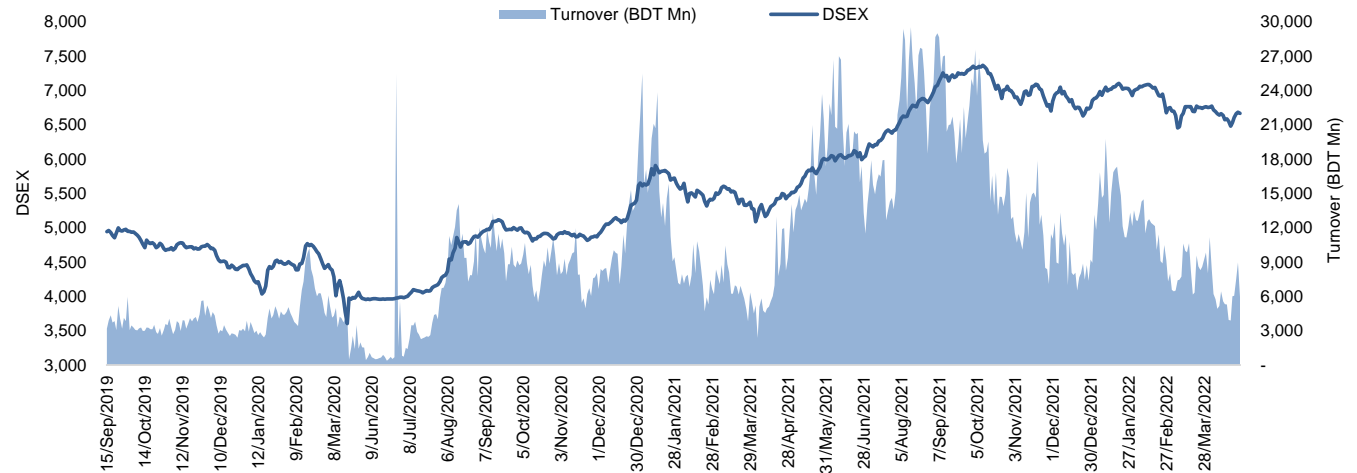


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.24%) lost 16.33 points and closed at 6,666.91. The blue-chip index DS30 (-0.38%), the Shariah-based index DSES (-0.47%), and the large-cap index CDSET (-0.34%) closed at 2,476.57, 1,454.64, and 1,343.06 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.01% followed by Food & Allied (-0.56%), Pharmaceutical (-0.47%), Telecommunication (-0.12%), Fuel & Power (-0.08%), Bank (+0.20%), and Engineering (+1.25%), respectively. Block trades contributed 1.0% of the overall market turnover. IPDC Finance Limited (-2.6%) was the most traded share with a turnover of BDT 339 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX | 6,666.91 | 6,683.24 | -16.33 | -0.24% | -1.3% |
| DS30 | 2,476.57 | 2,486.13 | -9.55 | -0.38% | -2.2% |
| DSES | 1,454.64 | 1,461.55 | -6.91 | -0.47% | +1.6% |
| CDSET | 1,343.06 | 1,347.66 | -4.60 | -0.34% | -1.2% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 113 | 222 | 43 | 378 |
| A Category (Equity) | 93 | 142 | 26 | 261 |
| B Category (Equity) | 15 | 61 | 12 | 88 |
| N Category (Equity) | 2 | 4 | 0 | 6 |
| Z Category (Equity) | 3 | 15 | 5 | 23 |
| Mutual Funds | 11 | 13 | 11 | 35 |
| Corporate Bonds | 2 | 1 | 1 | 4 |

| | | Today | Last Day | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap | Mn BDT | 5,372,872 | 5,373,662 | -0.0% |
| | Mn USD | 62,475 | 62,484 | -0.0% |
| Turnover | Mn BDT | 5,930 | 8,958 | -33.8% |
| | Mn USD | 69 | 104 | -33.8% |
| Volume | Mn Shares | 144 | 209 | -31.0% |
| No. of Trade | | 138,617 | 190,218 | -27.1% |

Figure: Sectorial Turnover (BDT)

