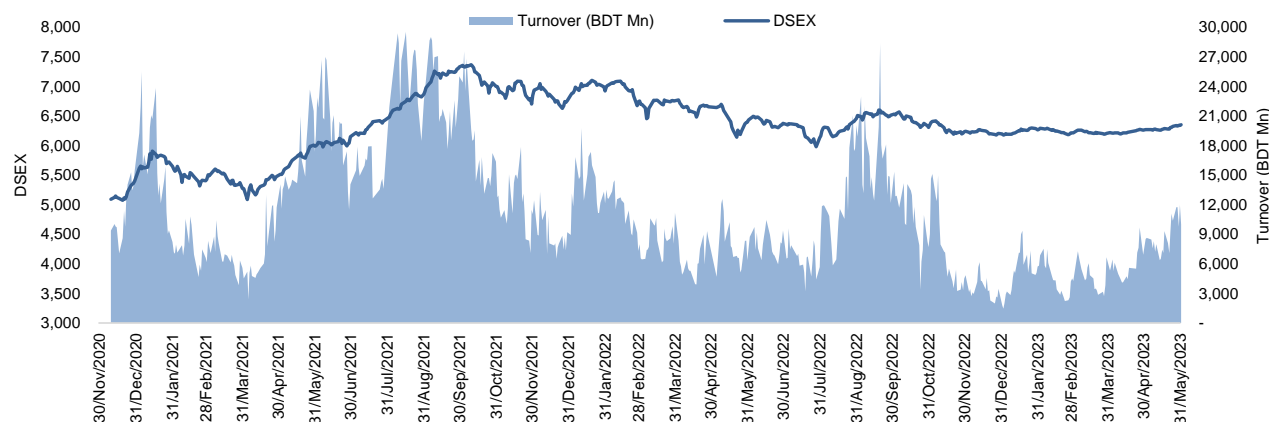


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.25%) gained 15.82 points and closed at 6,355.56. The blue-chip index DS30 (+0.15%), the Shariah-based index DSES (+0.19%), and the large-cap index CDSET (+0.03%) closed at 2,201.33, 1,379.57, and 1,214.42 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.12% followed by Fuel & Power (+0.09%), Food & Allied (+0.05%). Pharmaceutical experienced the highest loss of 0.07% followed by Bank (0.00%), NBFI (0.00%). Block trades contributed 6.1% of the overall market turnover. Gemini Sea Food Ltd. (+0.7%) was the most traded share with a turnover of BDT 502 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,355.56	6,339.74	+15.82	+0.25%	+2.4%
DS30	2,201.33	2,198.02	+3.31	+0.15%	+0.3%
DSES	1,379.57	1,377.00	+2.57	+0.19%	+1.5%
CDSET	1,214.42	1,214.02	+0.40	+0.03%	-

	Advanced	Declined	Unchanged	Total
All Category	105	71	190	366
A Category (Equity)	72	43	127	242
B Category (Equity)	27	21	53	101
N Category (Equity)	4	0	1	5
Z Category (Equity)	2	7	9	18
Mutual Funds	3	4	21	28
Corporate Bonds	0	1	0	1
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,742,813	7,737,190	+0.1%
	Mn USD	71,809	71,757	
Turnover	Mn BDT	9,978	11,987	-16.8%
	Mn USD	93	111	
Volume	Mn Shares	154	208	-26.0%
No. of Trade		204,608	248,668	-17.7%

* Average Interbank Exchange Rate is BDT 107.83 as of May 31, 2023

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Figure: Sectorial Turnover (BDT Mn)

