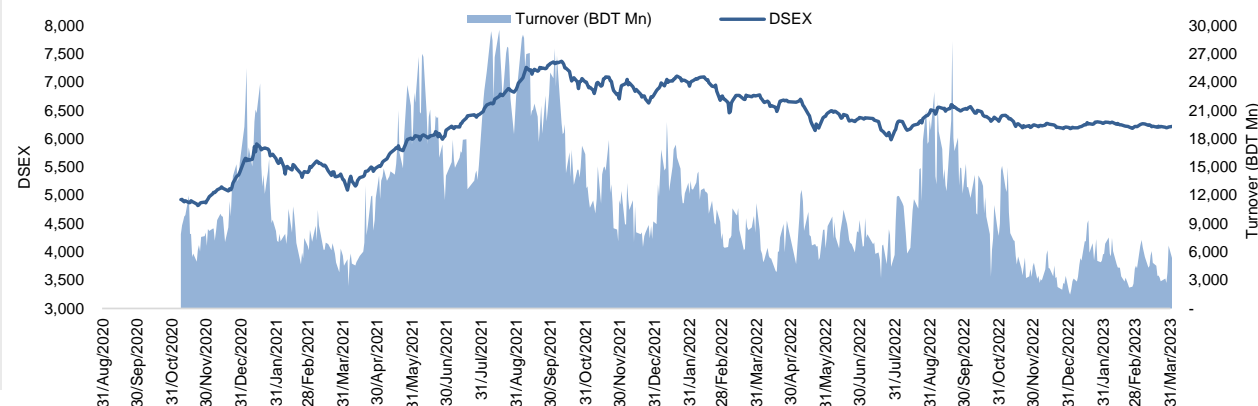


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.05%) gained 2.84 points and closed at 6,266.36. The blue-chip index DS30 (+0.01%), the Shariah-based index DSES (+0.09%), and the large-cap index CDSET (+0.03%) closed at 2,213.22, 1,359.80, and 1,211.10 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.41% followed by Bank (+0.07%), Telecommunication (0.00%). Fuel & Power experienced the highest loss of 0.05% followed by Pharmaceutical (-0.04%), NBFI (-0.02%), Engineering (0.00%). Block trades contributed 6.3% of the overall market turnover. Unique Hotel & Resorts Limited (+4.0%) was the most traded share with a turnover of BDT 612 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,266.36	6,263.52	+2.84	+0.05%	+1.0%
DS30	2,213.22	2,212.93	+0.29	+0.01%	+0.8%
DSES	1,359.80	1,358.53	+1.27	+0.09%	+0.1%
CDSET	1,211.10	1,210.77	+0.33	+0.03%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	64	75	213	352
A Category (Equity)	40	48	151	239
B Category (Equity)	19	23	52	94
N Category (Equity)	1	2	2	5
Z Category (Equity)	4	2	8	14
Mutual Funds	0	1	21	22
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,658,872	7,656,753	+0.0%
	Mn USD	71,793	71,773	
Turnover	Mn BDT	7,653	7,132	+7.3%
	Mn USD	72	67	
Volume	Mn Shares	110	105	+5.0%
No. of Trade		150,341	145,783	+3.1%

* Average Interbank Exchange Rate is BDT 106.68 as of Apr 25, 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)

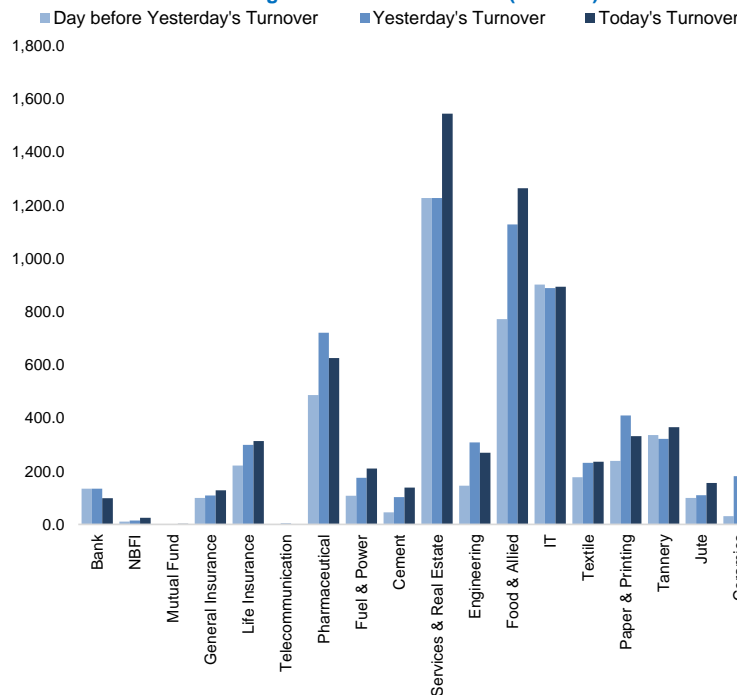
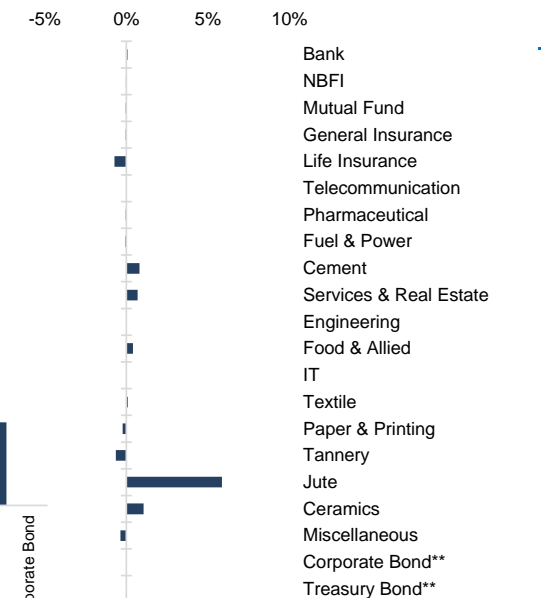


