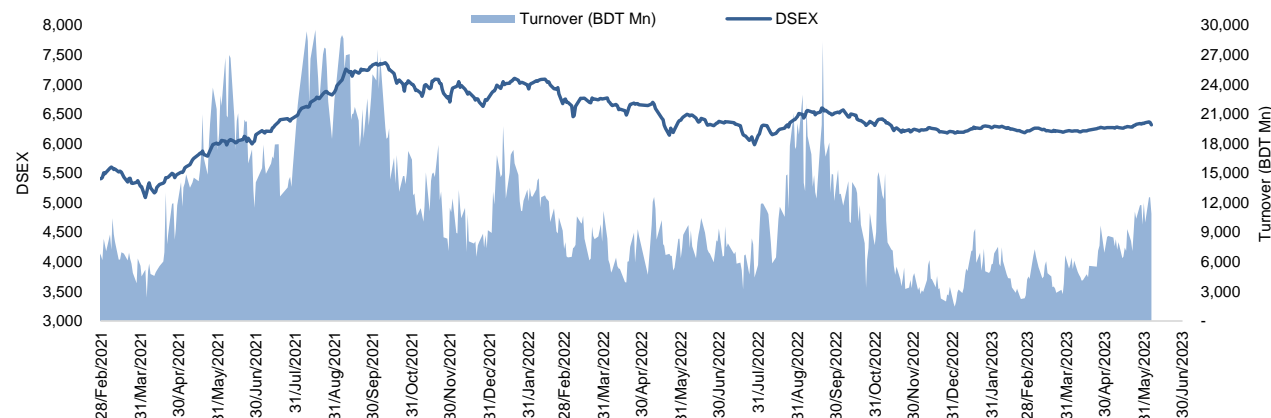


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.63%) lost 40.11 points and closed at 6,316.19. The blue-chip index DS30 (-0.43%), the Shariah-based index DSES (-0.72%), and the large-cap index CDSET (-0.22%) closed at 2,188.74, 1,372.29, and 1,211.50 points, respectively. All the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 0.50% followed by Fuel & Power (-0.46%), Pharmaceutical (-0.37%), Food & Allied (-0.24%), NBF1 (-0.09%), Bank (-0.06%), and Telecommunication (0.00%), respectively. Block trades contributed 5.9% of the overall market turnover. Associated Oxygen Limited (0.0%) was the most traded share with a turnover of BDT 529 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,316.19	6,356.30	-40.11	-0.63%	+1.8%
DS30	2,188.74	2,198.22	-9.48	-0.43%	-0.3%
DSES	1,372.29	1,382.29	-10.01	-0.72%	+1.0%
CDSET	1,211.50	1,214.23	-2.73	-0.22%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	25	157	179	361
A Category (Equity)	15	99	129	243
B Category (Equity)	9	46	44	99
N Category (Equity)	1	3	1	5
Z Category (Equity)	0	9	5	14
Mutual Funds	1	2	26	29
Corporate Bonds	0	0	5	5
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,717,110	7,740,339	-0.3%
	Mn USD	71,224	71,438	
Turnover	Mn BDT	10,869	12,567	-13.5%
	Mn USD	100	116	
Volume	Mn Shares	198	238	-17.1%
No. of Trade		228,231	254,906	-10.5%

* Average Interbank Exchange Rate is BDT 108.35 as of Jun 05, 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)

