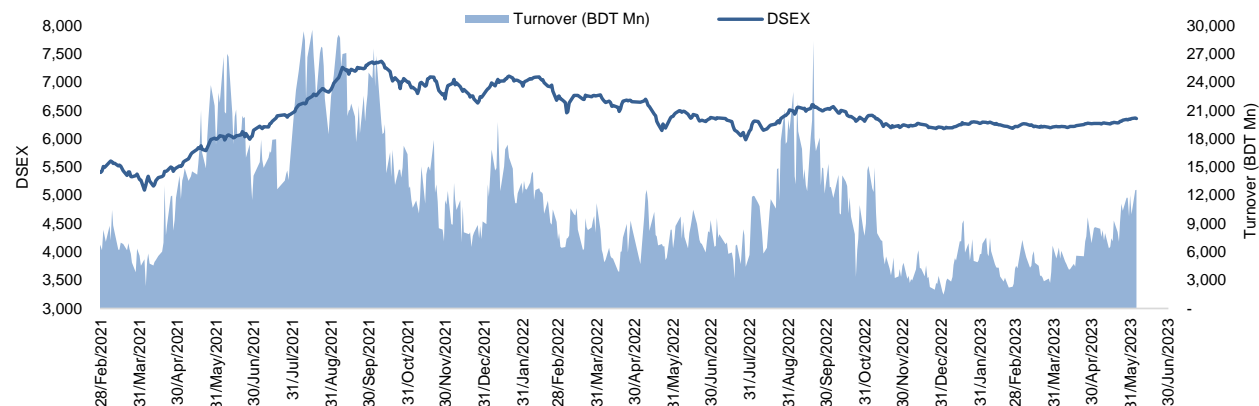


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.15%) lost 9.84 points and closed at 6,356.30. The blue-chip index DS30 (-0.04%), the Shariah-based index DSES (-0.05%), and the large-cap index CDSET (-0.01%) closed at 2,198.22, 1,382.29, and 1,214.23 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.25% followed by Fuel & Power (+0.16%), Pharmaceutical (+0.06%), Bank (+0.04%). Food & Allied experienced the highest loss of 0.28% followed by NBFIL (-0.03%), Telecommunication (0.00%). Block trades contributed 6.0% of the overall market turnover. Lub-rref (Bangladesh) Limited (+10.0%) was the most traded share with a turnover of BDT 586 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,356.30	6,366.14	-9.84	-0.15%	+2.4%
DS30	2,198.22	2,199.05	-0.84	-0.04%	+0.1%
DSES	1,382.29	1,383.00	-0.71	-0.05%	+1.7%
CDSET	1,214.23	1,214.38	-0.15	-0.01%	-0.0%

	Advanced	Declined	Unchanged	Total
All Category	72	113	181	366
A Category (Equity)	31	87	127	245
B Category (Equity)	35	19	45	99
N Category (Equity)	2	2	1	5
Z Category (Equity)	4	5	8	17
Mutual Funds	1	1	26	28
Corporate Bonds	0	1	0	1
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,740,339	7,749,343	-0.1%
	Mn USD	71,819	71,903	
Turnover	Mn BDT	12,567	12,544	+0.2%
	Mn USD	117	116	
Volume	Mn Shares	238	227	+4.9%
No. of Trade		254,906	220,896	+15.4%

* Average Interbank Exchange Rate is BDT 107.78 as of Jun 04, 2023

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Figure: Sectorial Turnover (BDT Mn)

