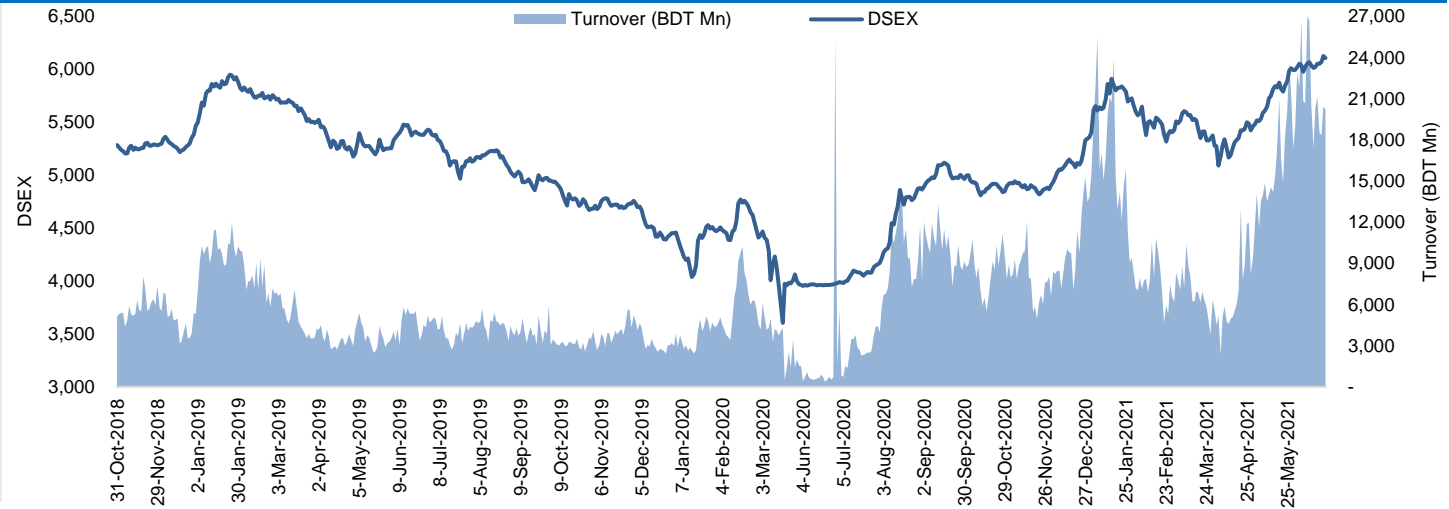


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.32%) lost 19.68 points and closed at 6,105.73. The blue-chip index DS30 (-0.68%), the Shariah-based index DSES (-0.10%), and the large-cap index CDSET (-0.43%) closed at 2,205.70, 1,304.31, and 1,229.38 points, respectively. All the large-cap sectors posted negative performance today except Telecommunication (+1.01%). NBF1 experienced the highest loss of 0.79% followed by Food & Allied (-0.69%), Bank (-0.47%), Engineering (-0.31%), Fuel & Power (-0.10%), and Pharmaceutical (-0.10%), respectively. Block trades contributed 3.7% of the overall market turnover. Pioneer Insurance Company Ltd. (-2.6%) was the most traded share with a turnover of BDT 1,480 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,105.73	6,125.41	-19.68	-0.32%	+13.0%
DS30	2,205.70	2,220.89	-15.19	-0.68%	+12.3%
DSES	1,304.31	1,305.57	-1.26	-0.10%	+5.0%
CDSET	1,229.38	1,234.73	-5.35	-0.43%	+9.5%

	Advanced	Declined	Unchanged	Total
All Category	134	204	31	369
A Category (Equity)	89	157	22	268
B Category (Equity)	29	28	1	58
N Category (Equity)	2	8	1	11
Z Category (Equity)	14	11	7	32
Mutual Funds	6	20	10	36
Corporate Bonds	2	0	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,124,629	5,130,872	-0.1%
	Mn USD	60,318	60,392	
Turnover	Mn BDT	20,176	20,435	-1.3%
	Mn USD	237	241	
Volume	Mn Shares	659	634	+3.9%
No. of Trade		311,479	291,726	+6.8%

Figure: Sectorial Turnover (BDT Mn)

