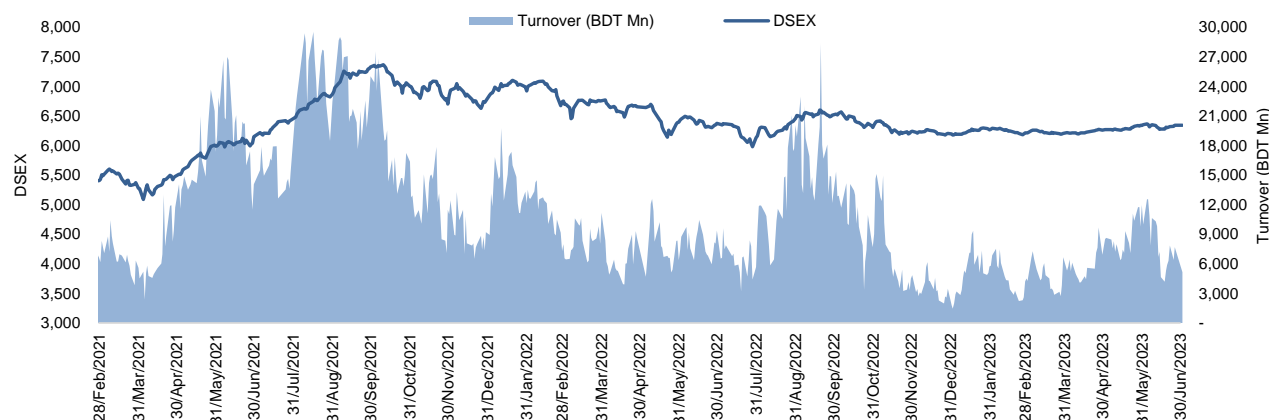


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.01%) lost 0.79 points and closed at 6,343.30. The blue-chip index DS30 (-0.04%), the Shariah-based index DSES (-0.05%), and the large-cap index CDSET (-0.14%) closed at 2,191.94, 1,376.29, and 1,211.84 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.18% followed by Food & Allied (-0.06%), Fuel & Power (-0.05%), Engineering (-0.03%), NBFI (0.00%), Telecommunication (0.00%), and Pharmaceutical (+0.05%), respectively. Block trades contributed 6.5% of the overall market turnover. Fu-Wang Ceramic Industries Ltd. (+9.8%) was the most traded share with a turnover of BDT 177 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,343.30	6,344.09	-0.79	-0.01%	+2.2%
DS30	2,191.94	2,192.82	-0.88	-0.04%	-0.2%
DSES	1,376.29	1,377.00	-0.71	-0.05%	+1.3%
CDSET	1,211.84	1,213.52	-1.68	-0.14%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	80	116	168	364
A Category (Equity)	37	75	121	233
B Category (Equity)	34	33	34	101
N Category (Equity)	1	3	1	5
Z Category (Equity)	8	5	12	25
Mutual Funds	1	4	21	26
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,718,218	7,720,780	-0.0%
	Mn USD	71,188	71,212	-0.0%
Turnover	Mn BDT	5,158	7,704	-33.1%
	Mn USD	48	71	-33.1%
Volume	Mn Shares	168	182	-7.6%
No. of Trade		138,587	153,853	-9.9%

\* Average Interbank Exchange Rate is BDT 108.42 as of Jun 26, 2023

Figure: Sectorial Turnover (BDT Mn)