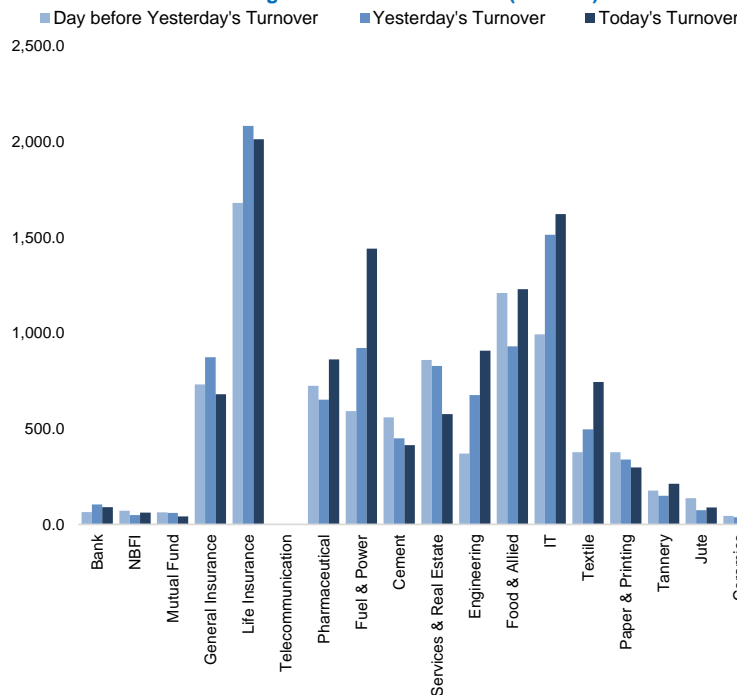
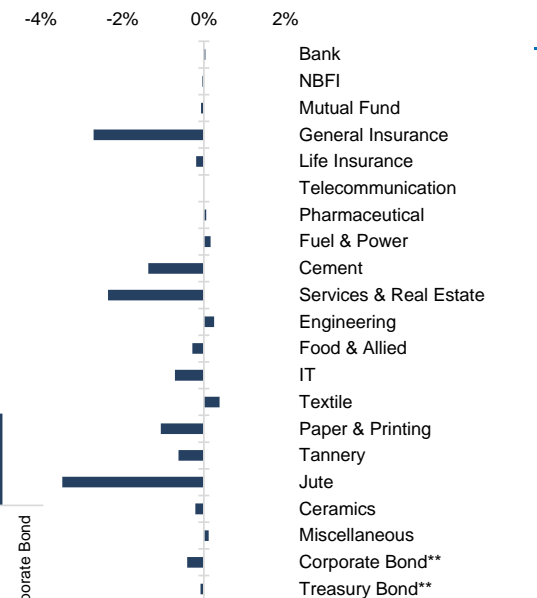


