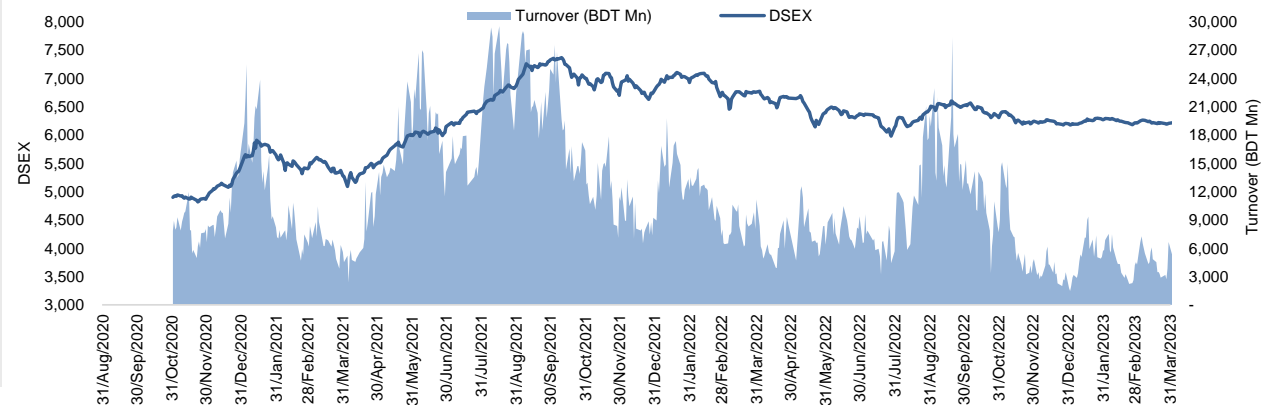


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.02%) gained 1.05 points and closed at 6,216.23. The blue-chip index DS30 (-0.10%), the Shariah-based index DSES (+0.01%), and the large-cap index CDSET (-0.03%) closed at 2,199.67, 1,347.69, and 1,209.31 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.22% followed by Fuel & Power (+0.03%), Food & Allied (+0.03%), Engineering (+0.01%). Bank experienced the highest loss of 0.15% followed by NBFI (0.00%), NBFI (0.00%). Block trades contributed 7.5% of the overall market turnover. Gemini Sea Food Ltd. (+7.5%) was the most traded share with a turnover of BDT 335 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,216.23	6,215.18	+1.05	+0.02%	+0.2%
DS30	2,199.67	2,201.93	-2.26	-0.10%	+0.2%
DSES	1,347.69	1,347.52	+0.17	+0.01%	-0.8%
CDSET	1,209.31	1,209.70	-0.39	-0.03%	-0.4%

	Advanced	Declined	Unchanged	Total
All Category	53	62	210	325
A Category (Equity)	32	40	149	221
B Category (Equity)	19	15	54	88
N Category (Equity)	0	2	3	5
Z Category (Equity)	2	5	4	11
Mutual Funds	0	1	21	22
Corporate Bonds	1	0	4	5
Treasury Bonds	3	0	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,633,186	7,630,260	+0.0%
	Mn USD	71,338	71,311	
Turnover	Mn BDT	4,729	4,141	+14.2%
	Mn USD	44	39	
Volume	Mn Shares	84	59	+41.7%
No. of Trade		91,997	86,279	+6.6%

* Average Interbank Exchange Rate is BDT 107.00 as of Apr 13, 2023

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Figure: Sectorial Turnover (BDT Mn)

