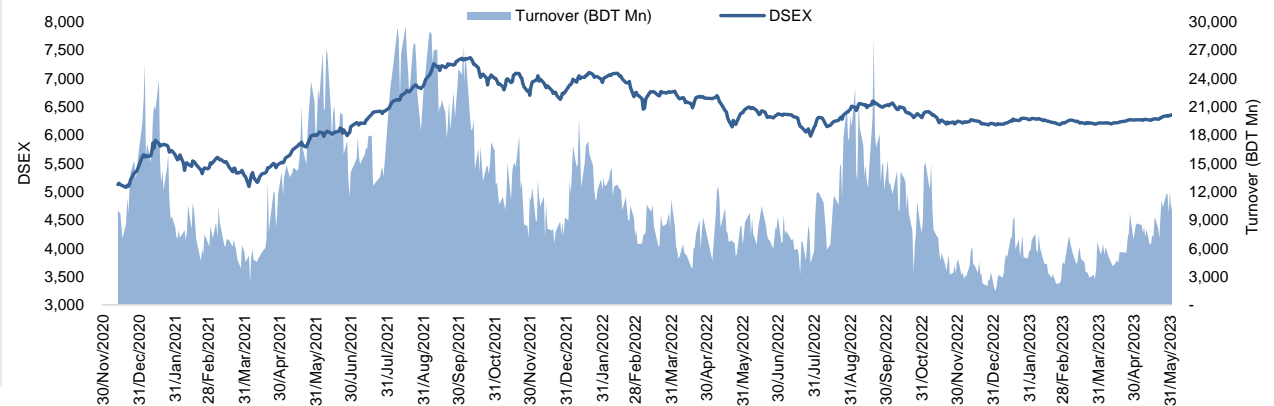


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.17%) gained 10.58 points and closed at 6,366.14. The blue-chip index DS30 (-0.10%), the Shariah-based index DSES (+0.25%), and the large-cap index CDSET (0.00%) closed at 2,199.05, 1,383.00, and 1,214.38 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.35% followed by Fuel & Power (+0.21%), Pharmaceutical (+0.02%). Food & Allied experienced the highest loss of 0.11% followed by NBF1 (-0.08%), Bank (-0.06%). Block trades contributed 15.6% of the overall market turnover. Intraco Refueling Station Limited (+8.9%) was the most traded share with a turnover of BDT 593 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,366.14	6,355.56	+10.58	+0.17%	+2.6%
DS30	2,199.05	2,201.33	-2.28	-0.10%	+0.2%
DSES	1,383.00	1,379.57	+3.43	+0.25%	+1.8%
CDSET	1,214.38	1,214.42	-0.04	-0.00%	-0.0%

	Advanced	Declined	Unchanged	Total
All Category	77	104	173	354
A Category (Equity)	50	68	118	236
B Category (Equity)	25	25	47	97
N Category (Equity)	1	3	1	5
Z Category (Equity)	1	8	7	16
Mutual Funds	0	5	21	26
Corporate Bonds	1	0	1	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,749,343	7,742,813	+0.1%
	Mn USD	71,853	71,792	
Turnover	Mn BDT	12,544	9,978	+25.7%
	Mn USD	116	93	
Volume	Mn Shares	227	154	+47.7%
No. of Trade		220,896	204,608	+8.0%

* Average Interbank Exchange Rate is BDT 107.85 as of Jun 01, 2023

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Figure: Sectorial Turnover (BDT Mn)