Figure: Sectorial Mcap Change



Market PE 18.4x

Market PB 1.5x

* Market P/E calculation excludes 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	1,443	1,442	+0.53	+0.04%	35	680,498	9.0%	89.7	0.8%	11.8x	0.7x	GP	386,996	8.5%	0.5	13.0x	7.2x
NBFI	1,922	1,923	-0.65	-0.03%	23	187,033	2.5%	61.1	0.5%	NM	4.3x	WALTONHIL	317,378	6.9%	0.1	49.1x	3.2x
Mutual Fund	832	833	-0.55	-0.07%	37	37,647	0.5%	41.7	0.4%	NM	0.7x	BATBC	280,098	6.1%	1.6	15.3x	6.9x
General Insurance	3,437	3,533	-95.62	-2.71%	42	100,316	1.3%	679.9	5.8%	18.2x	1.6x	SQURPHARM	185,977	4.1%	2.5	9.9x	1.7x
Life Insurance	3,086	3,092	-5.92	-0.19%	15	86,257	1.1%	2,012.1	17.0%	NM	NM	ROBI	157,138	3.4%	0.4	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.2	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,709	3,707	+2.18	+0.06%	34	719,428	9.5%	861.7	7.3%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,714	1,712	+2.81	+0.16%	23	452,208	6.0%	1,440.7	12.2%	23.7x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,651	2,687	-36.63	-1.36%	7	127,321	1.7%	414.6	3.5%	32.4x	2.8x	BERGERPBL	83,239	1.8%	3.3	27.7x	6.4x
Services & Real Esta	2,045	2,094	-49.18	-2.35%	8	80,804	1.1%	575.8	4.9%	29.3x	1.0x	LHBL	82,458	1.8%	221.3	15.2x	4.1x
Engineering	4,537	4,525	+11.44	+0.25%	42	532,442	7.0%	906.9	7.7%	72.8x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,499	21,559	-60.24	-0.28%	21	397,809	5.3%	1,228.4	10.4%	20.0x	8.1x	BXPHARMA	65,222	1.4%	0.3	14.6x	1.5x
IT	3,484	3,509	-24.98	-0.71%	11	45,418	0.6%	1,621.0	13.7%	31.8x	3.3x	BRACBANK	57,596	1.3%	0.2	9.0x	0.9x
Textile	1,626	1,619	+6.24	+0.39%	58	171,331	2.3%	743.3	6.3%	#REF!	1.1x	BEACONPHAR	56,595	1.2%	0.2	80.9x	9.2x
Paper & Printing	10,869	10,984	-115.63	-1.05%	6	41,875	0.6%	298.2	2.5%	40.4x	2.1x	ISLAMIBANK	52,486	1.1%	0.1	8.9x	0.8x
Tannery	3,250	3,270	-20.42	-0.62%	6	34,320	0.5%	212.8	1.8%	49.4x	3.4x	DUTCHBANGL	44,203	1.0%	0.0	7.6x	1.0x
Jute	15,601	16,162	-561.17	-3.47%	3	3,816	0.1%	89.2	0.8%	NM	6.1x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	690	691	-1.44	-0.21%	5	31,903	0.4%	54.5	0.5%	48.8x	1.9x	UNILEVERCL	39,329	0.9%	3.3	44.7x	13.1x
Miscellaneous	4,184	4,179	+4.82	+0.12%	14	227,804	3.0%	479.8	4.1%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	89	-0.36	-0.41%	9	36,390	0.5%	1.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.1	12.1x	0.9x
Treasury Bond**	93	93	-0.07	-0.08%	252	2,981,494	39.5%	0.5	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BDAUTOCA	173.9	+10.0%	73.9	NM	24.0x
LEGACYFOOT	116.7	+10.0%	155.4	NM	13.1x
LRBDL	38.6	+10.0%	585.8	17.6x	1.0x
TILIL	54.2	+9.9%	0.9	NM	NM
SKTRIMS	30.6	+9.7%	77.3	27.1x	2.0x
DELTALIFE	155.8	+8.2%	220.5	NM	NM
ADVENT	28.8	+7.9%	228.9	27.2x	2x
MIRAKHTER	60.0	+7.5%	91.5	24.7x	1.3x
MEGHNALIFE	109.8	+6.5%	458.2	NM	NM
BENGALWTL	30.4	+5.9%	111.9	62.0x	1.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NTC	449.5	-8.7%	7.0	NM	222.5x
NORTHERN	308.1	-8.5%	38.2	NM	4x
MEGHNAINS	50.3	-7.7%	90.1	32.7x	3.3x
SONALILIFE	93.4	-7.3%	202.7	NM	NM
SEAPPEARL	209.1	-7.1%	178.0	30.3x	12.1x
CRYSTALINS	48.3	-6.9%	25.3	16.0x	1.9x
AGRANINS	43.9	-6.8%	9.0	22.9x	2.2x
PRAGATILIF	146.5	-6.7%	149.4	NM	NM
PARAMOUNT	53.8	-6.4%	23.8	30.7x	2.0x
POPULARLIF	86.0	-6.1%	100.5	NM	NM

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%	15.2x	4.1x
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%	4.6x	0.6x
CITYBANK	18,211	1.1%	5.5x	0.8x
SEAPPEARL	16,847	1.0%	30.3x	12.1x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	15,220	0.9%	15.8x	1.1x
PRIMEBANK	14,248	0.8%	5.4x	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
LRBDL	38.6	+10.0%	585.8	17.6x	1.0x
MEGHNALIFE	109.8	+6.5%	458.2	NM	NM
INTRACO	52.4	+2.3%	454.5	34.8x	4.1x
ITC	43.6	+2.1%	363.8	19.6x	2.4x
RUPALILIFE	209.6	-5.7%	353.1	NM	NM
RDFOOD	51.0	+3.0%	278.9	41.5x	3.2x
NAVANAPHAR	104.4	-5.5%	248.1	23.7x	2.6x
AGNISYS	32.8	+1.9%	230.8	27.8x	2.1x
ADVENT	28.8	+7.9%	228.9	27.2x	1.9x
LHBL	71.0	-0.8%	221.3	15.2x	4.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
AOL	36.3	32.9	157.0	3,836	126.54
GP	261.6	261.6	25.0	269	70.46
BATBC	479.9	479.8	19.0	116	55.67
EMERALDOIL	109.8	109.8	3.0	500	54.90
EGEN	45.3	40.7	35.0	939	40.21
BXPHARMA	145.5	140.5	23.0	256	37.06
ANWARGALV	195.0	194.7	29.0	134	26.13
GEMINISEA	920.0	812.0	8.0	30	24.63
PRAGATILIF	156.9	156.5	3.0	148	23.22
FINEFOODS	98.0	91.1	8.0	206	19.77

