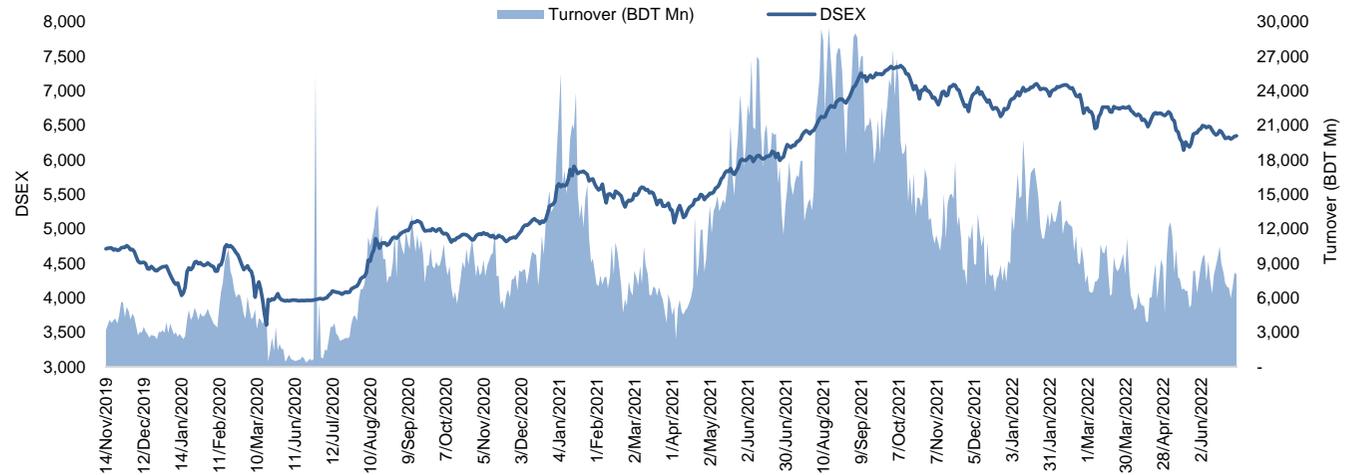


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.12%) gained 7.88 points and closed at 6,350.47. The blue-chip index DS30 (+0.03%), the Shariah-based index DSES (-0.02%), and the large-cap index CDSET (+0.11%) closed at 2,295.18, 1,385.41, and 1,261.32 points, respectively. Most of the large-cap sectors posted positive performance today. Bank booked the highest gain of 0.81% followed by Pharmaceutical (+0.29%), Fuel & Power (+0.25%), Engineering (+0.18%), Food & Allied (+0.00%), Telecommunication (-0.57%), and NBFi (-0.60%), respectively. Block trades contributed 1.2% of the overall market turnover. Anwar Galvanizing Ltd. (0.0%) was the most traded share with a turnover of BDT 343 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,350.47	6,342.59	+7.88	+0.12%	-6.0%
DS30	2,295.18	2,294.58	+0.60	+0.03%	-9.4%
DSES	1,385.41	1,385.65	-0.25	-0.02%	-3.2%
CDSET	1,261.32	1,259.98	+1.34	+0.11%	-7.2%

	Advanced	Declined	Unchanged	Total
All Category	157	172	52	381
A Category (Equity)	111	114	38	263
B Category (Equity)	40	41	7	88
N Category (Equity)	3	3	1	7
Z Category (Equity)	3	14	6	23
Mutual Funds	4	10	21	35
Corporate Bonds	3	3	0	6

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,159,388	5,157,489	
	Mn USD	55,211	55,190	+0.0%
Turnover	Mn BDT	8,057	8,188	-1.6%
	Mn USD	86	88	
Volume	Mn Shares	221	227	-2.4%
No. of Trade		160,045	167,385	-4.4%

* Exchange Rate is BDT 93.45 as of Jun 29, 2022

Figure: Sectorial Turnover (BDT)