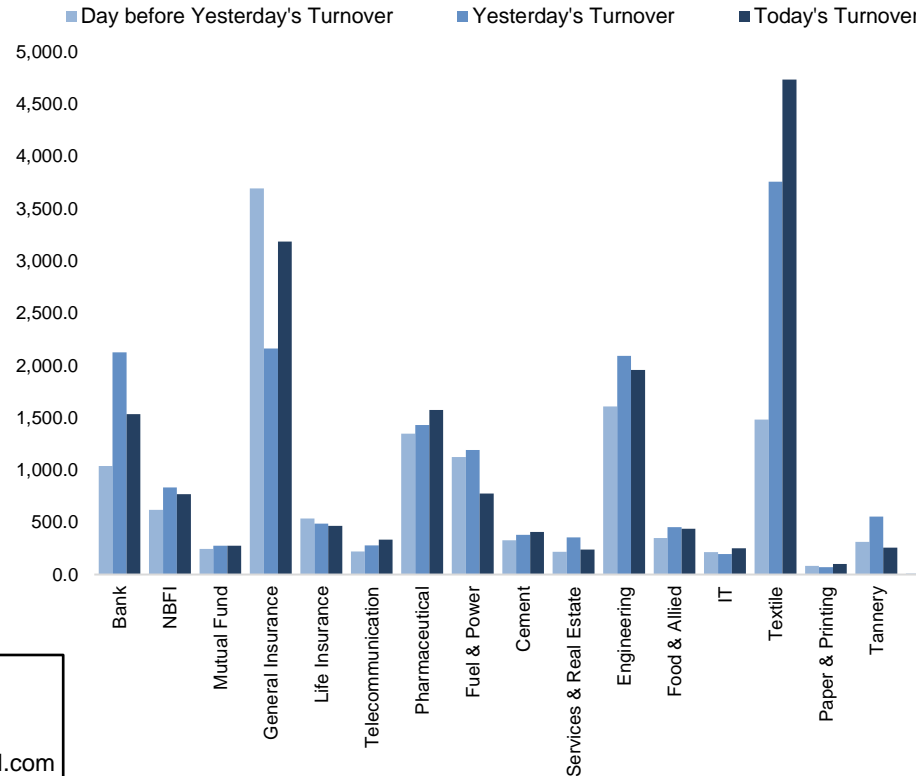
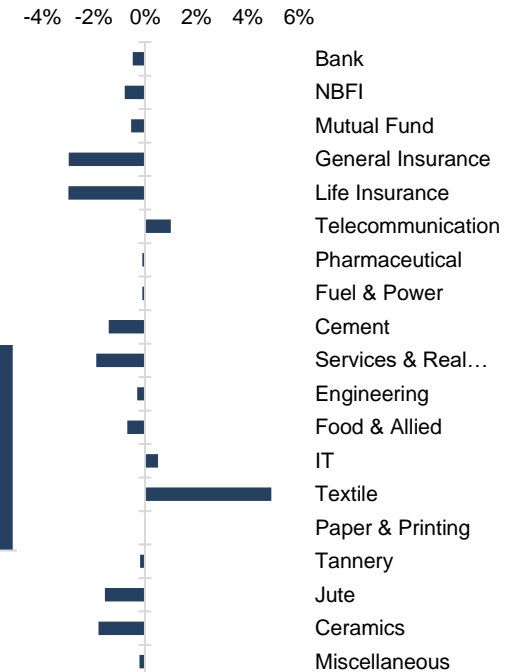


