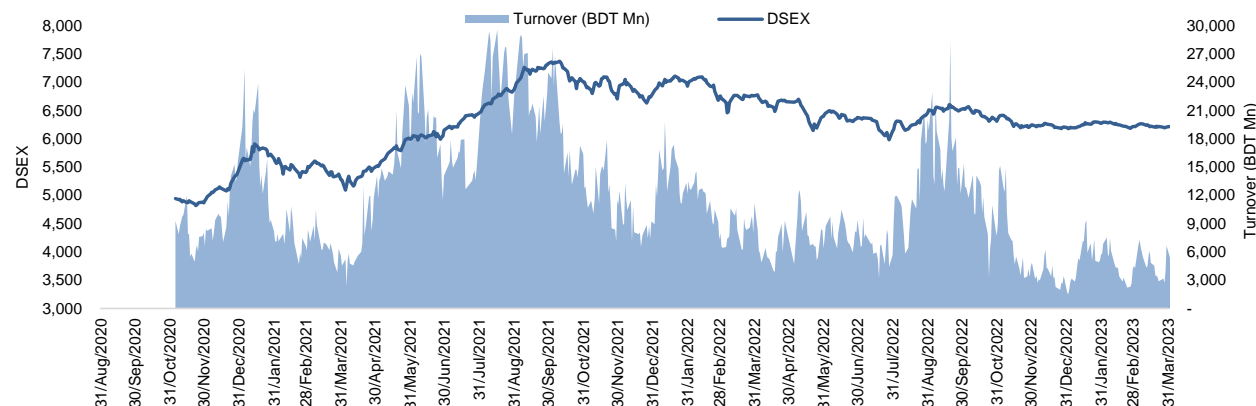


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.18%) gained 11.36 points and closed at 6,263.52. The blue-chip index DS30 (-0.01%), the Shariah-based index DSES (+0.26%), and the large-cap index CDSET (+0.03%) closed at 2,212.93, 1,358.53, and 1,210.77 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.14% followed by Engineering (+0.14%), Bank (+0.06%), Food & Allied (+0.06%), Fuel & Power (+0.04%), NBFI (+0.02%), and Telecommunication (0.00%), respectively. Block trades contributed 6.1% of the overall market turnover. Unique Hotel & Resorts Limited (-1.4%) was the most traded share with a turnover of BDT 464 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,263.52	6,252.16	+11.36	+0.18%	+0.9%
DS30	2,212.93	2,213.04	-0.11	-0.01%	+0.8%
DSES	1,358.53	1,354.99	+3.53	+0.26%	-0.0%
CDSET	1,210.77	1,210.41	+0.36	+0.03%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	83	54	206	343
A Category (Equity)	47	39	145	231
B Category (Equity)	30	12	51	93
N Category (Equity)	2	1	2	5
Z Category (Equity)	4	2	8	14
Mutual Funds	1	0	19	20
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,656,753	7,655,168	+0.0%
	Mn USD	71,558	71,544	
Turnover	Mn BDT	7,132	5,525	+29.1%
	Mn USD	67	52	
Volume	Mn Shares	105	75	+39.9%
No. of Trade		145,783	114,803	+27.0%