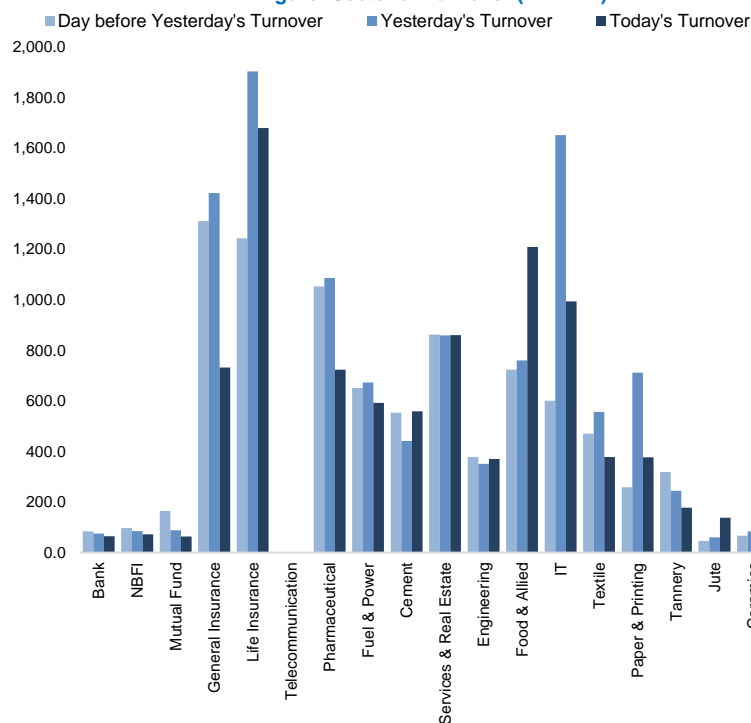
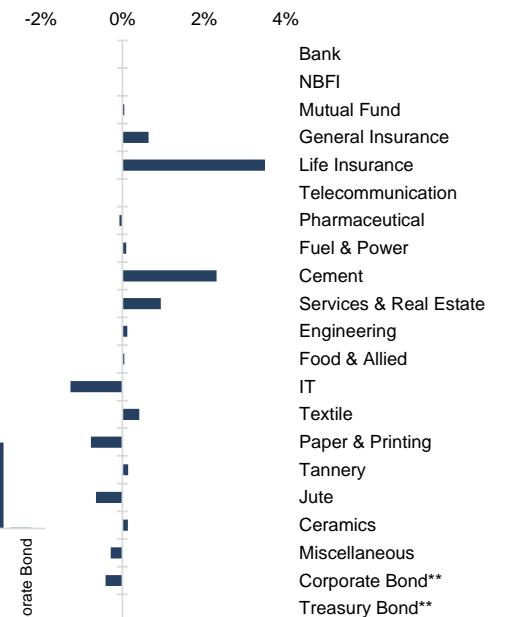