Figure: Sectorial Mcap Change



Market PE 19.2x
Market PB 1.9x

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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	1,517	1,525	-7.18	-0.47%	31	655,620	14.4%	1,534.3	7.9%	8.6x	0.8x	GP	466,124	10.3%	70.1	13.2x	7.6x
NBFI	2,086	2,103	-16.60	-0.79%	23	204,932	4.5%	768.5	4.0%	44.2x	3.2x	WALTONHIL	410,014	9.0%	22.3	41.0x	7.2x
Mutual Fund	1,009	1,015	-5.46	-0.54%	37	45,557	1.0%	276.4	1.4%	NM	0.9x	BATBC	292,734	6.4%	209.1	25.0x	7.7x
General Insurance	5,607	5,778	-171.47	-2.97%	38	145,017	3.2%	3,183.5	16.4%	27.2x	2.7x	ROBI	235,707	5.2%	212.1	NM	3.6x
Life Insurance	2,618	2,699	-80.57	-2.99%	12	71,572	1.6%	465.3	2.4%	NM	NM	SQURPHARMA	189,435	4.2%	170.7	13.1x	2.2x
Telecommunication	6,218	6,155	+62.30	+1.01%	3	730,475	16.1%	334.1	1.7%	18.8x	5.4x	UPGDCL	159,706	3.5%	21.7	16.5x	5.3x
Pharmaceutical	3,460	3,464	-3.57	-0.10%	31	630,395	13.9%	1,572.0	8.1%	20.7x	2.6x	RENATA	126,585	2.8%	12.9	27.6x	5.2x
Fuel & Power	1,710	1,711	-1.78	-0.10%	22	457,159	10.1%	774.3	4.0%	12.4x	1.4x	ICB	90,251	2.0%	20.5	43.6x	2.0x
Cement	2,012	2,041	-28.82	-1.41%	7	118,131	2.6%	407.7	2.1%	20.7x	2.5x	BEXIMCO	84,613	1.9%	968.9	23.3x	1.3x
Services & Real Estate	1,099	1,120	-21.31	-1.90%	8	42,684	0.9%	238.4	1.2%	NM	0.9x	BERGERPBL	83,151	1.8%	25.9	33.7x	8.5x
Engineering	4,991	5,006	-15.27	-0.31%	42	609,260	13.4%	1,956.4	10.1%	30.3x	2.8x	BXPBARMA	78,783	1.7%	96.2	17.3x	2.2x
Food & Allied	21,309	21,458	-148.77	-0.69%	20	385,568	8.5%	439.1	2.3%	32.8x	8.1x	MARICO	70,040	1.5%	10.3	22.5x	42.8x
IT	2,688	2,675	+13.58	+0.51%	11	31,920	0.7%	250.3	1.3%	29.5x	2.3x	BRACBANK	66,685	1.5%	41.3	13.8x	1.3x
Textile	1,382	1,317	+64.83	+4.92%	58	145,984	3.2%	4,733.0	24.4%	NM	1.0x	LHBL	66,547	1.5%	172.9	23.2x	3.6x
Paper & Printing	5,106	5,106	+0.29	+0.01%	6	14,629	0.3%	100.1	0.5%	39.3x	1.0x	DUTCHBANGL	47,300	1.0%	254.0	8.4x	1.4x
Tannery	2,016	2,020	-3.92	-0.19%	6	21,998	0.5%	256.3	1.3%	NM	2.2x	SUMITPOWER	46,880	1.0%	52.8	8.3x	1.3x
Jute	7,859	7,984	-125.16	-1.57%	3	1,938	0.0%	14.7	0.1%	NM	14.1x	ISLAMIBANK	45,080	1.0%	7.0	9.3x	0.7x