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
AOL	36.3	32.9	126.5	3,836	157
GP	261.6	261.6	70.5	269	25
BATBC	479.9	479.8	55.7	116	19
EMERALDOIL	109.8	109.8	54.9	500	3
EGEN	45.3	40.7	40.2	939	35
BXPHERMA	145.5	140.5	37.1	256	23
ANWARGALV	195.0	194.7	26.1	134	29
GEMINISEA	920.0	812.0	24.6	30	8
PRAGATILIF	156.9	156.5	23.2	148	3
FINEFOODS	98.0	91.1	19.8	206	8
CNATEX	10.1	10.1	16.8	1,662	4
LRBDL	34.9	31.6	16.4	512	31
SIMTEX	26.3	23.2	15.1	594	4
ORIONPHARM	78.4	71.7	14.3	190	18
SQURPHARMA	206.6	204.0	9.9	48	16
DOMINAGE	16.1	14.6	9.1	609	14
KDSALTD	78.7	72.0	8.8	116	6
QUASEMIND	64.1	56.9	7.9	127	3
AL-HAJTEX	168.0	156.0	7.5	47	5
UNIONINS	66.1	61.2	7.4	115	3
SILVAPHL	20.0	19.5	7.1	364	9
GENEXIL	93.9	93.9	6.6	70	1
Total			752.8		580

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
RUPALIINS		0.0%	10%	Record Date	6-Jun-23
SOUTHEASTB		4.0%	6%	Record Date	7-Jun-23
ONEBANKLTD		5.0%	0%	Record Date	8-Jun-23
NCCBANK		5.0%	5%	Record Date	8-Jun-23
RUPALIBANK		0.0%	0%	Record Date	11-Jun-23
ALARABANK		3.0%	12%	Record Date	12-Jun-23
NBL		0.0%	0%	Record Date	12-Jun-23
GLOBALINS		0.0%	12%	Record Date	13-Jun-23
PROVATIINS		0.0%	12%	Record Date	19-Jun-23
BGIC		0.0%	12%	Record Date	20-Jun-23
DHAKAINS		0.0%	20%	Record Date	22-Jun-23
BERGERPBL		0.0%	400%	Record Date	26-Jun-23
EMERALDOIL		0.0%	2%	Record Date	26-Jun-23
DGIC		0.0%	5%	Record Date	3-Jul-23
PURABIGEN		3.0%	7%	Record Date	10-Jul-23

Important DSE News

RINGSHINE

(Q3 Un-audited): EPS was Tk. (0.73) for January-March 2023 as against Tk. (0.59) for January-March 2022; EPS was Tk. (1.49) for July 2022-March 2023 as against Tk. (0.94) for July 2021-March 2022. NOCFPS was Tk. (0.13) for July 2022-March 2023 as against Tk. (0.83) for July 2021-March 2022. NAV per share was Tk. (3.94) as on March 31, 2023 and Tk. (2.50) as on June 30, 2022.

MALEKSPIN

The company has informed that Board of Directors of Paragon Poultry Limited has appointed Mr. Mahir Rahman as Nominated Director of Malek Spinning Mills Ltd. in place of Mr. Moshir Rahman. As such, the Board of Directors of Malek Spinning Mills Ltd. has approved the withdrawal of Mr. Moshir Rahman and appointment of Mr. Mahir Rahman as nominated director with effect from June 04, 2023.

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