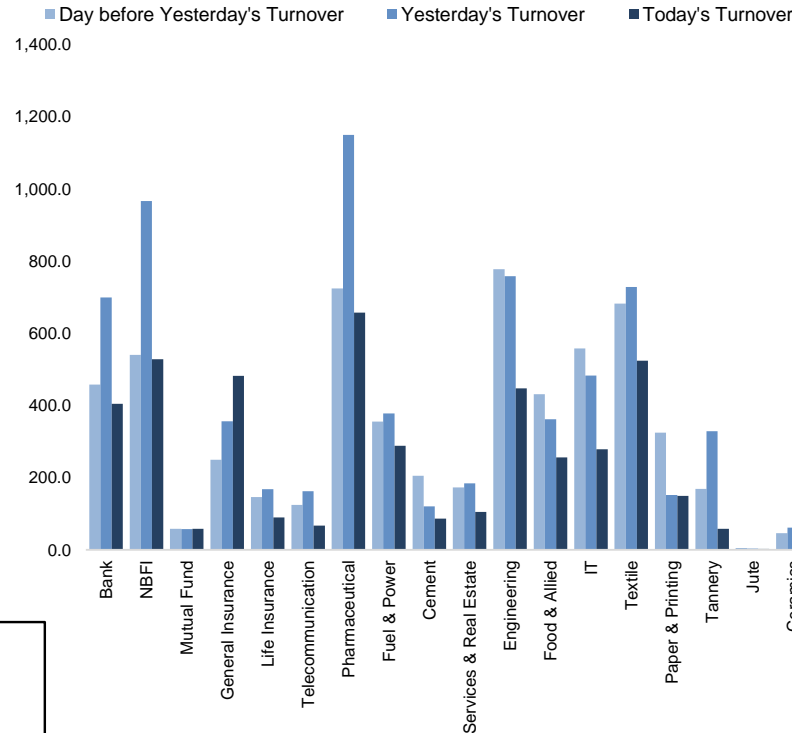
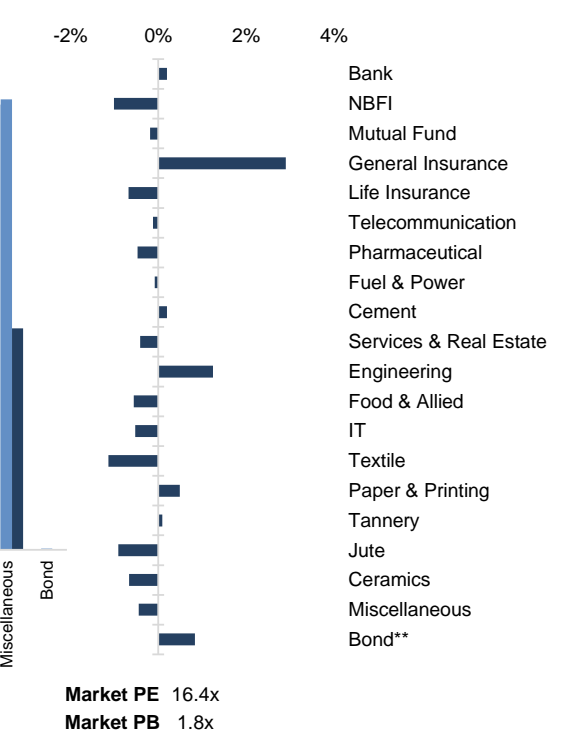