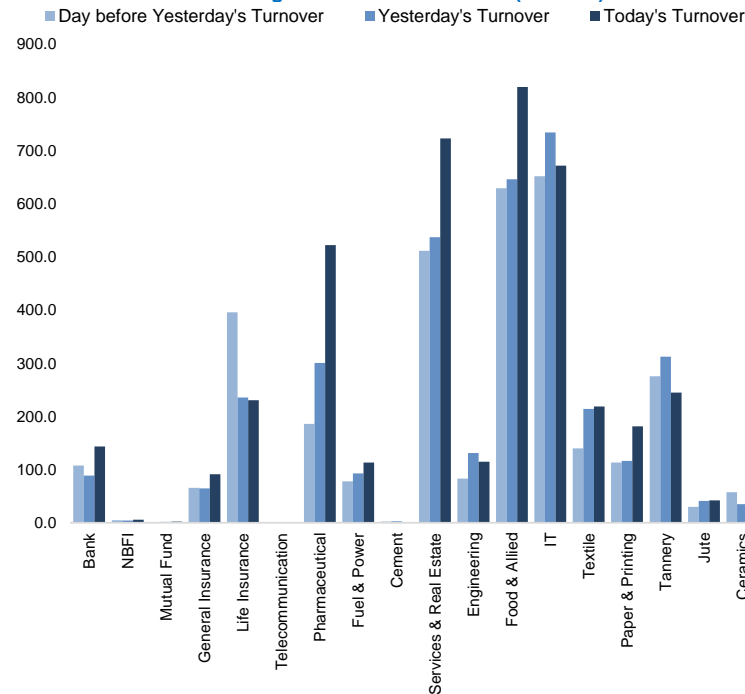
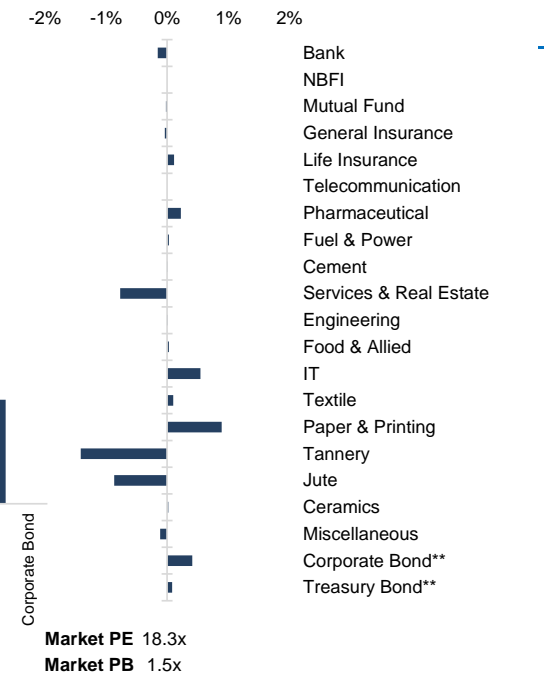


Figure: Sectorial Mcap Change



Market PE 18.3x
 Market PB 1.5x

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	1,436	1,439	-2.18	-0.15%	35	677,538	9.0%	143.2	3.3%	7.7x	0.7x	GP	386,996	8.6%	0.4	12.9x	8.4x
NBFI	1,916	1,916	-	-	23	186,922	2.5%	5.7	0.1%	NM	4.3x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	825	826	-0.15	-0.02%	37	37,324	0.5%	2.1	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.5	15.7x	6.8x
General Insurance	3,049	3,051	-1.20	-0.04%	42	89,001	1.2%	91.2	2.1%	15.2x	1.4x	SQURPHARM	185,977	4.1%	1.5	9.7x	1.8x
Life Insurance	2,525	2,522	+2.84	+0.11%	14	70,799	0.9%	230.7	5.3%	NM	NM	ROBI	157,138	3.5%	0.0	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.5	0.0%	16.8x	4.7x	RENATA	139,689	3.1%	0.0	31.1x	4.7x
Pharmaceutical	3,674	3,666	+8.18	+0.22%	34	712,759	9.5%	522.2	11.9%	18.4x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,697	1,696	+0.50	+0.03%	23	447,523	6.0%	113.0	2.6%	17.9x	1.1x	BEXIMCO	103,571	2.3%	0.1	9.0x	1.2x
Cement	2,310	2,310	+0.12	+0.01%	7	110,947	1.5%	1.2	0.0%	57.9x	2.6x	BERGERPBL	80,674	1.8%	2.3	27.3x	6.7x
Services & Real Esta	2,276	2,293	-17.55	-0.77%	8	89,902	1.2%	722.6	16.5%	38.2x	1.2x	MARICO	76,277	1.7%	3.5	20.7x	28.6x
Engineering	4,471	4,471	+0.53	+0.01%	42	524,761	7.0%	115.0	2.6%	56.0x	2.1x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,221	21,215	+6.02	+0.03%	21	392,679	5.2%	819.3	18.7%	20.3x	8.2x	BXPHARMA	65,222	1.5%	0.2	14.1x	1.6x
IT	3,351	3,333	+18.11	+0.54%	11	43,684	0.6%	671.5	15.4%	32.5x	3.0x	BRACBANK	57,619	1.3%	2.1	9.6x	0.9x
Textile	1,583	1,582	+1.62	+0.10%	58	166,867	2.2%	218.9	5.0%	44.5x	1.1x	BEACONPHAR	56,595	1.3%	2.0	60.3x	9.2x
Paper & Printing	10,368	10,276	+91.51	+0.89%	6	39,946	0.5%	181.3	4.1%	39.4x	2.0x	ISLAMIBANK	52,647	1.2%	0.2	10.7x	0.8x
Tannery	3,217	3,263	-46.05	-1.41%	6	33,975	0.5%	244.6	5.6%	45.5x	3.3x	DUTCHBANGL	43,554	1.0%	0.4	7.4x	1.1x
Jute	13,199	13,314	-115.16	-0.86%	3	3,229	0.0%	42.2	1.0%	NM	5.1x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	684	684	+0.14	+0.02%	5	31,632	0.4%	18.0	0.4%	41.4x	1.9x	UNILEVERCL	38,551	0.9%	0.3	52.8x	22.9x
Miscellaneous	4,091	4,096	-4.64	-0.11%	14	222,760	3.0%	195.9	4.5%	13.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	89	88	+0.36	+0.41%	9	36,540	0.5%	1.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	10.7x	0.9x
Treasury Bond**	94	94	+0.08	+0.08%	252	2,996,501	40.0%	32.2	0.7%	NM	NM						