Figure: Sectorial Mcap Change



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	+1.02	+0.07%	35	679,068	9.0%	98.1	1.4%	7.6x	0.7x	GP	386,996	8.6%	0.6	12.9x	8.4x
NBFI	1,914	1,915	-0.42	-0.02%	23	186,963	2.5%	24.7	0.3%	NM	4.3x	WALTONHIL	317,378	7.0%	0.1	40.4x	3.2x
Mutual Fund	825	826	-0.30	-0.04%	37	37,324	0.5%	2.0	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.7	15.7x	6.8x
General Insurance	3,068	3,069	-1.47	-0.05%	42	89,577	1.2%	128.6	1.8%	15.3x	1.4x	SQURPHARM	185,977	4.1%	2.8	9.7x	1.8x
Life Insurance	2,549	2,568	-18.49	-0.72%	14	71,490	1.0%	313.0	4.4%	NM	NM	ROBI	157,138	3.5%	0.1	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.7	0.0%	16.8x	4.7x	RENATA	139,689	3.1%	0.1	31.1x	4.7x
Pharmaceutical	3,690	3,692	-1.44	-0.04%	34	715,815	9.5%	625.4	8.7%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.3	15.4x	4.7x
Fuel & Power	1,696	1,697	-0.91	-0.05%	23	447,368	5.9%	209.8	2.9%	17.9x	1.1x	BEXIMCO	103,571	2.3%	0.0	9.0x	1.2x
Cement	2,392	2,373	+19.09	+0.80%	7	114,896	1.5%	138.1	1.9%	60.0x	2.6x	BERGERPBL	80,600	1.8%	1.9	27.3x	6.7x
Services & Real Esta	2,442	2,426	+16.86	+0.69%	8	96,499	1.3%	1,545.1	21.5%	46.1x	1.3x	MARICO	76,277	1.7%	0.9	20.7x	28.6x
Engineering	4,480	4,481	-0.08	-0.00%	42	525,856	7.0%	269.6	3.8%	56.2x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,510	21,423	+86.99	+0.41%	21	397,997	5.3%	1,264.8	17.6%	20.6x	8.3x	BXPHARMA	65,222	1.4%	0.3	14.1x	1.6x
IT	3,399	3,399	+0.37	+0.01%	11	44,314	0.6%	893.5	12.5%	33.0x	3.0x	BRACBANK	57,619	1.3%	0.2	9.6x	0.9x
Textile	1,593	1,591	+1.55	+0.10%	58	167,836	2.2%	236.2	3.3%	44.8x	1.1x	BEACONPHAR	56,595	1.3%	8.7	60.3x	9.2x
Paper & Printing	10,587	10,612	-24.63	-0.23%	6	40,790	0.5%	331.5	4.6%	40.3x	2.0x	ISLAMIBANK	53,130	1.2%	0.8	10.8x	0.8x
Tannery	3,249	3,270	-20.94	-0.64%	6	34,313	0.5%	366.0	5.1%	46.0x	3.4x	DUTCHBANGL	43,554	1.0%	0.9	7.7x	1.0x
Jute	15,071	14,236	+834.94	+5.86%	3	3,687	0.0%	156.4	2.2%	NM	5.8x	TITASGAS	40,459	0.9%	0.1	13.2x	0.5x
Ceramics	691	684	+7.20	+1.05%	5	31,973	0.4%	255.3	3.6%	41.9x	1.9x	UNILEVERCL	38,551	0.9%	0.9	52.8x	22.9x
Miscellaneous	4,105	4,120	-14.77	-0.36%	14	223,533	3.0%	312.3	4.4%	13.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,393	0.5%	0.9	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.2	10.7x	0.9x