Figure: Sectorial Mcap Change



Market PE 16.4x
Market PB 1.8x

| | |
|---|---|
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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 | 1,504 | 1,501 | +3.02 | +0.20% | 33 | 691,191 | 14.5% | 404.5 | 7.9% | 7.8x | 0.8x | GP | 441,683 | 9.3% | 20.3 | 12.9x | 8.9x |
| NBFI | 2,046 | 2,067 | -20.85 | -1.01% | 23 | 201,340 | 4.2% | 528.3 | 10.3% | NM | 3.6x | WALTONHIL | 343,581 | 7.2% | 12.6 | 24.0x | 3.5x |
| Mutual Fund | 892 | 894 | -1.68 | -0.19% | 36 | 39,481 | 0.8% | 57.8 | 1.1% | NM | 0.8x | BATBC | 315,684 | 6.6% | 42.4 | 21.1x | 8.6x |
| General Insurance | 3,896 | 3,786 | +110.05 | +2.91% | 40 | 114,464 | 2.4% | 482.3 | 9.4% | 18.1x | 1.9x | SQURPHARMA | 199,895 | 4.2% | 152.4 | 11.2x | 2.1x |
| Life Insurance | 2,509 | 2,526 | -17.12 | -0.68% | 13 | 70,476 | 1.5% | 89.3 | 1.7% | NM | NM | ROBI | 171,804 | 3.6% | 17.4 | 96.5x | 2.6x |
| Telecommunication | 5,515 | 5,522 | -6.57 | -0.12% | 3 | 650,195 | 13.7% | 67.0 | 1.3% | 17.0x | 5.1x | UPGDCL | 147,532 | 3.1% | 9.0 | 12.0x | 5.0x |
| Pharmaceutical | 3,907 | 3,926 | -18.55 | -0.47% | 32 | 733,453 | 15.4% | 656.9 | 12.8% | 18.3x | 2.7x | RENATA | 145,868 | 3.1% | 14.8 | 27.0x | 5.4x |
| Fuel & Power | 1,824 | 1,825 | -1.48 | -0.08% | 23 | 475,846 | 10.0% | 287.9 | 5.6% | 11.6x | 1.2x | BEXIMCO | 129,082 | 2.7% | 281.4 | 10.3x | 1.8x |
| Cement | 2,745 | 2,739 | +5.51 | +0.20% | 7 | 134,396 | 2.8% | 86.4 | 1.7% | 20.3x | 2.8x | LHBL | 90,471 | 1.9% | 78.0 | 23.3x | 4.6x |
| Services & Real Estate | 1,441 | 1,447 | -5.96 | -0.41% | 8 | 54,771 | 1.2% | 104.7 | 2.0% | NM | 1.1x | ICB | 82,113 | 1.7% | 6.2 | 42.6x | 1.8x |
| Engineering | 4,876 | 4,815 | +60.07 | +1.25% | 42 | 569,546 | 12.0% | 447.5 | 8.7% | 19.4x | 2.0x | BERGERPBL | 81,648 | 1.7% | 1.4 | 27.0x | 7.4x |
| Food & Allied | 23,418 | 23,550 | -131.22 | -0.56% | 21 | 416,331 | 8.8% | 256.3 | 5.0% | 25.7x | 9.0x | MARICO | 74,296 | 1.6% | 9.9 | 21.6x | 28.7x |
| IT | 2,974 | 2,990 | -15.58 | -0.52% | 11 | 37,637 | 0.8% | 278.5 | 5.4% | 30.2x | 2.6x | BXPBARMA | 74,099 | 1.6% | 22.9 | 12.2x | 1.9x |
| Textile | 1,558 | 1,576 | -17.92 | -1.14% | 58 | 168,325 | 3.5% | 523.7 | 10.2% | 28.5x | 1.0x | BEACONPHAR | 64,703 | 1.4% | 53.5 | 55.2x | 11.5x |
| Paper & Printing | 9,590 | 9,543 | +46.71 | +0.49% | 6 | 34,315 | 0.7% | 149.8 | 2.9% | NM | 2.4x | BRACBANK | 64,458 | 1.4% | 23.0 | 11.8x | 1.1x |
| Tannery | 3,682 | 3,678 | +3.35 | +0.09% | 6 | 39,299 | 0.8% | 58.2 | 1.1% | NM | 3.9x | ISLAMIBANK | 52,969 | 1.1% | 8.3 | 9.9x | 0.8x |
| Jute | 8,512 | 8,590 | -77.81 | -0.91% | 3 | 1,959 | 0.0% | 2.8 | 0.1% | NM | 29.7x | POWERGRID | 42,692 | 0.9% | 35.3 | 12.3x | 0.5x |
| Ceramics | 655 | 659 | -4.39 | -0.67% | 5 | 29,499 | 0.6% | 30.8 | 0.6% | 28.1x | 1.9x | SUMITPOWER | 41,540 | 0.9% | 14.1 | 8.7x | 1.2x |
| Miscellaneous | 4,666 | 4,687 | -20.69 | -0.44% | 15 | 259,142 | 5.5% | 613.4 | 12.0% | 14.4x | 2.3x | DUTCHBANGL | 41,366 | 0.9% | 3.4 | 7.4x | 1.1x |
| Bond** | 89 | 88 | +0.74 | +0.84% | 8 | 33,219 | 0.7% | 0.6 | 0.0% | NM | NM | TITASGAS | 38,580 | 0.8% | 11.3 | 11.3x | 0.5x |