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
NAVANAPHAR	73.0	+9.9%	103.3	18.5x	1.8x	SQURPHARMA	121,499	7.1%	9.7x	1.8x	GEMINISEA	756.2	+7.5%	335.1	53.9x	44.0x
ORIONINFU	365.9	+8.7%	280.1	NM	27.4x	BATBC	74,086	4.3%	15.7x	6.8x	UNIQUEHRL	75.5	+1.5%	303.1	16.8x	0.9x
NTC	645.1	+7.5%	6.7	NM	13.0x	BEXIMCO	69,196	4.1%	9.0x	1.2x	AAMRANET	80.6	+3.9%	288.6	25.3x	2.1x
GEMINISEA	756.2	+7.5%	335.1	53.9x	44.0x	RENATA	68,042	4.0%	31.1x	4.7x	ORIONINFU	365.9	+8.7%	280.1	NM	27.4x
METROSPIN	37.3	+6.6%	85.9	38.2x	1.8x	BEACONPHAR	48,413	2.8%	60.3x	9.2x	EHL	116.5	-3.3%	240.4	18.3x	1.5x
BDAUTOCA	155.8	+6.0%	40.7	NM	21.5x	BXPHARMA	45,564	2.7%	14.1x	1.6x	GENEXIL	95.7	-0.2%	196.5	28.9x	5.2x
EMERALDOIL	38.8	+5.4%	31.3	NM	NM	GP	38,700	2.3%	12.9x	8.4x	RDFOOD	48.6	+1.0%	181.0	42.2x	3.1x
NFML	15.5	+4.0%	13.0	96.7x	1.3x	BRACBANK	30,976	1.8%	9.6x	0.9x	SEAPEARL	276.5	-2.2%	155.2	67.1x	19.5x
HFL	18.2	+4.0%	16.8	21.9x	0.5x	LHBL	26,980	1.6%	16.9x	4.2x	BSC	125.3	-2.0%	146.2	8.4x	1.6x
AAMRANET	80.6	+3.9%	288.6	25.3x	2.1x	ISLAMIBANK	24,166	1.4%	10.7x	0.8x	APEXFOOT	357.0	-2.8%	142.6	28.8x	1.5x
						NBL	19,116	1.1%	NM	0.6x						
						PUBALIBANK	18,525	1.1%	4.8x	0.6x						
						CITYBANK	18,211	1.1%	5.5x	0.8x						
						SEAPEARL	18,067	1.1%	67.1x	19.5x						
						OLYMPIC	17,642	1.0%	21.1x	3.4x						
						ROBI	15,714	0.9%	85.7x	2.4x						
						ALARABANK	14,483	0.9%	14.6x	1.1x						
						BSRMLTD	14,210	0.8%	NM	0.7x						
						PRIMEBANK	13,766	0.8%	5.8x	0.7x						
						UPGDCL	13,547	0.8%	15.4x	4.7x						