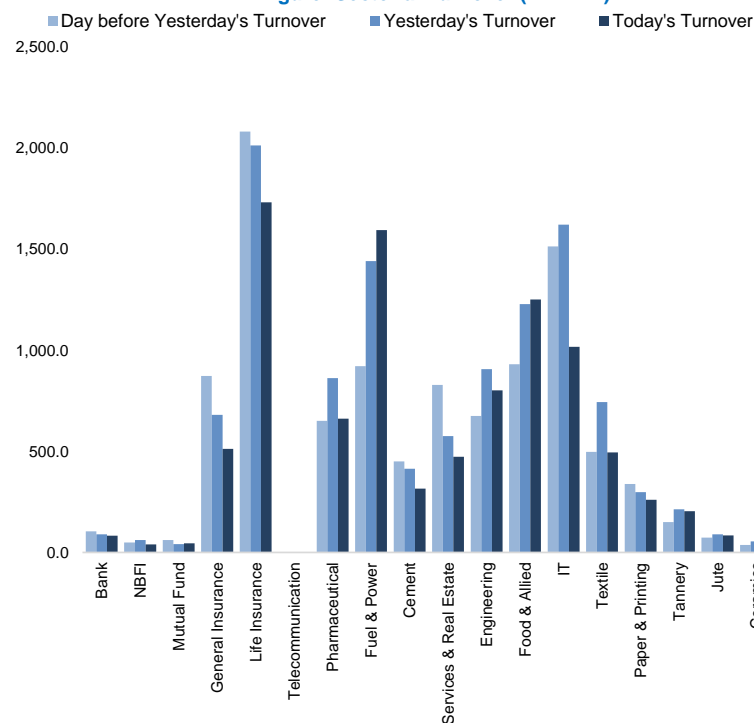
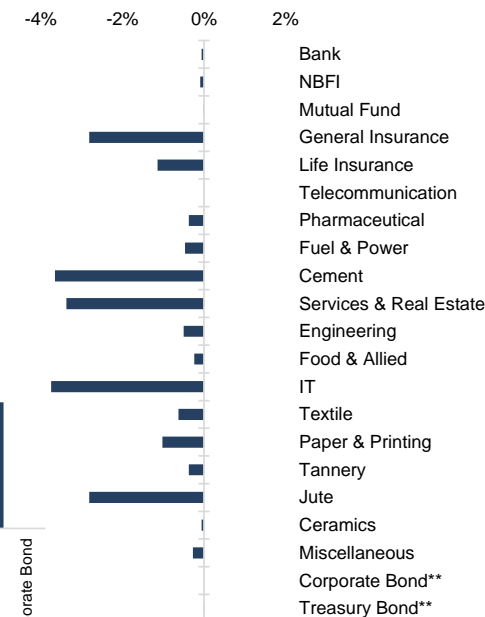