| 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 |
|-----------------|-------------------|-------|-------------------|-------|-------|----------------------------|--------------------------|----------------------------|-------|-------|-------------------|-------------------|-------|-------------------|-------|------|
| UNITEDINS | 52.2 | +7.9% | 2.8 | 31.6x | 1.4x | SQURPHARMA | 130,791 | 7.3% | 11.2x | 2.1x | IPDC | 53.3 | -2.6% | 339.0 | 22.0x | 3.0x |
| IMAMBUTTON | 50.0 | +7.3% | 5.1 | NM | 10.4x | BEXIMCO | 86,033 | 4.8% | 10.3x | 1.8x | BEXIMCO | 147.3 | -0.8% | 281.4 | 10.3x | 1.8x |
| PROVATIINS | 109.1 | +6.2% | 103.7 | 25.2x | 5.2x | BATBC | 83,498 | 4.7% | 21.1x | 8.6x | ORIONPHARM | 101.7 | -1.1% | 223.0 | 25.4x | 1.3x |
| ASIAPACINS | 59.5 | +6.1% | 10.7 | 25.3x | 2.6x | RENATA | 71,082 | 4.0% | 27.0x | 5.4x | BSC | 119.9 | +0.8% | 220.6 | 10.6x | 1.7x |
| AGRANINS | 50.1 | +5.7% | 14.3 | 20.6x | 2.8x | BXPBARMA | 51,736 | 2.9% | 12.2x | 1.9x | SQURPHARMA | 225.5 | +0.1% | 152.4 | 11.2x | 2.1x |
| INDEXAGRO | 106.2 | +5.5% | 10.0 | 21.6x | 1.7x | BEACONPHAR | 45,292 | 2.5% | 55.2x | 11.5x | GENEXIL | 107.2 | +0.3% | 118.2 | 28.1x | 5.4x |
| ICBAMCL2ND | 8.7 | +4.8% | 6.0 | NM | 1.4x | GP | 44,168 | 2.5% | 12.9x | 8.9x | PROVATIINS | 109.1 | +6.2% | 103.7 | 25.2x | 5.2x |
| RELIANCINS | 70.7 | +4.7% | 4.8 | 12.6x | 1.1x | BRACBANK | 34,652 | 1.9% | 11.8x | 1.1x | DOREENPWR | 78.8 | +0.8% | 86.5 | 7.8x | 1.5x |
| EASTERNINS | 75.1 | +4.6% | 17.5 | 15.4x | 1.5x | LHBL | 31,954 | 1.8% | 23.3x | 4.6x | BDCOM | 36.1 | -3.0% | 85.1 | 25.9x | 2.4x |
| GLOBALINS | 45.7 | +4.3% | 7.7 | 24.9x | 3.5x | ISLAMIBANK | 25,785 | 1.4% | 9.9x | 0.8x | LHBL | 77.9 | -0.1% | 78.0 | 23.3x | 4.6x |

| Top Ten Losers | Close Price (BDT) | Δ% | Turnover (BDT Mn) | PE | PB | Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|----------------|-------------------|-------|-------------------|-------|-------|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| MONOSPOOL | 202.1 | -5.0% | 11.4 | NM | 5.0x | GPHISPAT | 58.0 | 53.6 | 3.0 | 8,799 | 471.96 |
| GEMINISEA | 438.7 | -5.0% | 57.1 | 34.4x | 72.5x | IPDC | 55.0 | 52.0 | 10.0 | 2,823 | 150.26 |
| JHRML | 67.3 | -4.9% | 74.2 | NM | 2.3x | PRAGATIINS | 76.5 | 76.5 | 1.0 | 520 | 39.78 |
| PAPERPROC | 234.7 | -4.7% | 31.1 | 90.8x | 8.1x | AL-HAJTEX | 112.0 | 104.9 | 3.0 | 175 | 18.90 |
| BIFC | 7.1 | -4.1% | 0.1 | NM | NM | NRBCBANK | 26.1 | 26.1 | 2.0 | 620 | 16.18 |
| GBBPOWER | 25.8 | -3.7% | 56.4 | 19.5x | 1.3x | DELTALIFE | 155.0 | 155.0 | 1.0 | 100 | 15.50 |
| HWAWELLTEX | 45.2 | -3.6% | 0.2 | 11.1x | 1.4x | SQURPHARMA | 225.5 | 225.3 | 3.0 | 55 | 12.40 |
| VFSTDL | 24.0 | -3.6% | 37.1 | 15.7x | 1.3x | GENEXIL | 117.4 | 110.0 | 2.0 | 106 | 11.68 |
| OIMEX | 18.9 | -3.6% | 2.5 | NM | 1.5x | REPUBLIC | 48.8 | 48.8 | 1.0 | 200 | 9.76 |
| BEACONPHAR | 280.1 | -3.4% | 53.5 | 55.2x | 11.5x | CITYBANK | 26.6 | 26.6 | 3.0 | 358 | 9.53 |