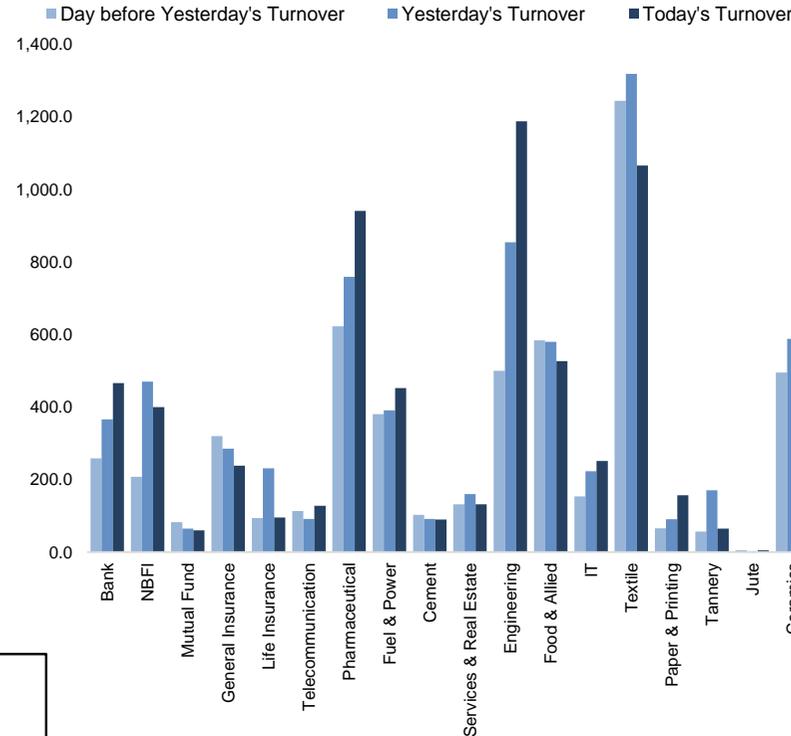
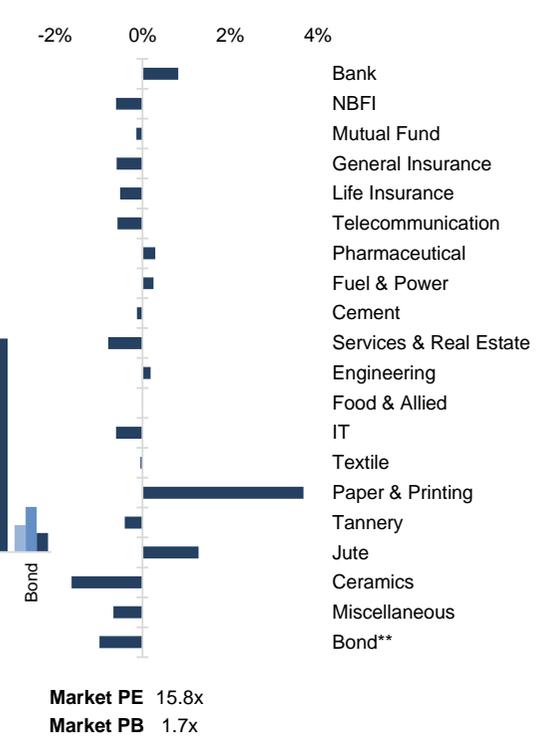