* 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

Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
NBL	8.0	8.0	128.0	15,995	5
SEAPPEARL	280.0	259.0	38.3	143	6
SQURPHARMA	202.5	200.0	19.2	95	31
NPOLYMER	56.1	48.5	18.0	346	5
SILVAPHL	23.7	21.6	16.0	725	6
METROSPIN	36.5	34.0	12.0	342	5
AOL	37.4	33.8	11.2	319	7
AAMRANET	78.0	74.0	10.7	141	5
SONALIPAPR	645.0	585.0	9.5	16	16
BANKASIA	20.2	20.2	8.1	400	1
COPPERTECH	40.5	33.3	7.7	195	2
MARICO	2,305.0	2,301.5	6.7	3	4
SUNLIFEINS	62.0	62.0	6.2	100	1
HRTEX	115.9	107.2	6.2	54	4
SAIHAMTEX	17.8	17.0	4.9	276	2
GEMINISEA	756.2	660.0	3.6	5	5
AL-HAJTEX	178.0	152.0	3.3	21	4
RDFOOD	48.3	48.2	3.2	67	2
GP	272.1	261.6	3.1	12	4
BATBC	479.8	479.8	2.9	6	2
RUPALILIFE	95.0	95.0	2.9	30	1
BEXIMCO	104.7	104.1	2.6	25	2
Total			356.8		163

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
PHENIXINS		0.0%	15%	Record Date	17-Apr-23
PRIMELIFE		0.0%	2%	Record Date	17-Apr-23
DBH		2.0%	15%	Record Date	18-Apr-23
UTTARABANK		14.0%	14%	Record Date	26-Apr-23
PIONEERINS		5.0%	25%	Record Date	27-Apr-23
SHAHJABANK		3.0%	12%	Record Date	27-Apr-23
PRIMEBANK		0.0%	18%	Record Date	30-Apr-23
IDLC		0.0%	15%	Record Date	2-May-23
PARAMOUNT		0.0%	10%	Record Date	3-May-23
EBL		12.5%	13%	Record Date	3-May-23
BRACBANK		7.5%	8%	Record Date	9-May-23
PRAGATIINS		5.0%	25%	Record Date	10-May-23
CITYBANK		2.0%	10%	Record Date	10-May-23
RINGSHINE		0.0%	0%	Record Date	10-May-23
ICBIBANK		0.0%	0%	Record Date	11-May-23
PUBALIBANK		0.0%	13%	Record Date	11-May-23
EASTLAND		0.0%	10%	Record Date	14-May-23

Important DSE News
BATASHOE

The Board of Directors has recommended 105% final cash dividend (Total 365% Cash Dividend for the year ended December 31, 2022 inclusive of 260% Interim Cash Dividend, which has already been paid) for the year ended December 31, 2022. Date of AGM: 13.07.2023, Time: 11:00 AM, Venue: Digital Platform. Record date: 18.05.2023. The Company has also reported EPS of Tk. 29.98, NAV per share of Tk. 252.16 and NOCFPS of Tk. 107.84 for the year ended December 31, 2022 as against Tk. (5.01), Tk. 252.33 and Tk. 91.70 respectively for the year ended December 31, 2021.

PEOPLESINS

The Board of Directors has recommended 10.50% Cash Dividend for the year ended December 31, 2022. Date of AGM: 21.06.2023, Time: 11:30 AM, Venue: Digital Platform through the link <http://peoplesinsurance.bdvirtualagm.com>. Record Date: 24.05.2023. The Company has also reported EPS of Tk. 2.61, NAV per share of Tk. 31.44 and NOCFPS of Tk. 3.49 for the year ended December 31, 2022 as against Tk. 2.58, Tk. 30.08 and Tk. 4.66 respectively for the year ended December 31, 2021.

(Q1 Un-audited): EPS was Tk. 0.52 for January-March 2023 as against Tk. 0.58 for January-March 2022. NOCFPS was Tk. 0.03 for January-March 2023 as against Tk. 1.23 for January-March 2022. NAV per share was Tk. 31.97 as on March 31, 2023 and Tk. 30.66 as on March 31, 2022. Reasons for significant deviation in EPS and NOCFPS: EPS and NOCFPS have been decreased due to increase in management expenses, claims, re-issuance payment and other payable.