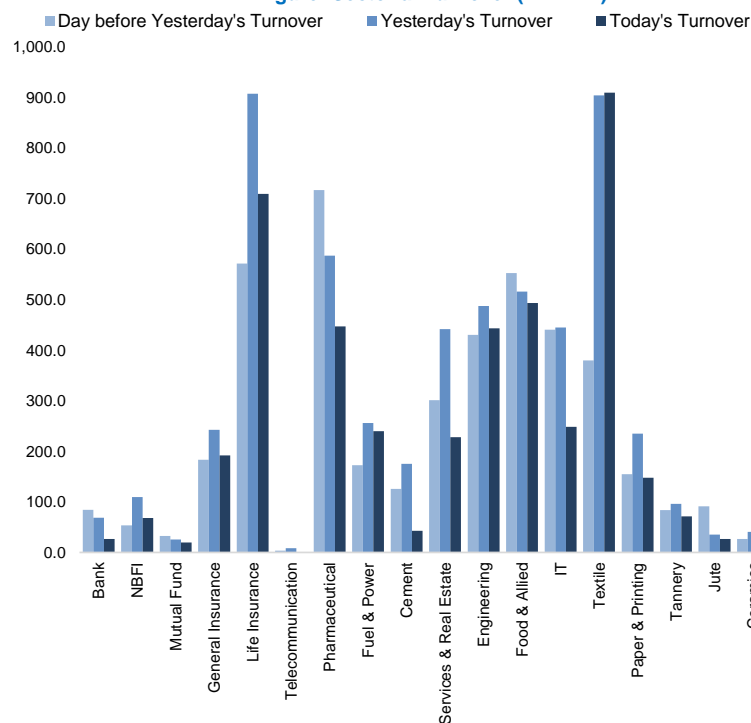
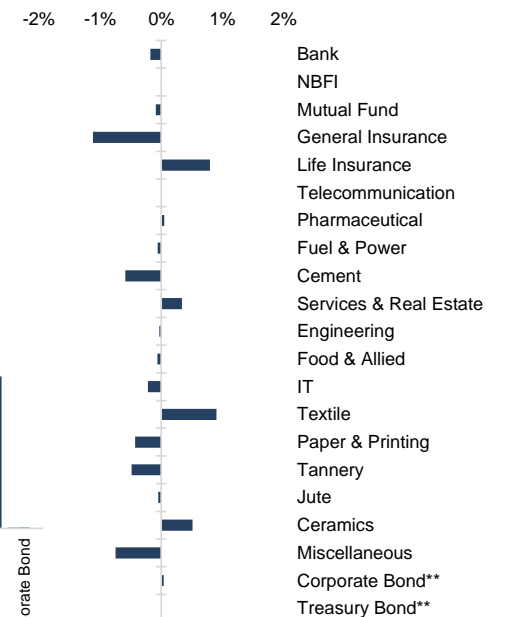


