x	4.4x	AL-HAJTEX	120.4	115.6	6.0	135	15.84
EIL	29.9	-2.0%	5.6	14.8x	1.7x						SAIFPOWER	31.8	31.8	2.0	461	14.66
CITYGENINS	29.9	-2.0%	1.0	19.0x	1.6x						BXPBARMA	169.0	158.5	4.0	68	11.06

*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
RENATA	1,318.0	1,318.0	100.6	76	1
BANKASIA	19.6	19.6	100.5	5,130	2
SALVOCHEM	66.5	64.4	70.8	1,085	9
FORTUNE	102.5	95.2	70.4	725	8
IPDC	58.7	55.7	32.5	581	5
PRIMEINSUR	99.9	99.8	25.6	256	8
SHAHJABANK	19.6	19.6	17.8	907	2
AL-HAJTEX	120.4	115.6	15.8	135	6
SAIFPOWER	31.8	31.8	14.7	461	2
BXPHARMA	169.0	158.5	11.1	68	4
PHOENIXFIN	18.9	18.9	7.8	415	2
JAMUNABANK	22.7	22.7	5.7	250	2
SOUTHEASTB	14.0	14.0	4.3	308	1
JHRML	89.8	89.8	3.0	33	1
CENTRALINS	41.5	41.5	2.5	60	1
ONEBANKLTD	10.6	10.6	2.3	221	1
PTL	77.1	77.1	2.2	29	1
BSC	120.0	116.8	2.0	17	3
LOVELLO	41.5	41.5	2.0	47	1
ICBAGRANI1	10.3	10.3	1.9	180	1
EXIMBANK	11.3	11.3	1.8	162	1
ANLIMAYARN	39.3	39.3	1.8	46	1
Total			505.8		75

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
MIDAS Financing Ltd.	-	1.0%	1.0%	Record Date	29-Jun-22
APSCL Non-Convertible and Fully Redeemable Coupon Be	-	0.0%	5.3%	Record Date	4-Jul-22
Janata Insurance Company Ltd.	-	5.0%	6.0%	Record Date	7-Jul-22
Bangladesh General Insurance Company Ltd.	-	0.0%	12.5%	Record Date	7-Jul-22
Pragati Life Insurance Ltd.	-	6.0%	11.0%	Record Date	7-Jul-22
Prime Insurance Company Ltd.	-	0.0%	15.0%	Record Date	12-Jul-22
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
Kay & Que (Bangladesh) Ltd.	-	0.0%	5.0%	Record Date	Notify later

Important DSE News

SKICL

The Company informed that the management has completed the process for signing of the purchase agreement of a property. Details of Property: 964 sqft spaces at the 4th floor of Sena Kalyan Trade Center (SKTC), Agrabad, at a total cost of TK. 72,00,000.00 only excluding registration expenses. The Company also informed that the money has been paid from the IPO fund.

MONOSPOOL

Mr. Mustafa Kamal Mohiuddin, one of the Sponsor Directors of the company, has further informed that he has completed his selling of 18, 684 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 13.06.2022.

Pearl Paper and Board Mills Ltd., one of the Sponsors of the Company, has further informed that it has completed its sale of 55,000 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 22.06.2022.

Referring to the BSEC letter No. SEC/SRMIC/94-22/179 dated April 28, 2022, Pearl Paper and Board Mills Ltd., one of the Sponsors of the Company, has expressed its intention to sell 1,00,000 shares out of its holding 1,63,526 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days.

PAPERPROC

Mr. Mustafa Kamal Mohiuddin, one of the Sponsor Directors of the company, has further informed that he has completed his selling of 1,00,980 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 08.06.2022.

NCCBANK

Credit Rating Information and Services Limited (CRISL) has rated the Company as "AA" in the long term and "ST-1" in the short term along with a Stable outlook in consideration of audited financial statements of the Company up to December 31, 2021, unaudited financials up to March 31, 2022 and other relevant quantitative as well as qualitative information up to the date of rating declaration.

RANFOUNDRY

Credit Rating Information and Services Limited (CRISL) has rated the Company as "AA-" in the long term and "ST-3" in the short term along with a Stable outlook in consideration of audited financial statements of the Company up to June 30, 2021, un-audited financials up to March 31, 2022 and other relevant quantitative as well as qualitative information up to the date of rating declaration.

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