Treasury Bond**	94	94	-	-	252	2,994,631	39.8%	0.0	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
MEGHNA PET	30.9	+10.0%	1.1	NM	NM	SQURPHARMA	121,499	7.1%	9.7x	1.8x	UNIQUEHRL	85.4	+4.0%	611.8	19.0x	1.0x
EMERALDOIL	52.3	+9.9%	122.6	NM	NM	BATBC	74,086	4.3%	15.7x	6.8x	EHL	122.5	+3.3%	546.2	19.2x	1.6x
APEXFOODS	361.9	+8.7%	181.6	47.6x	2.9x	BEXIMCO	69,196	4.1%	9.0x	1.2x	OLYMPIC	176.8	+4.1%	370.0	23.0x	3.7x
AFTABAUTO	26.5	+8.2%	29.6	88.0x	0.5x	RENATA	68,042	4.0%	31.1x	4.7x	AAMRANET	86.6	+4.2%	331.0	27.1x	2.3x
SONALIANSH	528.9	+7.5%	154.3	NM	2.3x	BEACONPHAR	48,413	2.8%	60.3x	9.2x	APEXFOOT	380.5	-4.5%	314.2	30.6x	1.6x
HEIDELBCEM	231.7	+6.9%	68.2	NM	3.9x	BXPHARMA	45,564	2.7%	14.1x	1.6x	SEAPEARL	299.1	-1.4%	311.0	72.6x	17.3x
MONOSPOOL	328.2	+6.6%	118.8	44.0x	7x	GP	38,700	2.3%	12.9x	8.4x	GENEXIL	96.5	-1.1%	262.9	29.2x	5.0x
SPCERAMICS	45.0	+4.7%	213.2	83.3x	1.4x	BRACBANK	30,976	1.8%	9.6x	0.9x	NAVANAPHAR	84.2	+4.2%	215.6	21.3x	2.1x
AAMRANET	86.6	+4.2%	331.0	27.1x	2.3x	LHBL	26,980	1.6%	16.9x	4.2x	SPCERAMICS	45.0	+4.7%	213.2	83.3x	1.4x
NAVANAPHAR	84.2	+4.2%	215.6	21.3x	2.1x	ISLAMIBANK	24,166	1.4%	10.8x	0.8x	GEMINISEA	855.4	-0.1%	199.8	61.0x	33.7x
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)
BDLAMPS	252.2	-6.3%	80.4	33.8x	3.1x	PUBALIBANK	18,525	1.1%	4.7x	0.6x	SQURPHARMA	209.8	199.0	79.0	353	70.85
YPL	16.5	-4.6%	12.5	NM	3x	CITYBANK	18,211	1.1%	5.5x	0.8x	SEAPEARL	297.0	278.0	6.0	235	66.36
APEXFOOT	380.5	-4.5%	314.2	30.6x	1.6x	SEAPEARL	18,067	1.1%	72.6x	17.3x	OLYMPIC	17,642	1.0%	23.0x	3.7x	
KBPPWBIL	10.9	-4.4%	9.9	NM	0.9x	ROBI	15,714	0.9%	85.7x	2.4x	MHSML	25.5	25.5	1.0	1,250	31.88
BDAUTOCA	155.9	-4.1%	27.5	NM	21.6x	ALARABANK	14,483	0.9%	14.8x	1.1x	ORIONPHARM	85.0	74.3	17.0	307	24.89
NTC	687.5	-3.8%	34.9	NM	13.8x	BSRMLTD	14,210	0.8%	NM	0.7x	BDFINANCE	44.1	44.1	1.0	500	22.05
FINEFOODS	72.1	-3.5%	29.4	NM	6.9x	PRIMEBANK	13,766	0.8%	5.7x	0.7x	SOUTHEASTB	13.8	13.8	3.0	1,395	19.25
BDTHAIFOOD	37.6	-3.1%	24.3	80.0x	2.6x	UPGDCL	13,547	0.8%	15.4x	4.7x	METROSPIN	41.1	39.0	10.0	389	15.66
OIMEX	16.5	-2.9%	1.9	NM	1.5x						CITYGENINS	38.9	35.0	2.0	440	15.60
STYLECRAFT	95.1	-2.9%	16.4	NM	6.0x						AOL	36.3	32.9	3.0	470	15.56
											MARICO	2,340.0	2,301.0	13.0	6	13.62