Figure: Sectorial Mcap Change



Market PE 18.4x

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	-0.84	-0.06%	35	680,100	9.0%	82.4	0.8%	11.8x	0.7x	GP	386,996	8.5%	0.9	13.0x	7.2x
NBFI	1,920	1,922	-1.78	-0.09%	23	186,860	2.5%	39.7	0.4%	NM	4.4x	WALTONHIL	317,378	7.0%	0.3	49.1x	3.2x
Mutual Fund	832	832	-0.07	-0.01%	37	37,643	0.5%	44.7	0.4%	NM	0.7x	BATBC	280,098	6.2%	1.3	15.3x	6.9x
General Insurance	3,340	3,437	-96.79	-2.82%	42	97,491	1.3%	512.8	5.0%	17.7x	1.5x	SQURPHARM/	185,977	4.1%	2.2	9.9x	1.7x
Life Insurance	3,051	3,086	-35.05	-1.14%	15	85,277	1.1%	1,731.5	16.9%	NM	NM	ROBI	157,138	3.5%	0.2	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.3	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.5	38.0x	4.6x
Pharmaceutical	3,695	3,709	-13.71	-0.37%	34	716,768	9.5%	662.2	6.5%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,706	1,714	-7.94	-0.46%	23	450,114	6.0%	1,594.8	15.6%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,554	2,651	-96.83	-3.65%	7	122,670	1.6%	315.1	3.1%	31.2x	2.7x	BERGERPBL	83,253	1.8%	0.5	27.7x	6.4x
Services & Real Est	1,976	2,045	-69.02	-3.37%	8	78,077	1.0%	472.6	4.6%	28.3x	1.0x	LHBL	78,973	1.7%	186.5	14.6x	4.0x
Engineering	4,514	4,537	-22.46	-0.50%	42	529,806	7.0%	801.4	7.8%	72.5x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,447	21,499	-51.71	-0.24%	21	396,853	5.3%	1,251.4	12.2%	19.9x	8.1x	BXPHARMA	65,222	1.4%	0.6	14.6x	1.5x
IT	3,353	3,484	-130.53	-3.75%	11	43,716	0.6%	1,016.4	9.9%	30.6x	3.2x	BRACBANK	57,596	1.3%	1.0	9.0x	0.9x
Textile	1,626	1,636	-10.23	-0.63%	58	170,260	2.3%	494.6	4.8%	83.9x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,758	10,869	-110.70	-1.02%	6	41,449	0.6%	260.2	2.5%	40.0x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.9x	0.8x
Tannery	3,238	3,250	-11.96	-0.37%	6	34,194	0.5%	204.4	2.0%	49.2x	3.4x	DUTCHBANGL	44,203	1.0%	0.1	7.6x	1.0x
Jute	15,162	15,601	-439.15	-2.81%	3	3,709	0.0%	83.9	0.8%	NM	#####	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	689	690	-0.39	-0.06%	5	31,885	0.4%	38.7	0.4%	48.8x	1.9x	UNILEVERCL	38,996	0.9%	16.4	44.3x	12.9x
Miscellaneous	4,172	4,184	-11.45	-0.27%	14	227,181	3.0%	623.4	6.1%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,390	0.5%	1.3	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	+0.00	+0.00%	252	2,981,539	39.6%	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
TILIL	59.6	+10.0%	5.9	NM	NM	SQURPHARMA	121,499	7.1%	9.9x	1.7x	AOL	36.5	-	529.5	23.4x	1.9x
NTC	488.2	+8.6%	19.0	NM	241.7x	BATBC	74,086	4.3%	15.3x	6.9x	INTRACO	49.7	-5.2%	485.4	33.0x	3.9x
MEGHNALIFE	116.6	+6.2%	471.1	NM	NM	BEXIMCO	69,196	4.0%	12.0x	1.2x	MEGHNALIFE	116.6	+6.2%	471.1	NM	NM
RUPALILIFE	217.4	+3.7%	318.1	NM	NM	RENATA	68,042	4.0%	38.0x	4.6x	RDFOOD	51.8	+1.6%	400.1	42.1x	3.2x
AIL	77.9	+3.5%	164.9	48.7x	3.4x	BXPHARMA	45,564	2.6%	14.6x	1.5x	BSC	126.1	-1.0%	349.5	8.0x	1.6x
STANCERAM	120.0	+3.1%	7.4	NM	51.5x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	RUPALILIFE	217.4	+3.7%	318.1	NM	NM
PF1STMF	10.3	+3.0%	19.2	NM	2x	GP	38,700	2.2%	13.0x	7.2x	LRBDL	35.4	-8.3%	287.4	16.2x	0.9x
BANGAS	133.0	+2.9%	55.2	NM	6.3x	BRACBANK	30,976	1.8%	9.0x	0.9x	GEMINISEA	857.0	-2.4%	274.0	40.9x	33.8x
BGIC	54.4	+1.9%	2.4	35.6x	2.8x	LHBL	26,980	1.6%	14.6x	4.0x	AGNISYSL	29.8	-9.1%	235.0	25.3x	1.9x
NLTUBES	85.4	+1.7%	84.9	NM	0.6x	EBL	24,998	1.5%	6.9x	0.9x	AAMRANET	75.3	-4.4%	200.9	19.7x	2.0x