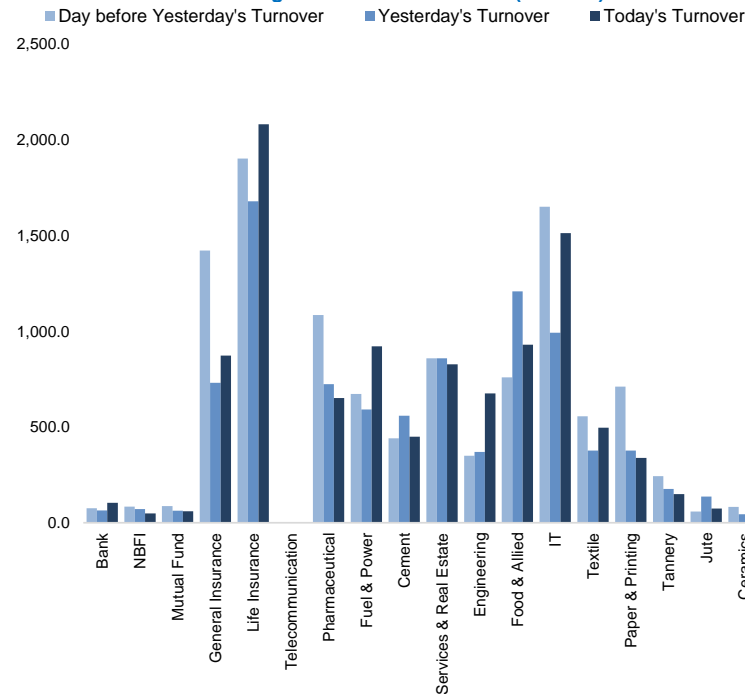
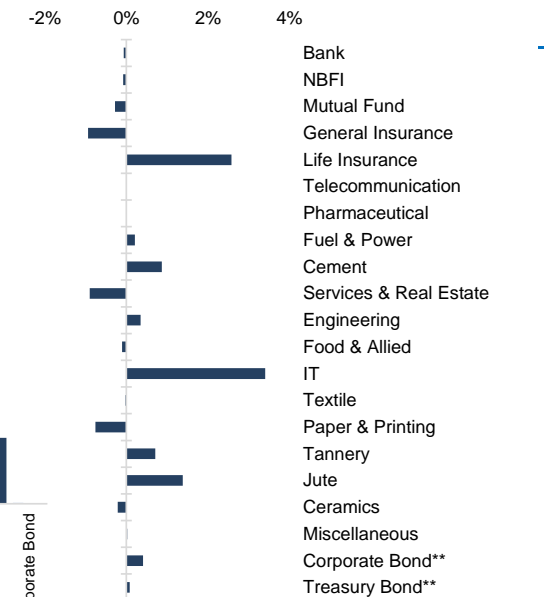