*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 |
|--------------|---------------------|---------------------|-------------------|-----------------|--------------|
| GPHISPAT | 58.0 | 53.6 | 472.0 | 8,799 | 3 |
| IPDC | 55.0 | 52.0 | 150.3 | 2,823 | 10 |
| PRAGATIINS | 76.5 | 76.5 | 39.8 | 520 | 1 |
| AL-HAJTEX | 112.0 | 104.9 | 18.9 | 175 | 3 |
| NRBCBANK | 26.1 | 26.1 | 16.2 | 620 | 2 |
| DELTALIFE | 155.0 | 155.0 | 15.5 | 100 | 1 |
| SQRPHARMA | 225.5 | 225.3 | 12.4 | 55 | 3 |
| GENEXIL | 117.4 | 110.0 | 11.7 | 106 | 2 |
| REPUBLIC | 48.8 | 48.8 | 9.8 | 200 | 1 |
| CITYBANK | 26.6 | 26.6 | 9.5 | 358 | 3 |
| HRTEX | 74.5 | 74.0 | 7.8 | 105 | 4 |
| RDFOOD | 62.0 | 56.0 | 6.3 | 110 | 3 |
| VFSTDL | 26.1 | 26.1 | 5.2 | 201 | 1 |
| SAIFPOWER | 38.5 | 38.5 | 4.2 | 110 | 1 |
| BDCOM | 40.9 | 40.9 | 4.1 | 100 | 1 |
| GP | 325.5 | 325.5 | 3.3 | 10 | 2 |
| ROBI | 34.5 | 34.5 | 2.8 | 80 | 1 |
| AGNISYSL | 26.5 | 26.5 | 1.9 | 70 | 1 |
| BRACBANK | 46.5 | 45.9 | 1.7 | 36 | 3 |
| ORIONPHARM | 106.0 | 99.0 | 1.6 | 16 | 3 |
| ASIAINS | 77.0 | 77.0 | 1.3 | 17 | 2 |
| KTL | 36.0 | 36.0 | 1.3 | 36 | 1 |
| Total | | | 803.5 | | 61 |

Upcoming Corporate Events

| DSE Ticker | Right Share | Dividend | | Event | Date |
|---|-------------|----------|-------|-------------|-----------|
| | | Stock | Cash | | |
| Paramount Insurance Company Ltd. | - | 0.0% | 10.0% | Record Date | 28-Apr-22 |
| The City Bank Ltd. | - | 12.5% | 12.5% | Record Date | 5-May-22 |
| Pubali Bank Ltd. | - | 0.0% | 12.5% | Record Date | 8-May-22 |
| LankaBangla Finance Ltd. | - | 0.0% | 10.0% | Record Date | 9-May-22 |
| Pragati Insurance Ltd | - | 0.0% | 35.0% | Record Date | 10-May-22 |
| ICB Islamic Bank Limited | - | 0.0% | 0.0% | Record Date | 11-May-22 |
| NRB Commercial Bank Limited | - | 7.5% | 7.5% | Record Date | 11-May-22 |
| Mercantile Insurance Co. Ltd. | - | 0.0% | 10.0% | Record Date | 17-May-22 |
| First Security Islami Bank Limited | - | 5.0% | 5.0% | Record Date | 19-May-22 |
| Sena Kalyan Insurance Company Limited | - | 0.0% | 12.0% | Record Date | 22-May-22 |
| Dhaka Insurance Limited | - | 0.0% | 25.0% | Record Date | 22-May-22 |
| Continental Insurance Ltd. | - | 0.0% | 12.0% | Record Date | 24-May-22 |
| Peoples Insurance Company Ltd. | - | 0.0% | 12.5% | Record Date | 25-May-22 |
| Asia Pacific General Insurance Co. Ltd. | - | 0.0% | 18.0% | Record Date | 26-May-22 |
| Takaful Islami Insurance Limited | - | 0.0% | 11.0% | Record Date | 31-May-22 |
| National Credit and Commerce Bank Ltd. | - | 4.0% | 12.0% | Record Date | 8-Jun-22 |