Figure: Sectorial Mcap Change



Market PE 18.4x

Market PB 1.5x

\* Market P/E calculation excludes NBL

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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	1,443	1,445	-2.53	-0.18%	35	680,171	9.0%	26.6	0.6%	11.8x	0.7x	GP	386,996	8.5%	0.5	13.0x	7.2x
NBFI	1,926	1,926	-0.10	-0.00%	23	187,406	2.5%	68.3	1.4%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	832	-0.74	-0.09%	37	37,608	0.5%	19.6	0.4%	NM	0.7x	BATBC	280,098	6.1%	0.5	15.3x	6.9x
General Insurance	3,341	3,379	-37.67	-1.11%	42	97,517	1.3%	192.0	4.0%	17.8x	1.5x	SQURPHARMA	185,977	4.1%	2.2	9.9x	1.7x
Life Insurance	3,088	3,064	+24.49	+0.80%	15	86,324	1.1%	709.1	14.7%	NM	NM	ROBI	157,138	3.4%	0.6	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.1	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,714	3,712	+1.88	+0.05%	34	720,411	9.6%	446.9	9.3%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,706	1,706	-0.93	-0.05%	23	449,873	6.0%	240.0	5.0%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.5	12.0x	1.2x
Cement	2,549	2,564	-15.03	-0.59%	7	122,439	1.6%	42.8	0.9%	31.1x	2.7x	BERGERPBL	81,820	1.8%	1.7	27.2x	6.3x
Services & Real Estate	2,028	2,021	+6.86	+0.34%	8	80,118	1.1%	228.1	4.7%	27.2x	1.0x	LHBL	80,019	1.8%	31.5	14.8x	4.0x
Engineering	4,517	4,518	-1.42	-0.03%	42	530,147	7.0%	443.4	9.2%	72.5x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,600	21,613	-12.74	-0.06%	21	399,679	5.3%	493.6	10.2%	20.1x	8.1x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,310	3,318	-7.23	-0.22%	11	43,158	0.6%	248.5	5.2%	30.2x	3.1x	BRACBANK	57,596	1.3%	0.7	9.0x	0.9x
Textile	1,660	1,645	+14.85	+0.90%	58	173,817	2.3%	909.8	18.9%	85.6x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,938	10,985	-46.69	-0.43%	6	42,143	0.6%	147.6	3.1%	40.6x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.9x	0.8x
Tannery	3,279	3,295	-15.92	-0.48%	6	34,631	0.5%	71.2	1.5%	49.9x	3.4x	DUTCHBANGL	44,203	1.0%	0.0	7.6x	1.0x
Jute	15,199	15,206	-7.00	-0.05%	3	3,718	0.0%	26.5	0.6%	NM	-1290.7x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	696	693	+3.54	+0.51%	5	32,196	0.4%	207.5	4.3%	48.6x	1.9x	UNILEVERCL	39,894	0.9%	4.4	45.3x	13.2x
Miscellaneous	4,164	4,196	-31.40	-0.75%	14	226,729	3.0%	300.9	6.2%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.04	+0.04%	10	36,599	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	+0.01	+0.01%	236	2,964,790	39.4%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
RSRMSTEEL	20.9	+10.0%	4.0	NM	0.5x
DACCADYE	16.6	+9.9%	15.8	NM	0.5x
FUWANGCER	19.1	+9.8%	177.1	73.5x	1.6x
ALLTEX	19.2	+9.7%	41.9	NM	2.8x
SONARGAON	36.3	+9.7%	54.0	NM	3.2x
SHYAMPSUG	104.7	+9.4%	8.4	NM	NM
SAFKOSPINN	21.1	+8.8%	27.4	NM	1x
PRIMELIFE	86.5	+7.7%	115.7	NM	NM
TAMIJTEX	195.8	+7.1%	36.5	28.9x	2.2x
SHURWID	16.7	+7.1%	16.0	NM	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KPPL	12.8	-9.9%	40.4	NM	NM
YPL	25.4	-7.0%	69.3	NM	5x
AZIZPIPES	105.5	-5.0%	20.3	NM	NM
PRAGATILIF	126.4	-4.3%	22.5	NM	NM
MEGHNAINS	48.3	-4.2%	23.3	31.4x	3.2x
UNIONCAP	9.3	-4.1%	13.2	NM	NM
PF1STMF	10.0	-3.8%	12.9	NM	1.7x
OAL	12.6	-3.8%	64.0	NM	1.0x
GQBALLPEN	130.2	-3.8%	26.0	NM	1.1x
FARCHEM	10.9	-3.5%	16.0	NM	0.9x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.1%	9.9x	1.7x
BATBC	74,086	4.3%	15.3x	6.9x
BEXIMCO	69,196	4.0%	12.0x	1.2x
RENATA	68,042	4.0%	38.0x	4.6x
BXPHARMA	45,564	2.6%	14.6x	1.5x
BEACONPHAR	39,617	2.3%	80.9x	9.2x
GP	38,700	2.2%	13.0x	7.2x
BRACBANK	30,976	1.8%	9.0x	0.9x
LHBL	26,980	1.6%	14.8x	4.0x
EBL	24,998	1.5%	6.9x	0.9x
OLYMPIC	19,683	1.1%	18.5x	3.1x
NBL	19,116	1.1%	NM	0.7x
PUBALIBANK	18,314	1.1%	4.7x	0.6x
CITYBANK	18,211	1.1%	5.5x	0.8x
SEAPEARL	16,847	1.0%	30.9x	12.3x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	15,220	0.9%	15.0x	1.1x
PRIMEBANK	14,248	0.8%	5.6x	0.7x
BSRMLTD	14,210	0.8%	NM	0.7x
UPGDCL	13,547	0.8%	16.7x	4.4x

\* 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
FUWANGCER	19.1	+9.8%	177.1	73.5x	1.6x
KBPPWBIL	23.0	-0.9%	173.2	NM	1.9x
INTRACO	50.0	+2.9%	167.4	33.2x	3.9x
RUPALILIFE	238.1	+3.6%	147.7	NM	NM
MEGHNALIFE	107.5	+2.1%	131.8	NM	NM
ADVENT	28.1	+6.4%	119.0	26.5x	1.9x
PRIMELIFE	86.5	+7.7%	115.7	NM	NM
SIMTEX	24.3	+2.5%	107.3	26.7x	1.1x
JHRML	82.1	+2.9%	102.3	35.5x	2.6x
DOMINAGE	16.6	+2.5%	89.5	42.6x	1.0x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SIMTEX	26.0	24.3	9.0	1,677	42.21
RUPALILIFE	222.0	210.5	6.0	170	37.23
SALVOCHEM	64.0	64.0	4.0	538	34.43
PTL	78.6	70.5	13.0	284	21.71
LRBDL	32.1	31.6	19.0	545	17.25
EMERALDOIL	130.0	126.0	10.0	115	14.66
FINEFOODS	120.0	106.0	2.0	113	12.16
FUWANGFOOD	22.8	21.2	19.0	566	12.09
CITYGENINS	45.3	45.0	2.0	215	9.68
RDFOOD	52.0	50.0	5.0	184	9.29

