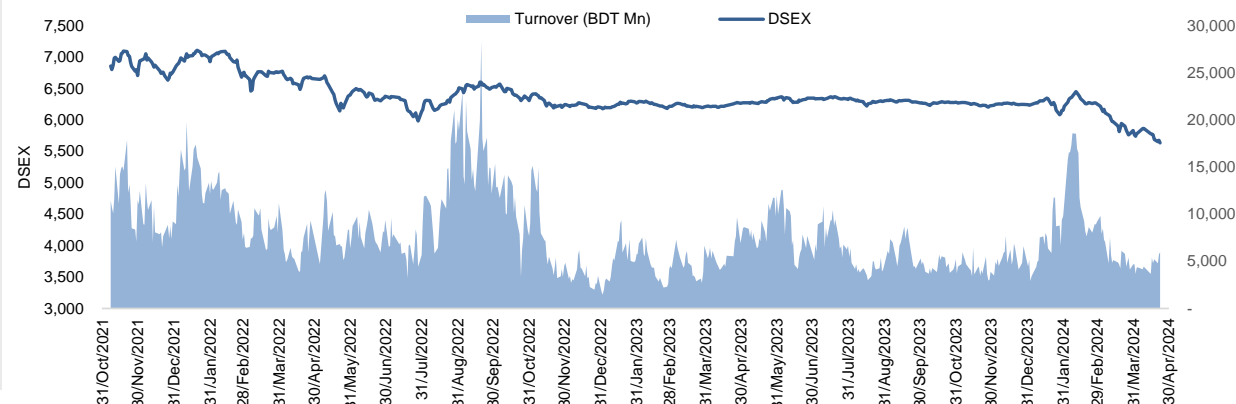


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.73%) lost 41.26 points and closed at 5,633.61. The blue-chip index DS30 (-0.18%), the Shariah-based index DSES (-0.59%), and the large-cap index CDSET (-0.39%) closed at 1,980.43, 1,235.73, and 1,070.37 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.07% followed by Food & Allied (-0.92%), Fuel & Power (-0.49%), Engineering (-0.39%), Bank (-0.34%), Telecommunication (-0.29%), and Pharmaceutical (-0.15%), respectively. Block trades contributed 4.2% of the overall market turnover. Asiatic Laboratories Limited (+6.1%) was the most traded share with a turnover of BDT 399 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,633.61	5,674.87	-41.26	-0.73%	-9.8%
DS30	1,980.43	1,983.91	-3.48	-0.18%	-5.4%
DSES	1,235.73	1,243.09	-7.36	-0.59%	-9.4%
CDSET	1,070.37	1,074.54	-4.17	-0.39%	-11.0%

	Advanced	Declined	Unchanged	Total
All Category	50	310	36	396
A Category (Equity)	33	177	24	234
B Category (Equity)	13	87	5	105
N Category (Equity)	1	2	1	4
Z Category (Equity)	3	44	6	53
Mutual Funds	2	27	8	37
Corporate Bonds	2	0	1	3
Treasury Bonds	1	0	0	1

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,035,351	7,067,162	-0.5%
	Mn USD	63,958	64,247	
Turnover	Mn BDT	5,976	5,749	+3.9%
	Mn USD	54	52	
Volume	Mn Shares	183	176	+3.8%
No. of Trade		167,188	137,913	+21.2%

* Average Interbank Exchange Rate is BDT 110.00 as of Apr 23, 2024

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Figure: Sectorial Turnover (BDT Mn)