Figure: Sectorial Mcap Change



Market PE 15.8x
Market PB 1.7x

Fahim Hassan
Research Associate
(880) 1709636546
fahim.hassan@bracepl.com

Billal Hossain
Research Associate
(880) 1708805229
billal.hossain@bracepl.com

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	1,449	1,437	+11.70	+0.81%	33	665,841	14.7%	466.0	6.3%	7.9x	0.8x	GP	405,225	8.9%	99.1	12.2x	7.0x
NBFI	1,971	1,983	-11.93	-0.60%	23	193,922	4.3%	399.4	5.4%	NM	3.6x	WALTONHIL	332,222	7.3%	3.8	23.2x	3.4x
Mutual Fund	882	883	-1.22	-0.14%	36	39,020	0.9%	59.8	0.8%	NM	0.8x	BATBC	293,004	6.5%	76.5	19.2x	8.9x
General Insurance	3,380	3,400	-20.07	-0.59%	41	99,734	2.2%	238.5	3.2%	15.9x	1.6x	SQURPHARMA	193,246	4.3%	77.1	10.4x	1.9x
Life Insurance	2,305	2,317	-11.90	-0.51%	13	64,734	1.4%	95.2	1.3%	NM	NM	ROBI	149,805	3.3%	19.2	81.7x	2.2x
Telecommunication	5,010	5,039	-28.83	-0.57%	3	590,682	13.0%	127.8	1.7%	15.8x	4.3x	UPGDCL	145,330	3.2%	8.8	11.8x	4.4x
Pharmaceutical	3,793	3,782	+10.93	+0.29%	32	711,943	15.7%	940.4	12.7%	17.5x	2.5x	RENATA	143,714	3.2%	14.5	26.0x	5.1x
Fuel & Power	1,812	1,808	+4.56	+0.25%	23	472,799	10.4%	452.1	6.1%	11.7x	1.2x	BEXIMCO	114,973	2.5%	232.2	8.0x	1.5x
Cement	2,398	2,402	-3.09	-0.13%	7	117,447	2.6%	89.4	1.2%	24.9x	2.5x	BERGERPBL	80,317	1.8%	4.3	27.6x	7.6x
Services & Real Estate	1,425	1,436	-11.26	-0.78%	8	54,164	1.2%	131.4	1.8%	88.5x	1.0x	LHBL	78,973	1.7%	59.1	20.9x	4.5x
Engineering	4,717	4,708	+8.64	+0.18%	42	551,532	12.1%	1,187.8	16.1%	19.2x	1.9x	ICB	78,809	1.7%	4.5	44.6x	1.8x
Food & Allied	22,009	22,009	+0.65	+0.00%	21	391,279	8.6%	526.7	7.1%	23.7x	9.2x	MARICO	76,069	1.7%	7.4	21.4x	28.3x
IT	2,626	2,642	-15.89	-0.60%	11	33,231	0.7%	251.4	3.4%	27.0x	2.3x	BXPBARMA	69,593	1.5%	55.8	12.1x	1.8x
Textile	1,596	1,597	-0.69	-0.04%	58	172,503	3.8%	1,065.9	14.4%	25.7x	1.1x	BRACBANK	62,258	1.4%	73.1	11.7x	1.1x
Paper & Printing	7,451	7,187	+264.44	+3.68%	6	26,662	0.6%	156.6	2.1%	NM	1.8x	BEACONPHAR	59,968	1.3%	19.7	64.1x	10.3x
Tannery	3,224	3,237	-13.16	-0.41%	6	34,408	0.8%	64.4	0.9%	48.6x	3.4x	ISLAMIBANK	52,969	1.2%	7.5	10.8x	0.8x
Jute	8,534	8,427	+107.95	+1.28%	3	1,964	0.0%	5.0	0.1%	NM	27.7x	DUTCHBANGL	44,876	1.0%	4.5	7.8x	1.2x
Ceramics	805	818	-13.25	-1.62%	5	36,256	0.8%	490.0	6.6%	34.0x	2.2x	TITASGA	41,152	0.9%	39.8	12.3x	0.6x
Miscellaneous	4,407	4,436	-29.50	-0.67%	15	244,746	5.4%	588.9	8.0%	12.0x	2.1x	SUMITPOWER	40,045	0.9%	13.0	9.5x	1.1x
Bond**	93	94	-0.92	-0.98%	9	38,690	0.9%	52.2	0.7%	NM	NM	POWERGRID	39,984	0.9%	51.8	10.9x	0.4x

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
MEGHNAINS	44.9	+9.8%	2.5	62.1x	3.1x	SQURPHARMA	126,441	7.4%	10.4x	1.9x	ANWARGALV	412.8	-0.0%	343.4	38.0x	24.5x
INTRACO	22.8	+9.6%	149.9	21.8x	1.9x	BATBC	77,500	4.5%	19.2x	8.9x	SPCERAMICS	52.7	-1.9%	274.4	NM	1.7x
AMBEEPHA	533.3	+8.6%	25.5	NM	27.5x	BEXIMCO	76,630	4.5%	8.0x	1.5x	BEXIMCO	131.2	-0.9%	232.2	8.0x	1.5x
PAPERPROC	184.6	+8.0%	23.0	60.5x	6.2x	RENATA	70,032	4.1%	26.0x	5.1x	BDFINANCE	49.1	-1.4%	218.9	35.4x	2.7x
IMAMBUTTON	132.6	+7.9%	30.9	NM	27.6x	BXPBARMA	48,590	2.8%	12.1x	1.8x	FUWANGFOOC	25.4	-0.8%	217.5	NM	2.2x
RENWICKJA	1,039.2	+7.5%	5.1	NM	NM	BEACONPHAR	41,977	2.5%	64.1x	10.3x	ORIONPHARM	88.5	+0.8%	212.8	21.6x	1.1x
ISNLTD	55.0	+7.0%	40.0	NM	19.0x	GP	40,523	2.4%	12.2x	7.0x	RAK CERAMIC	49.3	-1.8%	154.2	22.5x	2.9x
AZIZPIPES	101.8	+6.6%	11.0	NM	NM	BRACBANK	33,470	2.0%	11.7x	1.1x	INTRACO	22.8	+9.6%	149.9	21.8x	1.9x
SONALIPAPR	549.4	+6.4%	89.6	38.8x	2.2x	LHBL	27,893	1.6%	20.9x	4.5x	BSC	117.9	+2.0%	145.1	8.7x	1.7x
MONOSPOOL	172.4	+6.3%	13.9	56.7x	4.1x	ISLAMIBANK	25,785	1.5%	10.8x	0.8x	ACMEPL	34.5	+6.2%	140.2	20.4x	1.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	NBL	18,422	1.1%	NM	0.5x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PROGRESLIF	78.8	-2.0%	1.0	NM	NM	PUBALIBANK	18,032	1.1%	5.8x	0.6x	SONALIPAPR	530.0	522.0	5.0	231	121.19
JANATAINS	34.6	-2.0%	10.3	29.1x	2.3x	CITYBANK	16,447	1.0%	4.6x	0.7x	RENATA	1,350.0	1,340.0	2.0	79	106.72
DSHGARME	163.3	-2.0%	4.9	NM	8.1x	ALARABANK	15,847	0.9%	11.7x	1.2x	FORTUNE	100.0	91.0	5.0	982	94.58
BANGAS	139.1	-2.0%	22.3	NM	6.6x	OLYMPIC	15,472	0.9%	14.7x	2.8x	PRIMEINSUR	103.0	94.2	7.0	584	57.11
FORTUNE	89.7	-2.0%	45.8	28.9x	5.9x	BSRMLTD	15,426	0.9%	5.3x	0.7x	APSCLBOND	5,470.0	5,461.0	3.0	10	52.33
DAFODILCOM	70.1	-2.0%	1.2	94.7x	5.3x	ROBI	14,980	0.9%	81.7x	2.2x	IPDC	58.5	56.0	3.0	646	37.56
GENEXIL	75.8	-1.9%	62.9	22.3x	4.1x	SUMITPOWER	14,733	0.9%	9.5x	1.1x	KTL	29.8	29.8	6.0	1,090	32.48
BNICL	65.8	-1.9%	16.9	19.8x	2.9x	UPGDCL	14,533	0.9%	11.8x	4.4x	DHAKABANK	14.6	14.6	2.0	1,802	26.31
SAVAREFR	237.9	-1.9%	0.3	NM	3398.6x						BSCCL	215.0	215.0	7.0	74	16.00
GHCL	35.6	-1.9%	0.7	NM	0.7x						DOREENPWR	76.7	76.7	3.0	148	11.35