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SIMTEX	26.0	24.3	42.2	1,677	9
RUPALILIFE	222.0	210.5	37.2	170	6
SALVOCHEM	64.0	64.0	34.4	538	4
PTL	78.6	70.5	21.7	284	13
LRBDL	32.1	31.6	17.2	545	19
EMERALDOIL	130.0	126.0	14.7	115	10
FINEFOODS	120.0	106.0	12.2	113	2
FUWANGFOOD	22.8	21.2	12.1	566	19
CITYGENINS	45.3	45.0	9.7	215	2
RDFOOD	52.0	50.0	9.3	184	5
ROBI	27.1	27.0	7.7	285	8
ORIONPHARM	71.7	71.7	7.2	100	14
PRIMELIFE	80.3	77.0	6.4	82	3
SQURPHARMA	207.8	206.0	6.2	30	9
IFIC	11.6	10.1	5.6	505	5
AL-HAJTEX	167.0	164.0	4.8	29	3
GPISPAT	40.5	40.4	4.6	114	8
KDSALTD	76.4	69.3	4.5	62	6
ADNTEL	135.5	134.0	4.3	32	2
BATBC	517.0	479.8	4.3	9	7
SHEPHERD	23.9	23.1	3.8	158	3
GP	264.5	261.7	3.4	13	6
<b>Total</b>			<b>334.2</b>		<b>242</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
DGIC		0.0%	5%	Record Date	3-Jul-23
PURABIGEN		3.0%	7%	Record Date	10-Jul-23
SONARBAINS		5.0%	10%	Record Date	20-Jul-23
PRAGATILIF		0.0%	12%	Record Date	20-Jul-23
UNIONINS		0.0%	10%	Record Date	23-Jul-23
ICICL		0.0%	10%	Record Date	23-Jul-23
EIL		0.0%	7%	Record Date	24-Jul-23

#### Important DSE News

##### PRAGATILIF

The Board of Directors has recommended 12% cash dividend for the year ended December 31, 2022. Date of AGM: 10.08.2023, Time: 12:30 PM, Venue: Digital Platform. Record Date: 20.07.2023.

(Q1 Un-audited): As per life revenue account of the company for January to March 2023, Balance of Life Insurance Fund as on March 31, 2023 was BDT 6,217,231,195 as against BDT 6,093,047,010 as on March 31, 2022 resulting a net increase of BDT 124,184,185.

##### PRIMEBANK

Refer to the earlier news disseminated by DSE on 23.10.2022 regarding decision to issue Unsec. Non-Convertible Subordinated Bond, the company has further informed that BSEC has accorded its consent to issue non-convertible, unsecured, fully redeemable, floating rate Prime Bank subordinated bond of BDT 300 crore through private placement to enhance the Tier II capital base of the company.

##### DHAKABANK

The company has informed that the Board of Directors of the company has decided to raise Tk. 600.00 Crore (Taka Six Hundred Crore) only through floatation of Dhaka Bank 4th Subordinated Bond as part of Tier-II Capital of the Company in line with Bangladesh Bank Guidelines on Risk Based Capital Adequacy subject to approval of regulatory authorities.

##### UNIQUEHRL

The company has informed that Unique Meghnaghat Power Limited, a joint venture entity among Unique Hotel & Resorts PLC, Strategic Finance Limited (SFL), Nebras Power Investment Management B.V. (Nebras) and GE Capital Global Energy Investment B.V. (GE), has been successfully connected to the national grid and received back-feed power on 25th June 2023.

##### MIDLANDBNK

The company has informed that the decision for issuance of Zero Coupon Bond of the company was first adopted in a Board Meeting held on 29.11.2021. Subsequently, the terms & timeline, and the rate for issuance of Zero Coupon Bond was amended in later board meetings considering the prevailing rate(s) of the instruments of the financial industry. The key terms and features of the said Zero Coupon Bond are as follows: Nature of instrument: Full redeemable non-convertible unsecured zero-coupon bonds; Purpose of issuance: To increase asset portfolio; Prospective investors: High net worth individuals, general insurance companies, life insurance companies, asset management companies, corporate entities, trusts etc.; Issue size: In face value: BDT 506 Crore; In discounted value: BDT 429.44 Crore - BDT 440.57 Crore (depending on the discount rate the bonds are subscribed at); Tenor: 5 Years; Discount rate: 6.50% p.a. - 7.75% p.a.

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