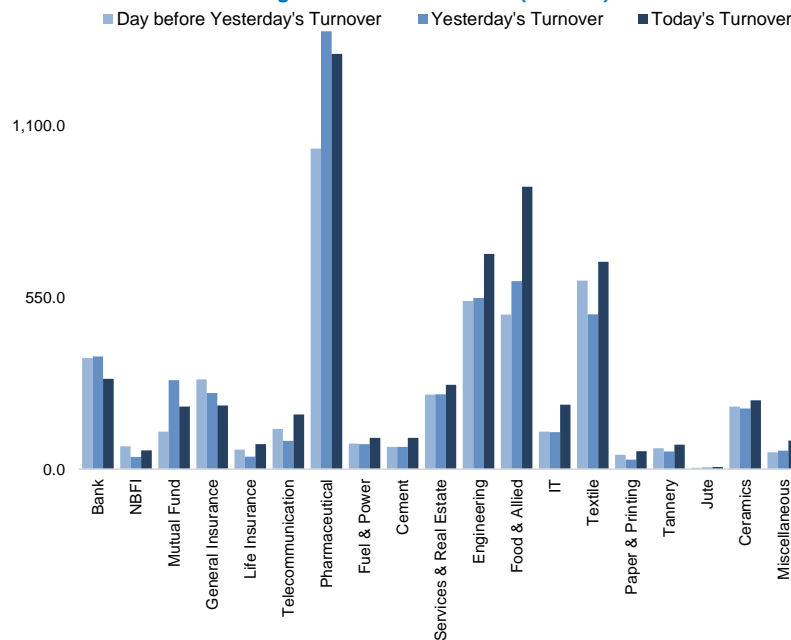
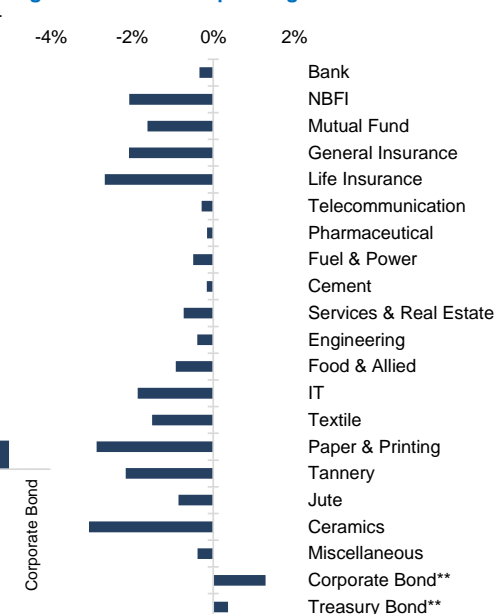