Figure: Sectorial Mcap Change



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	1,443	-0.04	-0.00%	35	680,662	9.0%	63.8	0.7%	11.8x	0.7x	GP	386,996	8.5%	0.3	13.0x	7.2x
NBFI	1,924	1,924	-0.05	-0.00%	23	187,245	2.5%	71.8	0.8%	NM	4.3x	WALTONHIL	317,378	6.9%	0.0	49.1x	3.2x
Mutual Fund	835	835	+0.41	+0.05%	37	37,776	0.5%	63.1	0.7%	NM	0.7x	BATBC	280,098	6.1%	2.5	15.3x	6.9x
General Insurance	3,566	3,543	+22.82	+0.64%	42	104,085	1.4%	731.5	7.8%	18.9x	1.6x	SQURPHARM/	185,977	4.1%	2.5	9.9x	1.7x
Life Insurance	3,014	2,912	+101.87	+3.50%	15	84,247	1.1%	1,679.0	17.9%	NM	NM	ROBI	157,138	3.4%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.4	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,706	3,709	-2.71	-0.07%	34	718,888	9.5%	723.4	7.7%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,708	1,706	+1.57	+0.09%	23	450,514	6.0%	591.5	6.3%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,664	2,604	+60.13	+2.31%	7	127,970	1.7%	558.6	6.0%	32.5x	2.8x	LHBL	83,387	1.8%	257.5	15.4x	4.2x
Services & Real Estate	2,113	2,094	+19.65	+0.94%	8	83,496	1.1%	859.7	9.2%	30.2x	1.1x	BERGERPBL	82,891	1.8%	6.7	27.5x	6.4x
Engineering	4,509	4,504	+5.49	+0.12%	42	529,251	7.0%	370.1	3.9%	72.4x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,582	21,571	+10.64	+0.05%	21	399,348	5.3%	1,208.2	12.9%	20.0x	8.2x	BXPHERMA	65,222	1.4%	0.1	14.6x	1.5x
IT	3,393	3,437	-43.68	-1.27%	11	44,237	0.6%	992.9	10.6%	31.0x	3.2x	BRACBANK	57,596	1.3%	0.5	9.0x	0.9x
Textile	1,620	1,613	+6.66	+0.41%	58	170,711	2.3%	377.1	4.0%	77.7x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	11,068	11,154	-86.36	-0.77%	6	42,643	0.6%	376.6	4.0%	41.1x	2.1x	ISLAMIBANK	52,486	1.1%	0.4	8.9x	0.8x
Tannery	3,247	3,242	+4.58	+0.14%	6	34,292	0.5%	176.9	1.9%	49.4x	3.4x	DUTCHBANGL	44,203	1.0%	0.0	7.6x	1.0x
Jute	15,941	16,045	-103.82	-0.65%	3	3,900	0.1%	137.6	1.5%	NM	6.3x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	693	692	+0.92	+0.13%	5	32,037	0.4%	44.6	0.5%	49.0x	1.9x	UNILEVERCL	39,767	0.9%	1.4	45.2x	13.2x
Miscellaneous	4,178	4,190	-11.87	-0.28%	14	227,485	3.0%	340.3	3.6%	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%	0.7	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	+0.02	+0.02%	252	2,981,459	39.5%	2.4	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap (BDT Mn)	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MEGHNALIFE	93.8	+10.0%	328.4	NM	NM	SQURPHARMA	121,499	7.1%	9.9x	1.7x	GEMINISEA	817.9	+0.7%	501.7	39.0x	32.2x
MEGHNACEM	67.6	+9.9%	7.7	57.4x	1.3x	BATBC	74,086	4.3%	15.3x	6.9x	INTRACO	47.0	+6.3%	364.5	31.2x	3.7x
TILIL	44.9	+9.8%	0.3	NM	NM	BEXIMCO	69,196	4.0%	12.0x	1.2x	SEAPEARL	226.7	+6.3%	333.9	32.9x	13.1x
OIMEX	27.0	+9.8%	72.7	NM	2.5x	RENATA	68,042	4.0%	38.0x	4.6x	MEGHNALIFE	93.8	+10.0%	328.4	NM	NM
PRIMELIFE	71.9	+8.9%	53.9	NM	NM	BXPHARMA	45,564	2.6%	14.6x	1.5x	NAVANAPHAR	105.3	-1.7%	316.6	23.9x	2.6x
HEIDELBCEM	297.9	+8.6%	160.2	52.4x	4.5x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	RUPALILIFE	208.6	+5.9%	295.4	NM	NM
BEACHHATCH	45.7	+8.6%	203.0	43.9x	4x	GP	38,700	2.2%	13.0x	7.2x	LHBL	71.8	+1.1%	257.5	15.4x	4.2x
PRAGATILIF	147.8	+8.4%	227.3	NM	NM	BRACBANK	30,976	1.8%	9.0x	0.9x	UNIQUEHRL	77.0	-2.0%	236.5	13.5x	0.9x
RSRMSTEEL	22.3	+8.3%	20.6	NM	0.5x	LHBL	26,980	1.6%	15.4x	4.2x	PRAGATILIF	147.8	+8.4%	227.3	NM	NM
PROGRESLIF	88.6	+7.9%	20.3	NM	NM	EBL	24,998	1.5%	6.9x	0.9x	EHL	105.0	-2.5%	222.1	15.6x	1.4x
						OLYMPIC	19,683	1.1%	18.8x	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						
						SEAPEARL	16,847	1.0%	32.9x	13.1x						
						ROBI	15,714	0.9%	85.7x	2.3x						
						ALARABANK	15,220	0.9%	15.7x	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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPEARL	215.0	199.0	103.5	502	18
RUPALILIFE	216.5	180.0	101.0	543	15
PRAGATILIF	144.6	129.0	63.5	480	11
BSC	130.0	130.0	58.5	450	1
BSRMLTD	90.0	90.0	22.4	249	1
SQURPHARMA	208.5	204.0	20.6	99	26
POWERGRID	52.0	52.0	20.0	385	1
BATBC	485.0	479.8	15.4	32	13
DESCO	33.5	33.0	14.2	430	12
BEXIMCO	115.5	104.1	11.8	111	5
BXPHARMA	140.0	137.7	9.8	71	11
GEMINISEA	857.0	780.0	9.8	12	5
EGEN	40.7	40.7	9.7	237	5
AOL	35.4	32.9	8.8	265	6
BRACBANK	39.0	32.3	8.8	264	3
SONALIPAPR	657.3	570.0	7.9	13	6
ORIONPHARM	73.3	71.7	7.4	103	14
ANWARGALV	195.0	194.7	7.0	36	8
FINEFOODS	101.0	85.0	6.4	65	3
GP	261.6	261.6	5.8	22	9
LHBL	71.0	63.9	5.5	85	2
ISLAMIBANK	29.4	29.4	5.4	184	1
Total			608.1		274

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SIBL		5.0%	5%	Record Date	5-Jun-23
STANDBANKL		2.5%	3%	Record Date	5-Jun-23
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
DGIC		0.0%	5%	Record Date	3-Jul-23
PURABIGEN		3.0%	7%	Record Date	10-Jul-23

Important DSE News

BERGERPBL

The Board of Directors has recommended 400% cash dividend for the year ended March 31, 2023. Date of AGM: 22.08.2023, Time of AGM: 10:00 AM, Venue: Digital Platform. Record Date: 26.06.2023. The Company has also reported Consolidated EPS of Tk. 64.91, Consolidated NAV per share of Tk. 279.78 and Consolidated NOCFPS of Tk. 74.30 for the year ended March 31, 2023 as against Tk. 62.68, Tk. 227.39 and Tk. 63.32 respectively for the year ended March 31, 2022.

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