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)
MIRAKHTER	54.0	-10.0%	79.1	22.2x	1.1x	RUPALILIFE	215.0	200.0	24.0	716	146.66
SIMTEX	23.5	-10.0%	43.2	25.8x	1x	AOL	36.1	32.9	40.0	1,576	53.01
MEGHNAPEP	39.1	-9.7%	5.2	NM	NM	IPDC	53.5	53.5	1.0	900	48.15
AGNISYSL	29.8	-9.1%	235.0	25.3x	1.9x	BRACBANK	32.3	32.3	4.0	1,051	33.94
AGRANINS	40.1	-8.7%	6.6	20.9x	2.0x	GP	261.7	261.6	17.0	112	29.37
BENGALWTL	27.8	-8.6%	61.8	56.7x	1.0x	BDFINANCE	44.1	44.1	1.0	600	26.46
UNIONINS	55.2	-8.5%	49.7	26.0x	3.2x	SQURPHARMA	205.2	204.6	18.0	77	15.86
LRBDL	35.4	-8.3%	287.4	16.2x	0.9x	SEAPPEARL	208.5	205.0	3.0	73	14.87
PARAMOUNT	49.4	-8.2%	27.8	28.2x	1.9x	GSPFINANCE	30.4	27.3	9.0	496	14.66
MIRACLEIND	29.8	-7.7%	28.7	NM	1.0x	ORIONPHARM	73.5	71.7	21.0	202	14.50

* 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
RUPALILIFE	215.0	200.0	146.7	716	24
AOL	36.1	32.9	53.0	1,576	40
IPDC	53.5	53.5	48.2	900	1
BRACBANK	32.3	32.3	33.9	1,051	4
GP	261.7	261.6	29.4	112	17
BDFINANCE	44.1	44.1	26.5	600	1
SQURPHARMA	205.2	204.6	15.9	77	18
SEAPEARL	208.5	205.0	14.9	73	3
GSPFINANCE	30.4	27.3	14.7	496	9
ORIONPHARM	73.5	71.7	14.5	202	21
SONALIPAPR	657.3	569.0	14.3	23	8
RDFOOD	52.3	48.5	11.3	226	7
ANWARGALV	210.0	194.7	10.5	54	14
AIL	75.1	73.2	9.9	134	10
BXPHARMA	145.5	140.0	8.9	62	6
SILVAPHL	21.5	19.5	8.0	394	9
BEACONPHAR	240.0	240.0	7.2	30	2
ACI	248.0	240.0	6.9	28	13
AAMRANET	80.1	79.0	6.2	78	5
INTRACO	49.0	48.0	6.1	125	3
KDSALTD	82.0	69.5	5.4	71	5
NAVANAPHAR	105.0	105.0	5.3	50	1
Total			636.0		378

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ILFSL		0.0%	0%	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

ILFSL

The Board of Directors has recommended No Dividend for the year ended December 31, 2022. Date of AGM: 17.07.2023, Time: 10:00 AM, Venue: Digital Platform. Record Date: 26.06.2023. The Company has also reported Consolidated EPS of Tk. (8.05), Consolidated NAV per share of Tk. (162.24) and Consolidated NOCFPS of Tk. (1.43) for the year ended December 31, 2022 as against Tk. (9.26), Tk. (154.19) and NOCFPS of Tk. (1.51) respectively for the year ended December 31, 2021.

SONALIANS

(Q3 Un-audited): EPS was Tk. 0.30 for January-March 2023 as against Tk. 1.78 for January-March 2022; EPS was Tk. 1.32 for July 2022-March 2023 as against Tk. 3.05 for July 2021-March 2022. NOCFPS was Tk. 12.51 for July 2022-March 2023 as against Tk. 18.80 for July 2021-March 2022. NAV per share was Tk. 115.61 as on March 31, 2023 and Tk. 228.71 as on March 31, 2022.

BRACBANK

Mr. Asif Saleh, a Nominated Director (Nominated by BRAC) of the Company, has expressed his intention to buy 30,800 shares of the company at prevailing market price (in the Public/Block Market) through Dhaka Stock Exchange Limited within next 30 working days.

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