Ceramics	528	538	-9.77	-1.82%	5	26,827	0.6%	165.4	0.9%	57.4x	1.8x	TITASGAS	34,722	0.8%	28.5	9.6x	0.5x
Miscellaneous	4,007	4,015	-8.50	-0.21%	14	202,089	4.4%	1,964.7	10.1%	30.4x	2.0x	OLYMPIC	34,429	0.8%	15.0	16.6x	3.9x
												UNILEVERCL	33,377	0.7%	1.6	70.7x	22.5x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONOSPOOL	106.9	+10.0%	0.0	NM	2.6x
TAMIJTEX	25.4	+10.0%	0.0	84.7x	0.3x
MALEKSPIN	28.8	+9.9%	48.3	NM	0.6x
SQUARETEXT	46.6	+9.9%	61.2	50.9x	1.3x
PRIMETEX	22.2	+9.9%	25.5	NM	0.3x
MAKSONSPIN	21.1	+9.9%	499.8	28.9x	1.1x
METROSPIN	20.0	+9.9%	104.7	23.0x	1.3x
DSSL	18.9	+9.9%	325.5	17.7x	1.1x
ARGONDENIM	24.5	+9.9%	173.4	28.5x	0.9x
HWAWELLTEX	42.4	+9.8%	14.1	25.0x	1.4x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	123,947	7.6%	13.1x	2.2x
BATBC	77,428	4.8%	25.0x	7.7x
RENATA	61,799	3.8%	27.6x	5.2x
BEXIMCO	58,764	3.6%	23.3x	1.3x
BXPBARMA	55,007	3.4%	17.3x	2.2x
GP	46,612	2.9%	13.2x	7.6x
BRACBANK	35,850	2.2%	13.8x	1.3x
LHBL	23,504	1.4%	23.2x	3.6x
ROBI	23,453	1.4%	NM	3.6x
EBL	23,176	1.4%	7.3x	0.9x
ISLAMIBANK	21,945	1.3%	9.3x	0.7x
OLYMPIC	20,885	1.3%	16.6x	3.9x
BEACONPHAR	19,953	1.2%	28.2x	5.4x
CITYBANK	18,481	1.1%	5.9x	0.9x
SUMITPOWER	17,247	1.1%	8.3x	1.3x
PUBALIBANK	17,189	1.1%	6.8x	0.6x
NBL	16,718	1.0%	6.8x	0.5x
UPGDCL	15,971	1.0%	16.5x	5.3x
PRIMEBANK	15,190	0.9%	8.7x	0.8x
IFIC	13,531	0.8%	17.7x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PIONEERINS	182.3	-2.6%	1,479.6	24.6x	3.8x
BEXIMCO	94.2	-0.5%	968.9	23.3x	1.3x
MAKSONSPIN	21.1	+9.9%	499.8	28.9x	1.1x
NFML	41.1	+0.2%	481.9	31.8x	3.2x
ORIONPHARM	59.2	-2.8%	328.4	21.7x	0.8x
DSSL	18.9	+9.9%	325.5	17.7x	1.1x
KTL	29.1	+9.8%	311.1	29.1x	1.7x
DUTCHBANGL	86.0	+2.1%	254.0	8.4x	1.4x
PTL	57.7	+0.5%	242.6	14.4x	2.2x
FORTUNE	48.4	+1.5%	224.5	40.3x	3.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PRIMELIFE	73.7	-17.2%	49.0	NM	NM
SEAPEARL	47.6	-9.8%	11.9	62.4x	4.2x
RELIANCINS	103.3	-6.8%	61.2	19.3x	1.7x
GREENDELTA	116.1	-6.4%	122.3	14.5x	1.7x
FAREASTLIF	62.8	-6.0%	26.8	NM	NM
SKTRIMS	43.2	-5.9%	115.4	51.7x	3.1x
RUPALIINS	42.8	-5.5%	64.6	22.9x	2.0x
PRAGATIINS	112.0	-5.5%	118.7	29.2x	2.2x
PURABIGEN	47.5	-5.2%	77.9	41.2x	3.7x
DGIC	48.6	-5.1%	33.9	60.0x	4.2x