\* Average Interbank Exchange Rate is BDT 107.00 as of Apr 24, 2023

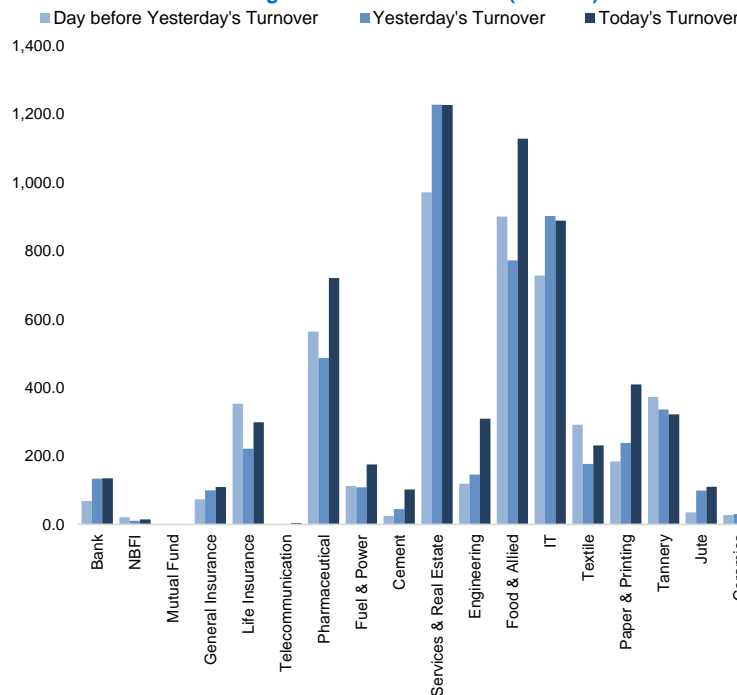
**Fahim Hassan**  
 Research Analyst

(880) 1709636546  
 fahim.hassan@bracepl.com

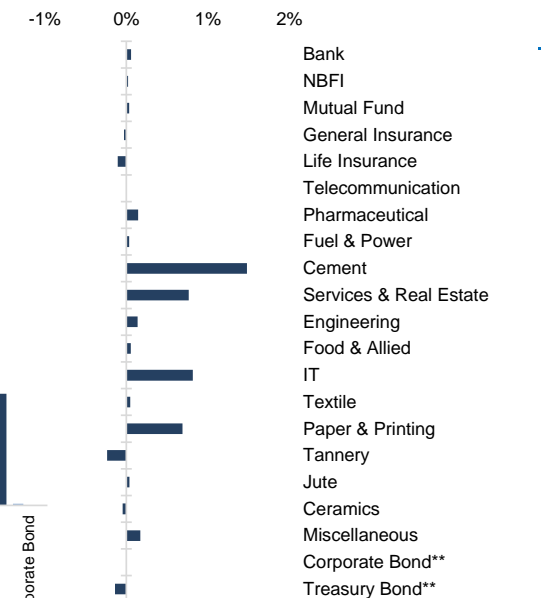
**Md. Tanvir Ahmed**  
 Research Associate