Figure: Sectorial Mcap Change



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	1,444	-0.88	-0.06%	35	680,249	9.0%	104.5	1.0%	11.8x	0.7x	GP	386,996	8.5%	0.5	13.0x	7.2x
NBFI	1,923	1,924	-1.52	-0.08%	23	187,097	2.5%	49.3	0.5%	NM	4.3x	WALTONHIL	317,378	6.9%	0.0	49.1x	3.2x
Mutual Fund	833	835	-2.33	-0.28%	37	37,671	0.5%	60.8	0.6%	NM	0.7x	BATBC	280,098	6.1%	1.8	15.3x	6.9x
General Insurance	3,533	3,566	-33.52	-0.94%	42	103,106	1.4%	872.9	8.2%	18.7x	1.6x	SQURPHARM	185,977	4.1%	4.6	9.9x	1.7x
Life Insurance	3,092	3,014	+77.83	+2.58%	15	86,422	1.1%	2,081.4	19.7%	NM	NM	ROBI	157,138	3.4%	0.3	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.8	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.7	38.0x	4.6x
Pharmaceutical	3,707	3,706	+0.61	+0.02%	34	719,005	9.5%	651.0	6.2%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,712	1,708	+3.61	+0.21%	23	451,468	6.0%	921.0	8.7%	23.7x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,687	2,664	+23.11	+0.87%	7	129,080	1.7%	450.1	4.3%	32.8x	2.8x	LHBL	83,154	1.8%	163.8	15.4x	4.2x
Services & Real Esta	2,094	2,113	-18.96	-0.90%	8	82,747	1.1%	827.9	7.8%	30.0x	1.1x	BERGERPBL	83,114	1.8%	1.6	27.6x	6.4x
Engineering	4,525	4,509	+15.75	+0.35%	42	531,099	7.0%	675.4	6.4%	72.6x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,559	21,582	-22.89	-0.11%	21	398,924	5.3%	930.8	8.8%	20.0x	8.2x	BXPHARMA	65,222	1.4%	0.2	14.6x	1.5x
IT	3,509	3,393	+115.57	+3.41%	11	45,743	0.6%	1,513.2	14.3%	32.0x	3.3x	BRACBANK	57,596	1.3%	0.1	9.0x	0.9x
Textile	1,630	1,630	-0.36	-0.02%	58	170,673	2.3%	497.3	4.7%	77.7x	1.1x	BEACONPHAR	56,595	1.2%	0.1	80.9x	9.2x
Paper & Printing	10,984	11,068	-83.62	-0.76%	6	42,321	0.6%	338.5	3.2%	40.8x	2.1x	ISLAMIBANK	52,486	1.1%	0.3	8.9x	0.8x
Tannery	3,270	3,247	+23.12	+0.71%	6	34,536	0.5%	149.5	1.4%	49.7x	3.4x	DUTCHBANGL	44,203	1.0%	0.1	7.6x	1.0x
Jute	16,162	15,941	+220.70	+1.38%	3	3,954	0.1%	73.9	0.7%	NM	6.4x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	691	693	-1.46	-0.21%	5	31,970	0.4%	37.0	0.3%	48.9x	1.9x	UNILEVERCL	39,888	0.9%	2.5	45.3x	13.2x
Miscellaneous	4,179	4,178	+1.04	+0.02%	14	227,542	3.0%	344.9	3.3%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.1	NM	0.4x
Corporate Bond**	89	88	+0.36	+0.41%	9	36,540	0.5%	0.9	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.1	12.1x	0.9x
Treasury Bond**	93	93	+0.08	+0.08%	252	2,983,874	39.4%	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
BENGALWTL	28.7	+10.0%	130.2	58.6x	1.0x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	INTRACO	51.2	+8.9%	593.4	34.0x	4.0x
MEGHNALIFE	103.1	+9.9%	427.4	NM	NM	BATBC	74,086	4.3%	15.3x	6.9x	MEGHNALIFE	103.1	+9.9%	427.4	NM	NM
MIRAKHTER	55.8	+9.8%	94.0	23.0x	1.2x	BEXIMCO	69,196	4.0%	12.0x	1.2x	SEAPEARL	225.1	-0.7%	372.4	32.6x	13.0x
TILIL	49.3	+9.8%	0.4	NM	NM	RENATA	68,042	4.0%	38.0x	4.6x	ADNTEL	143.1	+8.4%	307.7	37.2x	5.2x
PROGRESLIF	97.2	+9.7%	61.5	NM	NM	BXPHARMA	45,564	2.6%	14.6x	1.5x	RUPALILIFE	222.2	+6.5%	306.6	NM	NM
AGNISYS	32.2	+9.5%	298.9	27.3x	2.0x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	AGNISYS	32.2	+9.5%	298.9	27.3x	2.0x
MEGHNACEM	73.7	+9.0%	23.7	62.6x	1x	GP	38,700	2.2%	13.0x	7.2x	AAMRANET	80.0	+1.7%	258.3	20.9x	2.1x
INTRACO	51.2	+8.9%	593.4	34.0x	4.0x	BRACBANK	30,976	1.8%	9.0x	0.9x	ITC	42.7	+6.8%	246.3	19.1x	2.3x
PADMALIFE	51.4	+8.4%	97.9	NM	NM	LHBL	26,980	1.6%	15.4x	4.2x	NAVANAPHAR	110.5	+4.9%	233.7	25.1x	2.7x
ADNTEL	143.1	+8.4%	307.7	37.2x	5.2x	EBL	24,998	1.5%	6.9x	0.9x	CVOPRL	222.3	+7.3%	231.1	NM	30.8x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	OLYMPIC	19,683	1.1%	18.5x	3.1x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MEGHNAPET	43.2	-10.0%	12.0	NM	NM	NBL	19,116	1.1%	NM	0.7x	ISLAMIBANK	32.6	32.6	1.0	34,250	1,116.55
MEGCONMILK	32.1	-9.8%	13.4	21.7x	NM	PUBALIBANK	18,314	1.1%	4.6x	0.6x	RUPALILIFE	212.0	195.0	13.0	1,064	221.18
BDWELDING	24.1	-9.7%	12.9	NM	2.1x	CITYBANK	18,211	1.1%	5.5x	0.8x	SIMTEX	25.3	22.7	18.0	4,710	113.05
NTC	492.5	-7.5%	10.5	NM	243.8x	SEAPEARL	16,847	1.0%	32.6x	13.0x	SEAPEARL	233.0	212.0	3.0	330	76.37
MIDLANDBNK	12.7	-7.3%	39.3	13.1x	1.0x	ROBI	15,714	0.9%	85.7x	2.3x	SAIFPOWER	29.7	29.2	3.0	2,222	65.02
CAPMIBLMF	14.8	-5.7%	22.8	NM	1.6x	ALARABANK	15,220	0.9%	15.7x	1.1x	EMERALDOIL	120.0	111.0	5.0	418	50.00
MIRACLEIND	32.1	-5.3%	57.2	NM	1.0x	PRIMEBANK	14,248	0.8%	5.5x	0.7x	LRBDL	32.3	31.6	20.0	952	30.11
SHYAMPUSUG	90.2	-4.6%	2.3	NM	NM	BSRMLTD	14,210	0.8%	NM	0.7x	GP	261.6	261.6	21.0	99	26.00
USMANIAGL	60.1	-4.0%	2.3	NM	0.7x	UPGDCL	13,547	0.8%	16.7x	4.4x	UNIONINS	59.6	59.0	5.0	265	15.69
1STPRIMFMF	14.8	-3.9%	3.5	NM	1.4x						BEACONPHAR	244.0	225.0	7.0	64	14.94