Figure: Sectorial Mcap Change



Market PE 15.5x

Market PB 1.3x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

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	1,389	1,394	-4.75	-0.34%	36	657,612	9.8%	289.4	5.1%	10.6x	0.7x	GP	314,080	8.2%	8.5	9.5x	4.7x
NBFI	1,165	1,189	-24.68	-2.07%	23	112,752	1.7%	59.8	1.0%	NM	NM	BATBC	208,332	5.5%	37.6	11.7x	3.9x
Mutual Fund	706	718	-11.65	-1.62%	37	32,994	0.5%	200.2	3.5%	NM	0.6x	WALTONHIL	197,206	5.2%	6.3	17.8x	1.8x
General Insurance	3,311	3,381	-70.35	-2.08%	43	95,902	1.4%	203.8	3.6%	17.6x	1.5x	SQURPHARMA	188,548	4.9%	56.3	9.6x	1.6x
Life Insurance	1,990	2,045	-54.68	-2.67%	15	52,905	0.8%	80.6	1.4%	NM	NM	ROBI	137,758	3.6%	161.0	43.1x	2.0x
Telecommunication	4,086	4,098	-11.78	-0.29%	3	473,094	7.1%	174.8	3.1%	12.3x	3.2x	BEXIMCO	103,842	2.7%	0.0	NM	1.2x
Pharmaceutical	3,288	3,293	-4.90	-0.15%	33	627,576	9.4%	1,328.3	23.2%	17.1x	1.9x	RENATA	90,255	2.4%	5.0	42.6x	2.8x
Fuel & Power	1,264	1,270	-6.25	-0.49%	23	332,839	5.0%	100.5	1.8%	24.2x	0.8x	BERGERPBL	81,120	2.1%	2.9	24.9x	6.0x
Cement	2,387	2,391	-3.72	-0.16%	7	114,000	1.7%	99.9	1.7%	15.9x	2.4x	UPGDCL	77,331	2.0%	5.5	11.3x	2.5x
Services & Real Estate	1,665	1,678	-12.28	-0.73%	9	92,080	1.4%	269.9	4.7%	23.3x	0.7x	MARICO	76,539	2.0%	2.0	17.0x	10.6x
Engineering	3,203	3,216	-12.55	-0.39%	42	370,057	5.5%	688.8	12.0%	16.8x	1.2x	BRACBANK	60,975	1.6%	22.7	8.0x	0.9x
Food & Allied	17,344	17,506	-161.91	-0.92%	21	318,433	4.8%	903.8	15.8%	16.5x	5.2x	BXPHARMA	53,087	1.4%	14.8	10.8x	1.2x
IT	2,751	2,803	-52.16	-1.86%	11	36,187	0.5%	206.8	3.6%	30.1x	2.4x	ISLAMIBANK	52,486	1.4%	0.0	8.5x	0.7x
Textile	1,295	1,315	-19.84	-1.51%	58	134,395	2.0%	663.7	11.6%	NM	0.9x	BEACONPHAR	44,883	1.2%	47.9	67.9x	7.1x
Paper & Printing	8,344	8,591	-247.47	-2.88%	6	38,280	0.6%	57.9	1.0%	56.1x	1.9x	ICB	44,664	1.2%	0.2	NM	1.0x
Tannery	2,521	2,577	-55.65	-2.16%	6	27,616	0.4%	78.2	1.4%	36.4x	2.5x	DUTCHBANGL	43,754	1.1%	8.4	5.5x	0.9x
Jute	17,331	17,480	-149.89	-0.86%	3	4,061	0.1%	6.7	0.1%	NM	NM	POWERGRID	39,385	1.0%	8.5	NM	0.3x
Ceramics	574	592	-18.15	-3.07%	5	25,473	0.4%	220.2	3.8%	38.5x	1.5x	BESTHLDNG	38,874	1.0%	189.0	29.5x	0.7x
Miscellaneous	4,363	4,380	-16.91	-0.39%	15	237,719	3.6%	91.8	1.6%	38.6x	1.9x	UNILEVERCL	37,178	1.0%	2.0	38.7x	15.8x
Corporate Bond**	4,625	4,566	+59.02	+1.29%	16	42,934	0.6%	0.6	0.0%	NM	NM	EBL	35,583	0.9%	4.2	5.8x	0.9x
Treasury Bond**	77	77	+0.28	+0.36%	238	2,869,078	42.8%	1.1	0.0%	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
BDTHAIFOOD	35.9	+9.8%	71.6	NM	2.5x	SQURPHARMA	121,789	7.0%	9.6x	1.6x	ASIATICLAB	55.7	+6.1%	398.7	29.4x	1.1x
ORIONINFU	568.2	+7.5%	245.1	NM	39.1x	BATBC	74,086	4.3%	11.7x	3.9x	LOVELLO	69.4	+6.9%	339.8	64.3x	5.3x
LOVELLO	69.4	+6.9%	339.8	64.3x	5.3x	BEXIMCO	69,196	4.0%	NM	1.2x	GOLDENSON	23.2	+0.4%	283.5	NM	1.2x
ASIATICLAB	55.7	+6.1%	398.7	29.4x	1.1x	RENATA	68,042	3.9%	42.6x	2.8x	ORIONINFU	568.2	+7.5%	245.1	NM	39.1x
MALEKSPIN	37.6	+5.9%	183.1	16.7x	0.7x	BXPHARMA	45,564	2.6%	10.8x	1.2x	BESTHLDNG	36.7	-	189.0	29.5x	0.7x
1STPRIMFMF	40.6	+4.6%	97.8	NM	3.8x	GP	38,700	2.2%	9.5x	4.7x	MALEKSPIN	37.6	+5.9%	183.1	16.7x	0.7x
SALVOCHEM	57.0	+4.2%	131.8	31.7x	4x	BEACONPHAR	34,036	2.0%	67.9x	7.1x	AIL	121.0	-3.2%	173.9	57.6x	5.0x
PHARMAID	699.6	+4.2%	39.4	91.9x	6.9x	ISLAMIBANK	33,649	1.9%	8.5x	0.7x	ROBI	26.3	-0.4%	161.0	43.1x	2.0x
AFTABAUTO	44.0	+4.0%	93.6	NM	0.9x	BRACBANK	30,964	1.8%	8.0x	0.9x	FUWANGFOOC	29.8	-2.0%	145.0	NM	12.4x
EGEN	34.8	+3.9%	29.4	23.8x	1.5x	LHBL	28,853	1.7%	12.8x	3.4x	CENTRALPHL	24.4	-5.1%	136.5	NM	4.5x