(880) 1708805201  
 mtanvir.ahmed@bracepl.com

**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	1,439	1,438	+0.83	+0.06%	35	678,585	9.0%	134.7	2.0%	7.6x	0.7x	GP	386,996	8.6%	3.5	12.9x	8.4x
NBFI	1,915	1,914	+0.42	+0.02%	23	186,784	2.5%	14.7	0.2%	NM	4.3x	WALTONHIL	317,378	7.0%	0.1	40.4x	3.2x
Mutual Fund	826	825	+0.30	+0.04%	37	37,338	0.5%	1.0	0.0%	NM	0.7x	BATBC	280,098	6.2%	1.1	15.7x	6.8x
General Insurance	3,071	3,071	-0.85	-0.03%	42	89,620	1.2%	109.1	1.6%	15.2x	1.4x	SQURPHARM	185,977	4.1%	8.8	9.7x	1.8x
Life Insurance	2,568	2,570	-2.68	-0.10%	14	72,009	1.0%	298.9	4.5%	NM	NM	ROBI	157,138	3.5%	0.3	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	3.9	0.1%	16.8x	4.7x	RENATA	139,689	3.1%	0.2	31.1x	4.7x
Pharmaceutical	3,692	3,686	+5.32	+0.14%	34	716,095	9.5%	720.9	10.8%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,697	1,696	+0.59	+0.04%	23	447,609	6.0%	175.6	2.6%	17.9x	1.1x	BEXIMCO	103,571	2.3%	0.1	9.0x	1.2x
Cement	2,373	2,338	+34.64	+1.48%	7	113,979	1.5%	102.4	1.5%	59.5x	2.6x	BERGERPBL	81,398	1.8%	3.9	27.6x	6.8x
Services & Real Esta	2,426	2,407	+18.43	+0.77%	8	95,833	1.3%	1,227.1	18.3%	45.7x	1.3x	MARICO	76,277	1.7%	0.8	20.7x	28.6x
Engineering	4,481	4,474	+6.21	+0.14%	42	525,866	7.0%	308.8	4.6%	56.2x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,422	21,410	+12.06	+0.06%	21	396,387	5.3%	1,128.3	16.9%	20.5x	8.3x	BXPHARMA	65,222	1.4%	0.3	14.1x	1.6x
IT	3,399	3,371	+27.48	+0.82%	11	44,309	0.6%	888.8	13.3%	33.0x	3.0x	BRACBANK	57,619	1.3%	0.4	9.6x	0.9x
Textile	1,591	1,590	+0.76	+0.05%	58	167,672	2.2%	231.3	3.5%	44.7x	1.1x	BEACONPHAR	57,219	1.3%	30.9	61.0x	9.3x
Paper & Printing	10,612	10,539	+72.51	+0.69%	6	40,885	0.5%	409.3	6.1%	40.4x	2.1x	ISLAMIBANK	53,130	1.2%	1.3	10.8x	0.8x
Tannery	3,270	3,278	-7.73	-0.24%	6	34,534	0.5%	322.1	4.8%	46.2x	3.4x	DUTCHBANGL	43,554	1.0%	6.8	7.7x	1.0x
Jute	14,236	14,231	+5.35	+0.04%	3	3,483	0.0%	109.9	1.6%	NM	5.4x	TITASGAS	40,459	0.9%	0.1	13.2x	0.5x
Ceramics	684	684	-0.31	-0.05%	5	31,640	0.4%	181.1	2.7%	41.4x	1.9x	UNILEVERCL	38,551	0.9%	0.5	52.8x	22.9x
Miscellaneous	4,120	4,113	+7.00	+0.17%	14	224,337	3.0%	326.9	4.9%	13.3x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,393	0.5%	0.1	0.0%	NM	NM	SEAPEARL	36,648	0.8%	284.6	73.7x	17.6x
Treasury Bond**	94	94	-0.13	-0.14%	252	2,994,631	39.8%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
HEIDELCEM	216.7	+10.0%	11.4	NM	3.6x
EMERALDOIL	47.6	+9.9%	88.1	NM	NM
ARAMITCEM	24.5	+9.9%	14.2	NM	5.0x
BDTHAI	14.6	+9.8%	27.6	NM	0.5x
APEXFOODS	332.8	+8.7%	185.3	43.7x	2.6x
BEACHHATCH	41.0	+8.5%	63.5	51.3x	4.0x
MIDLANDBNK	11.8	+8.3%	35.8	30.4x	1x
PREMIERCEM	50.8	+7.6%	56.8	NM	0.8x
SHURWID	14.8	+6.5%	16.7	NM	1.2x
EASTRNLUB	1,820.0	+6.2%	34.3	NM	10.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LEGACYFOOT	73.1	-4.9%	65.9	NM	8.1x
PRIMELIFE	62.1	-4.8%	29.2	NM	NM
BANGAS	117.7	-3.6%	8.0	NM	5.6x
AZIZPIPES	90.3	-3.0%	9.4	NM	NM
AL-HAJTEX	161.5	-2.9%	30.7	NM	17.1x
BDTHAIFOOD	38.8	-2.8%	34.9	82.6x	2.7x
SAMATALETH	64.2	-2.7%	11.7	NM	4.5x
AAMRATECH	42.8	-2.3%	57.7	38.0x	1.8x
FINEFOODS	74.7	-2.2%	38.5	NM	7.1x
JHRML	80.8	-2.2%	112.2	24.0x	2.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.1%	9.7x	1.8x
BATBC	74,086	4.3%	15.7x	6.8x
BEXIMCO	69,196	4.1%	9.0x	1.2x
RENATA	68,042	4.0%	31.1x	4.7x
BEACONPHAR	48,413	2.8%	61.0x	9.3x
BXPHARMA	45,564	2.7%	14.1x	1.6x
GP	38,700	2.3%	12.9x	8.4x
BRACBANK	30,976	1.8%	9.6x	0.9x
LHBL	26,980	1.6%	16.9x	4.2x
ISLAMIBANK	24,166	1.4%	10.8x	0.8x
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%	73.7x	17.6x
OLYMPIC	17,642	1.0%	22.1x	3.6x
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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
UNIQUEHRL	82.1	-1.4%	464.3	18.3x	1.0x
GENEXIL	97.6	+3.5%	369.3	29.5x	5.1x
EHL	118.6	+4.6%	340.9	18.6x	1.5x
SEAPEARL	303.5	+0.6%	284.6	73.7x	17.6x
GEMINISEA	855.9	+5.6%	266.6	61.0x	33.7x
ORIONINFU	365.6	-1.4%	261.7	NM	27.3x
AAMRANET	83.1	-1.8%	255.1	26.0x	2.2x
APEXFOOT	398.5	+2.0%	236.9	32.1x	1.7x
OLYMPIC	169.8	-1.5%	212.6	22.1x	3.6x
RDFOOD	51.0	+3.0%	195.2	44.3x	3.2x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPEARL	307.0	283.1	13.0	254	72.81
GEMINISEA	859.0	751.0	16.0	74	60.06
IPDC	60.0	60.0	1.0	900	54.00
SONALIPAPR	660.0	593.1	13.0	87	52.41
AAMRANET	83.5	76.9	12.0	334	26.52
SQURPHARMA	205.0	202.5	24.0	116	23.60
BANKASIA	20.2	20.2	2.0	650	13.13
FORTUNE	75.8	68.3	4.0	145	10.66
BXPHARMA	145.0	138.0	9.0	73	10.52
UNIQUEHRL	84.0	76.2	5.0	132	10.21