Block Trade (Top 35)	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
SQURPHARMA	214.0	214.0	257.1	1,202	1
STANDARINS	78.5	78.5	177.9	2,267	3
GENEXIL	87.5	84.5	66.4	768	6
PIONEERINS	200.0	200.0	60.0	300	3
MALEKSPIN	28.8	24.6	32.4	1,133	14
BATBC	547.0	520.0	19.7	36	2
GBBPOWER	32.0	32.0	16.0	500	3
PTL	57.5	51.8	11.4	200	3
SALAMCRST	35.0	34.7	10.3	295	2
DUTCHBANGL	87.5	87.5	8.8	100	1

Block Trade (Top 35)	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity (‘000)	No. of Trade
DESHBANDHU	14.0	14.0	7.0	500	1
FAREASTLIF	68.0	68.0	6.8	100	1
GREENDELT	113.0	113.0	5.7	50	1
PROVATIINS	190.0	190.0	5.3	28	1
IFADAUTOS	53.0	52.0	4.8	92	2
NRBCBANK	36.0	35.8	3.9	108	2
DSSL	18.9	17.7	3.5	189	3
SALVOCHEM	30.2	30.2	3.0	100	1
ACMELAB	76.0	76.0	3.0	40	1
KTL	27.5	27.0	2.7	101	4
MEGHNALIFE	90.0	90.0	2.7	30	1
ACFL	51.0	51.0	2.6	50	1
NHFIL	48.2	48.2	2.4	50	1
MARICO	2,130.0	2,130.0	2.1	1	1
MHSML	20.6	20.6	2.1	100	1
ORIONPHARM	65.7	61.8	2.0	32	2
DHAKAINS	101.3	101.3	2.0	20	1
CENTRALINS	65.0	60.0	2.0	32	2
EBL	32.5	32.5	2.0	60	1
AMANFEED	56.5	56.5	1.7	30	1
KARNAPHULI	46.3	46.3	1.4	30	1
ASIAPACINS	72.6	72.6	1.1	15	1
SONARBAINS	103.8	103.8	1.0	10	1
FBFIF	6.1	6.1	1.0	163	1
PEOPLESINS	50.3	50.3	1.0	19	1
Total			741.3		85

Important DSE News
PRIMELIFE

The Board of Directors has recommended No dividend for the year ended on December 31, 2020. Date of AGM: 23.08.2021, Time: 11:00 AM, Venue: Digital Platform. Record Date for AGM: 12.07.2021.

(Q1 Un-audited): Decrease in consolidated life revenue account for Jan-Mar, 2021 was Tk. 878.33 million with consolidated total life insurance fund of Tk. 7,489.39 million as against decrease in Tk. 670.44 million (solo) with life insurance fund of Tk. 8,149.83 million (solo) respectively for the same period of the previous year.

RUPALIBANK

The Board of Directors has recommended 10% stock dividend for the year ended on December 31, 2020. Date of AGM: 18.08.2021, Time: 11:00 AM, Venue: Digital Platform. Record date: 14.07.2021. The Company has also reported Consolidated EPS of Tk. 0.49, Consolidated NAV per share of Tk. 44.10 and Consolidated NOCFPS of Tk. 206.53 for the year ended on December 31, 2020 as against Tk. 1.38, Tk. 41.14 and Tk. (75.31) respectively for the same period of the previous year. The Company also informed that i) Bonus shares have been recommended to strengthen the capital base of the Company to support business growth and maintained capital to Risk Weighted Assets Ratio (CRAR) as Bangladesh Bank guideline. ii) Stock Dividend declared out of current year profit and retained earnings not from revaluation reserve or any unrealized gain or share money deposit.

SINOBANGLA

The Company has informed that the Board of Directors has decided to increase its production capacity by about 150 MT per month. To achieve additional production the Board decided to procure a tape extrusion Line Loom Machine, Needle Looms, Filler Cord, Water chiller Machine and build a Raw Material Warehouse at an investment of BDT 168.105 million which will be financed partially from internal cash and partially from Bank Loan.

FEDERALINS

The auditor of the Federal Insurance Company Ltd. has given the "Emphasis of Matter" paragraphs in the Auditor's Report for the year ended on 31 December 2020. Emphasis of Matter: We draw attention to the fact disclosed in note -4.02.04, 07, 39 and annexure -C. Note no. 4.02.04: The sponsor shareholding is 35.72% against 60% as required by insurance act 2010 section 21 (3) and schedule 1. On the other hand, the sponsors and directors of the company are holding more than the 30% shares of the paid up capital required under gazette notification no. BSEC/CMRRCD/2009-193/217/Admin/90. Dated: 15 July 2019 of Bangladesh Securities and Exchange commission. Note 7.00: Closing balance of gratuity is BDT 3,000,000 and 1,000,000 as on 31 December 2020 and 31 December 2019 respectively. The company made past service cost for defined employees benefit obligation (gratuity) Tk. 11,238,898 during the year and said cost stands at Tk. 58,988,375. Note: 39: The company is trying to amortize the outstanding Tax matters shortly (from assessment year 1998-1999 to 2018-2019) Annexure -C: The board of directors have decided to re-value company's premises at 28 Dilkhusha, Dhaka in 2021 subject to permission of the regulatory authority.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
NORTHRNINS	-	0.0%	10.0%	Record Date	23-Jun-21
REPUBLIC	-	7.0%	7.0%	Record Date	24-Jun-21
KARNAPHULI	-	0.0%	10.0%	Record Date	27-Jun-21
AMBEEPHA	-	0.0%	15.0%	Record Date	28-Jun-21

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