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)
OAL	13.0	-9.1%	30.3	NM	1.2x	MTB	15.5	15.5	3.0	6,000	93.00
KPPL	21.5	-8.5%	22.9	NM	NM	LOVELLO	67.8	62.0	16.0	719	46.64
MONNOFABR	20.9	-7.5%	53.8	NM	0.8x	BEACHHATCH	74.8	63.0	8.0	519	34.22
MEGCONMILK	23.7	-7.4%	1.0	NM	NM	EHL	82.7	82.7	1.0	94	7.80
ADNTEL	100.9	-6.7%	21.5	NM	3.3x	SPCL	65.5	65.5	1.0	105	6.85
ZAHINTEX	5.7	-6.6%	0.4	NM	0.8x	EXIMBANK	11.3	10.6	5.0	529	5.65
PHOENIXFIN	7.4	-6.3%	0.8	NM	NM	BEACONPHAR	217.0	217.0	1.0	17	3.73
DACCADYE	9.0	-6.3%	1.2	NM	0.3x	BDTHAIFOOD	31.0	31.0	3.0	120	3.72
ALLTEX	12.1	-6.2%	1.1	NM	2.4x	ACMEPL	23.4	22.9	3.0	156	3.62
AMANFEED	26.0	-6.1%	4.8	NM	0.9x	1STPRIMFMF	41.9	38.2	2.0	80	3.28

* 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	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MTB	15.5	15.5	93.0	6,000	3
LOVELLO	67.8	62.0	46.6	719	16
BEACHHATCH	74.8	63.0	34.2	519	8
EHL	82.7	82.7	7.8	94	1
SPCL	65.5	65.5	6.8	105	1
EXIMBANK	11.3	10.6	5.7	529	5
BEACONPHAR	217.0	217.0	3.7	17	1
BDTHAIFOOD	31.0	31.0	3.7	120	3
ACMEPL	23.4	22.9	3.6	156	3
1STPRIMFMF	41.9	38.2	3.3	80	2
EIL	38.1	38.1	3.2	85	1
ORIONINFU	564.0	525.0	3.1	6	2
BPML	61.5	61.5	2.5	40	1
ANWARGALV	155.9	155.9	2.3	15	1
GEMINISEA	315.0	315.0	2.2	7	1
PEOPLESINS	39.9	39.9	2.0	50	1
PREMIERCEM	57.5	57.5	2.0	34	1
POPULARLIF	60.3	60.3	1.9	32	2
INDEXAGRO	69.3	69.3	1.7	25	1
ETL	15.0	14.0	1.7	118	2
SIMTEX	24.0	20.9	1.6	70	2
ISLAMIINS	44.6	44.6	1.6	35	1
Total			248.9		79