*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
SONALIPAPR	530.0	522.0	121.2	231	5
RENATA	1,350.0	1,340.0	106.7	79	2
FORTUNE	100.0	91.0	94.6	982	5
PRIMEINSUR	103.0	94.2	57.1	584	7
APSCLBOND	5,470.0	5,461.0	52.3	10	3
IPDC	58.5	56.0	37.6	646	3
KTL	29.8	29.8	32.5	1,090	6
DHAKABANK	14.6	14.6	26.3	1,802	2
BSCCL	215.0	215.0	16.0	74	7
DOREENPWR	76.7	76.7	11.4	148	3
JAMUNABANK	23.8	22.7	11.3	495	5
MERCANBANK	15.4	15.4	8.6	561	1
LINDEBD	1,432.0	1,432.0	7.2	5	1
ALARABANK	28.0	28.0	7.0	250	2
BEXGSUKUK	94.0	93.0	7.0	75	3
NCCBANK	15.1	15.1	6.5	430	1
SEAPEARL	48.6	48.6	6.1	126	1
MARICO	2,408.0	2,408.0	5.4	2	3
IMAMBUTTON	120.5	120.5	4.8	40	2
INTRACO	22.8	22.0	4.6	205	4
PADMALIFE	50.0	50.0	4.3	87	1
GSPFINANCE	31.0	31.0	3.5	112	1
Total			668.0		97

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
NRB Commercial Bank Limited	-	7.5%	0.0%	Record Date	13-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
IFIC

Emerging Credit Rating Limited (ECRL) has assigned rating of the Company as "AA" in the long term and "ST-2" in the short term along with a Stable outlook based on audited financial statements of the Company as on December 31, 2021 and other relevant quantitative as well as qualitative information up to the date of rating.

NRBCBANK

The Company has further informed that BSEC has accorded consent for issuance of 7.50% Stock Dividend for the year ended December 31, 2021. The Company has also informed that the Board of Directors has fixed the Record date on 13.07.2022 for entitlement of the aforesaid Bonus Shares.

DELTALIFE

The Company has informed that Mr. Kazi Fazlur Rahman, one of the Independent Directors of the company passed away on 15.11.2019. His present holding 49,500 shares will be transmitted to the account of his nominee Mr. Kazi Tanvir F. Rahman (son of Late Mr. Kazi Fazlur Rahman) by way of nomination.

FIRSTFIN

WASO Credit Rating Company (BD) Ltd. (WCRCL) has announced the entity rating of the Company as "BBB2" in the long term and "ST-3" in the short term along with a Stable outlook based on audited financial statement of December 31, 2020 and other relevant quantitative and qualitative information up to the date of rating issuance.

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