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPPEARL	307.0	283.1	72.8	254	13
GEMINISEA	859.0	751.0	60.1	74	16
IPDC	60.0	60.0	54.0	900	1
SONALIPAPR	660.0	593.1	52.4	87	13
AAMRANET	83.5	76.9	26.5	334	12
SQURPHARMA	205.0	202.5	23.6	116	24
BANKASIA	20.2	20.2	13.1	650	2
FORTUNE	75.8	68.3	10.7	145	4
BXPHARMA	145.0	138.0	10.5	73	9
UNIQUEHRL	84.0	76.2	10.2	132	5
ACMELAB	82.8	80.5	8.1	99	10
APEXFOOT	382.1	382.1	7.6	20	2
HRTEX	110.0	106.5	6.7	62	11
METROSPIN	42.1	38.7	6.6	168	5
SILVAPHL	21.6	19.5	5.6	267	8
BEXIMCO	104.7	104.1	4.2	41	5
ORIONPHARM	79.0	74.0	4.2	54	5
AOL	32.9	32.9	4.0	121	2
NPOLYMER	45.9	45.9	3.7	81	2
RDFOOD	54.0	48.7	3.7	74	3
BATBC	479.8	479.8	3.3	7	5
MALEKSPIN	24.4	24.4	2.7	111	3
<b>Total</b>			<b>436.8</b>		<b>222</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
CRYSTALINS		0.0%	10%	Record Date	14-May-23
ISLAMIINS		0.0%	13%	Record Date	15-May-23
NHFIL		0.0%	15%	Record Date	15-May-23

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#### Important DSE News

##### DOREENPWR

**(Q3 Un-audited):** Consolidated EPS was Tk. 1.03 for January-March 2023 as against Tk. 3.02 (restated) for January-March 2022; Consolidated EPS was Tk. 1.79 for July 2022-March 2023 as against Tk. 7.36 (restated) for July 2021-March 2022. Consolidated NOCFPS was Tk. 6.44 for July 2022-March 2023 as against Tk. (9.93) (restated) for July 2021-March 2022. Consolidated NAV per share with revaluation was Tk. 48.71 as on March 31, 2023 and Tk. 47.46 (restated) as on June 30, 2022.

##### SINGERBD

The company has informed that the Board of Directors has approved the appointment of Mr. Ozkan Cimen as Director of the company with effect from April 18, 2023. The Board of Directors has also approved the resignation of Director, Mr. Polat Sen, and Independent Director, Mr. Reazul Haque Chowdhury with effect from April 18, 2023.