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
CITYBANK		10.0%	15%	Record Date	24-Apr-24
AGRANINS		0.0%	12%	Record Date	24-Apr-24
IPDC		5.0%	5%	Record Date	24-Apr-24
RECKITBEN		0.0%	550%	Record Date	25-Apr-24
CENTRALINS		0.0%	12%	Record Date	30-Apr-24
PARAMOUNT		0.0%	10%	Record Date	6-May-24
BRACBANK		10.0%	10%	Record Date	7-May-24
UTTARABANK		12.5%	18%	Record Date	7-May-24
PRIMEBANK		0.0%	18%	Record Date	7-May-24
MERCANBANK		0.0%	10%	Record Date	8-May-24
SHAHJABANK		0.0%	14%	Record Date	8-May-24
ICBIBANK		0.0%	0%	Record Date	9-May-24
MTB		0.0%	10%	Record Date	9-May-24
DUTCHBANGL		17.5%	18%	Record Date	9-May-24
PUBALIBANK		12.5%	13%	Record Date	12-May-24

Important DSE News

MEGHNAINS

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2023. Date of AGM: 19.06.2024, Time: 11:30 AM, Venue: Hybrid Platform (Physical venue: Golf Garden, Army Golf Club, Dhaka Cantonment, Dhaka. Web Link: <https://micl28.agm.watch>). Record Date: 30.05.2024. The Company has reported EPS of Tk. 1.29, NAV per share of Tk. 14.60 and NOCFPS of Tk. (0.03) for the year ended December 31, 2023 as against Tk. 1.32, Tk. 17.21 and Tk. (1.33) respectively for the year ended December 31, 2022.

ROBI

(Q1 Un-audited): Consolidated EPS was Tk. 0.20 for January-March 2024 as against Tk. 0.08 for January-March 2023; Consolidated NOCFPS was Tk. 1.74 for January-March 2024 as against Tk. 1.83 for January-March 2023. Consolidated NAV per share was Tk. 12.96 as on March 31, 2024 and Tk. 12.90 as on March 31, 2023.

EXIMBANK

The Board of Directors has recommended 10.00% cash dividend for all shareholders for the year ended on 31-Dec-2023. Date of AGM: 24-Jun-2024, Time: 11:00 AM, Venue: Digital Platform. Record Date: 26-May-2024. The Company has also reported Consolidated EPS of Tk. 2.33, Consolidated NAV per share of Tk. 23.00 and Consolidated NOCFPS of Tk. 5.94 for the year ended on 31-Dec-2023 as against Consolidated Tk. 2.57, Consolidated Tk. 22.02 and Consolidated Tk. (13.20) respectively for the same period of the previous year.

AMANFEED

(Q3 Un-audited): EPS was Tk. (0.11) for January-March 2024 as against Tk. (0.33) for January-March 2023; EPS was Tk. 0.39 for July 2023-March 2024 as against Tk. 0.05 for July 2022-March 2023. NOCFPS was Tk. 0.53 for July 2023-March 2024 as against Tk. 0.48 for July 2022-March 2023. NAV per share was Tk. 28.39 as on March 31, 2024 and Tk. 28.37 as on June 30, 2023. Reasons for deviation in EPS and NOCFPS: EPS for the 3rd quarter ended March 31, 2024 is Tk. (0.11) per share comparing Tk. (0.33) per share for the 3rd quarter ended March 31, 2023 increasing by 66.67% due to slight decrease price of raw materials and some of the selling and distribution expenses.

NITOLINS

The Company has informed that the Board of Directors has appointed Mr. Mahbub Alam, Assistant Managing Director as Company Secretary (Current Charge) until further appointment of a new Company Secretary.

EASTRNLAB

The company has informed that Mr. Md. Amin Ul Ahsan, Chairman, BPC (Secretary to Govt.) has been appointed as the Chairman of the Board of Directors of the Company with effect from 22.04.2024.

IPDC

The Company has informed that Mr. Rizwan Dawood Shams has been appointed as the Managing Director of the Company with effect from April 15, 2024.

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