* 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
ISLAMIBANK	32.6	32.6	1,116.6	34,250	1
RUPALILIFE	212.0	195.0	221.2	1,064	13
SIMTEX	25.3	22.7	113.1	4,710	18
SEAPEARL	233.0	212.0	76.4	330	3
SAIFPOWER	29.7	29.2	65.0	2,222	3
EMERALDOIL	120.0	111.0	50.0	418	5
LRBDL	32.3	31.6	30.1	952	20
GP	261.6	261.6	26.0	99	21
UNIONINS	59.6	59.0	15.7	265	5
BEACONPHAR	244.0	225.0	14.9	64	7
INTRACO	48.0	47.0	14.8	315	2
RDFOOD	51.2	47.5	12.5	257	4
ANWARGALV	194.9	194.7	12.5	64	15
MIRAKHTER	52.3	50.8	10.8	208	6
BEXIMCO	113.8	104.1	10.1	94	6
GEMINISEA	870.0	770.0	9.7	12	3
ISLAMIINS	55.0	53.7	8.6	160	3
BATBC	500.8	479.8	8.6	18	11
BXPHERMA	146.0	139.9	8.4	59	5
ADNTEL	128.2	122.0	8.4	69	2
SHEPHERD	26.2	26.0	8.3	318	2
AOL	36.3	32.9	8.2	244	8
Total			1,963.0		291

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
EMERALDOIL		0.0%	2%	Record Date	26-Jun-23
DGIC		0.0%	5%	Record Date	3-Jul-23

Important DSE News

EMERALDOIL

The Board of Directors has recommended No dividend for the year ended June 30, 2020. Date of AGM: 12.07.2023, Time of AGM: 1:00 PM, Venue: Digital Platform. Record Date: 26.06.2023. The Company has also reported EPS of Tk. (0.76), NAV per share of Tk. (19.99) and NOCFPS of Tk. 0.106 for the year ended June 30, 2020 as against Tk. (1.14), Tk. (20.57) and Tk. 0.003 respectively for the year ended June 30, 2019.

The Board of Directors has recommended No dividend for the year ended June 30, 2021. Date of AGM: 12.07.2023, Time of AGM: 2:30 PM, Venue: Digital Platform. Record Date: 26.06.2023. The Company has also reported EPS of Tk. (0.58), NAV per share of Tk. (20.29) and NOCFPS of Tk. (0.054) for the year ended June 30, 2021 as against Tk. (0.76), Tk. (19.99) and Tk. 0.106 respectively for the year ended June 30, 2020.

The Board of Directors has recommended 2% Cash dividend except previous sponsors and directors holding 30.45% shares for the year ended June 30, 2022. Date of AGM: 12.07.2023, Time of AGM: 3:00 PM, Venue: Digital Platform. Record Date: 26.06.2023. The Company has also reported EPS of Tk. 0.17, NAV per share of Tk. (12.85) and NOCFPS of Tk. (2.40) for the year ended June 30, 2022 as against Tk. (0.58), Tk. (20.29) and Tk. (0.054) respectively for the year ended June 30, 2021.

IPDC

The company has informed that the Board of Directors has appointed Mr. Mir Khairul Alam, Additional Secretary, Ministry of Industries as Nominee Director on the Board of the company.

FIRSTSBANK

The company has informed that Board of Directors has appointed Professor Md. Kamal Uddin, PhD as Independent Director of the company.

CENTRALINS

Md. Nurul Islam, one of the Sponsor Directors of the Company, has further informed that he has completed his buying of 5,000 shares of the company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 22.05.2023.

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