TAKAFULINS

The Board of Directors has recommended 12% Cash Dividend for the year ended December 31, 2022. Date of AGM: 17.06.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 18.05.2023. The Company has also reported EPS of Tk. 1.49, NAV per share of Tk. 18.92 and NOCFPS of Tk. 2.10 for the year ended December 31, 2022 as against Tk. 2.25, Tk. 19.15 and Tk. 3.13 respectively for the year ended December 31, 2021.

(Q1 Un-audited): EPS was Tk. 0.37 for January-March 2023 as against Tk. 0.36 for January-March 2022. NOCFPS was Tk. 0.39 for January-March 2023 as against Tk. 0.42 for January-March 2022. NAV per share was Tk. 19.32 as on March 31, 2023 and Tk. 18.94 as on December 31, 2022.

PUBALIBANK

The Board of Directors has recommended 12.50% Cash Dividend for the year ended December 31, 2022. Date of AGM: 06.06.2023, Time: 10:30 AM, Venue: Hybrid system: Physical Location at Pubali Bank Auditorium, Head Office, 26 Dilkusha C/A, Dhaka and virtually by using digital platform. Record Date: 11.05.2023. The Company has also reported Consolidated EPS of Tk. 5.49, Consolidated NAV per share of Tk. 41.96 and Consolidated NOCFPS of Tk. (3.36) for the year ended December 31, 2022 as against Tk. 4.23, Tk. 38.98 (restated) and Tk. 3.28 respectively for the year ended December 31, 2021.

VFSTDL

(Q3 Un-audited): EPS was Tk. 0.14 for January-March 2023 as against Tk. 0.51 for January-March 2022; EPS was Tk. 0.54 for July 2022-March 2023 as against Tk. 1.40 for July 2021-March 2022. NOCFPS was Tk. 0.92 for July 2022-March 2023 as against Tk. 1.87 for July 2021-March 2022. NAV per share was Tk. 19.91 as on March 31, 2023 and Tk. 19.36 as on June 30, 2022.

ICBIBANK

(Q1 Un-audited): EPS was Tk. (0.16) for January-March 2023 as against Tk. (0.13) for January-March 2022. NOCFPS was Tk. 0.27 for January-March 2023 as against Tk. (0.29) for January-March 2022. NAV per share was Tk. (18.67) as on March 31, 2023 and Tk. (18.27) as on March 31, 2022.

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NAVANAPHAR

(Q3 Un-audited): EPS was Tk. 1.09 for Jan-March 2023 as against Tk. 0.85 for Jan-March 2022; EPS was Tk. 2.57 for July 2022-March 2023 as against Tk. 2.39 for July 2021-March 2022. NOCFPS was Tk. 2.85 for July 2022-March 2023 as against Tk. 2.13 for July 2021-March 2022. NAV per share was Tk. 40.90 as on March 31, 2023 and Tk. 43.41 as on March 31, 2022.

ZEALBANGLA

(Q3 Un-audited): EPS was Tk. (19.62) for Jan-March 2023 as against Tk. (9.44) for Jan-March 2022; EPS was Tk. (52.47) for July 2022-March 2023 as against Tk. (46.49) for July 2021-March 2022. NOCFPS was Tk. (56.67) for July 2022-March 2023 as against Tk. (45.34) for July 2021-March 2022. NAV per share was Tk. (956.84) as on March 31, 2023 and Tk. (905.70) as on June 30, 2022.

COPPERTECH

(Q3 Un-audited): EPS was Tk. 0.47 for January-March 2023 as against Tk. 0.68 for January-March 2022; EPS was Tk. 0.69 for July 2022-March 2023 as against Tk. 1.49 for July 2021-March 2022. NOCFPS was Tk. 0.57 for July 2022-March 2023 as against Tk. 2.89 for July 2021-March 2022. NAV per share was Tk. 13.28 as on March 31, 2023 and Tk. 13.37 as on June 30, 2022.

RDFOOD

Concrete and Steel Technologies Ltd., a Corporate Director of the Company, has expressed its intention to buy 10,00,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange Limited within April 30, 2023.

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