* 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

* 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
SQURPHARMA	209.8	199.0	70.9	353	79
SEAPPEARL	297.0	278.0	66.4	235	6
MHSML	25.5	25.5	31.9	1,250	1
ORIONPHARM	85.0	74.3	24.9	307	17
BDFINANCE	44.1	44.1	22.1	500	1
SOUTHEASTB	13.8	13.8	19.3	1,395	3
METROSPIN	41.1	39.0	15.7	389	10
CITYGENINS	38.9	35.0	15.6	440	2
AOL	36.3	32.9	15.6	470	3
MARICO	2,340.0	2,301.0	13.6	6	13
HRTEX	115.0	105.0	12.6	113	7
BEACONPHAR	265.0	265.0	11.9	45	1
GEMINISEA	801.3	792.0	11.8	15	3
ZAHEENSPIN	9.9	9.0	11.7	1,200	10
BANKASIA	20.2	20.2	11.1	550	2
OLYMPIC	175.2	164.0	10.9	64	8
BSC	123.9	123.9	9.3	75	1
AAMRANET	89.9	78.2	8.3	101	7
MEGHNALIFE	77.0	77.0	8.0	104	2
GENNEXT	6.0	6.0	7.8	1,300	1
PRIMELIFE	66.0	62.0	7.4	115	2
EHL	122.6	116.0	5.7	49	3
Total			481.5		262

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
JANATAINS		0.0%	11%	Record Date	16-May-23

Important DSE News
FIRSTSBANK

The Board of Directors has recommended 10% Stock Dividend for the year ended December 31, 2022. The Stock Dividend is subject to the approval of BSEC. Date of AGM: 20.06.2023, Time: 10:00 AM, Venue: Digital Platform. Record Date: 21.05.2023. The Company has also reported Consolidated EPS of Tk. 2.81, Consolidated NAV per share of Tk. 21.32 and Consolidated NOCFPS of Tk. 4.20 for the year ended December 31, 2022 as against Tk. 3.20 (restated), Tk. 19.45 (restated) and Tk. 5.81 (restated) respectively for the year ended December 31, 2021.

(Q1 Un-audited): Consolidated EPS was Tk. 0.37 for January-March 2023 as against Tk. 0.53 (restated) for January-March 2022. Consolidated NOCFPS was Tk. (30.94) for January-March 2023 as against Tk. (4.81) (restated) for January-March 2022. Consolidated NAV per share was Tk. 21.69 as on March 31, 2023 and Tk. 19.98 (restated) as on March 31, 2022.

KARNAPHULI

The Board of Directors has recommended 10% cash dividend for the year ended December 31, 2022. Date of AGM: 27.07.2023, Time: 12:30 PM, Venue: Digital Platform. Record Date: 30.05.2023. The Company has also reported EPS of Tk. 1.86, NAV per share of Tk. 20.72 and NOCFPS of Tk. 1.45 for the year ended December 31, 2022 as against Tk. 2.37, Tk. 20.19 and Tk. 4.60 respectively for the year ended December 31, 2021.

UCB

The Board of Directors has recommended 5% Cash and 5% Stock Dividend for the year ended December 31, 2022. The Stock Dividend is subject to the approval of Regulatory Authorities. Date of AGM: 26.06.2023, Time: 3:00 PM, Venue: Digital Platform. Record date: 18.05.2023. The Company has also reported consolidated EPS of Tk. 2.35, consolidated NAV per share of Tk. 28.57 and consolidated NOCFPS of Tk. (13.25) for the year ended December 31, 2022 as against Tk. 1.78, Tk. 26.59 and Tk. (16.85) respectively for the year ended December 31, 2021.

IBNSINA

(Q3 Un-audited): Consolidated EPS was Tk. 2.99 for January-March 2023 as against Tk. 2.76 for January-March 2022; Consolidated EPS was Tk. 13.52 for July 2022-March 2023 as against Tk. 13.26 for July 2021-March 2022. Consolidated NOCFPS was Tk. 17.47 for July 2022-March 2023 as against Tk. 11.28 for July 2021-March 2022. Consolidated NAV per share was Tk. 90.82 as on March 31, 2023 and Tk. 83.36 as on June 30, 2022.

BDLAMPS

(Q3 Un-audited): EPS was Tk. (2.21) for January-March 2023 as against Tk. 1.53 (restated) for January-March 2022; EPS was Tk. 1.07 for July 2022-March 2023 as against Tk. 5.66 (restated) for July 2021-March 2022. NOCFPS was Tk. 6.39 for July 2022-March 2023 as against Tk. 4.63 (restated) for July 2021-March 2022. NAV per share was Tk. 81.25 as on March 31, 2023 and Tk. 86.38 (restated) as on March 31, 2022.

GENNEXT

A.J Corporation Limited, a Corporate Director of the Company, has expressed its intention to buy 13,00,000 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange Limited within April 30, 2023.

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