Important DSE News
NITOLINS

(Q1 Un-audited): EPS was Tk. 0.65 for January-March 2022 as against Tk. 0.64 for January-March 2021. NOCFPS was Tk. 0.34 for January-March 2022 as against Tk. (0.99) for January-March 2021. NAV per share was Tk. 29.81 as on March 31, 2022 and Tk. 27.87 as on March 31, 2021.

MERCANBANK

(Q1 Un-audited): Consolidated EPS was Tk. 0.86 for January-March 2022 as against Tk. 0.61 (Restated) for January-March 2021. Consolidated NOCFPS was Tk. 1.21 for January-March 2022 as against Tk. 4.92 for January-March 2021. Consolidated NAV per share was Tk. 24.86 as on March 31, 2022 and Tk. 22.58 as on June 30, 2021.

ADNTEL

(Q3 Un-audited): EPS was Tk. 0.54 for January-March 2022 as against Tk. 0.56 for January-March 2021; EPS was Tk. 1.77 for July 2021-March 2022 as against Tk. 1.76 for July 2020-March 2021. NOCFPS was Tk. 1.40 for July 2021-March 2022 as against Tk. 1.22 for July 2020-March 2021. NAV per share was Tk. 26.73 as on March 31, 2022 and Tk. 25.97 as on June 30, 2021.

AZIZPIPES

(Q3 Un-audited): EPS was Tk.(1.39) for January-March 2022 as against Tk. (0.37) for January-March 2021; EPS was Tk. (3.38) for July 2021-March 2022 as against Tk. (0.47) for July 2020-March 2021. NOCFPS was Tk. (0.27) for July 2021-March 2022 as against Tk. 0.17 for July 2020-March 2021. NAV per share was Tk. (18.44) as on March 31, 2022 and Tk. (15.09) as on June 30, 2021.

PRIMEBANK

(Q1 Un-audited): Consolidated EPS was Tk. 0.92 for January-March 2022 as against Tk. 1.34 for January-March 2021. Consolidated NOCFPS was Tk. (4.43) for January-March 2022 as against Tk. 1.89 for January-March 2021. Consolidated NAV per share was Tk. 27.36 as on March 31, 2022 and Tk. 26.35 as on March 31, 2021. The Company has also informed that Net Operating Cash Flow (NOCFPS) has been decreased due to decrease in borrowings and purchases of govt. securities.

TUNGHAI

(Q3 Un-audited): EPS was Tk. (0.05) for January-March 2022 as against Tk. (0.06) for January-March 2021; EPS was Tk. (0.21) for July 2021-March 2022 as against Tk. (0.22) for July 2020-March 2021. NOCFPS was Tk. (0.023) for July 2021-March 2022 as against Tk. (0.012) for July 2020-March 2021. NAV per share was Tk. (5.96) as on March 31, 2022 and Tk. (5.76) as on June 30, 2021.

ZEALBANGLA

(Q3 Un-audited): EPS was Tk. (9.44) for Jan.-March 2022 as against Tk. (10.27) for Jan.-March 2021; EPS was Tk. (46.49) for July 2021-March 2022 as against Tk. (47.08) for July 2020-March 2021. NOCFPS was Tk. (45.34) for July 2021-March 2022 as against Tk. (45.90) for July 2020-March 2021. NAV per share was Tk. (863.92) as on March 31, 2022 and Tk. (817.43) as on June 30, 2021.

BARKAPOWER

Mr. Md. Ahsanul Kabir, one of the Directors of the company, has expressed his intention to sell 5,00,000 shares out of his holding 52,12,948 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within April 28, 2022.

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