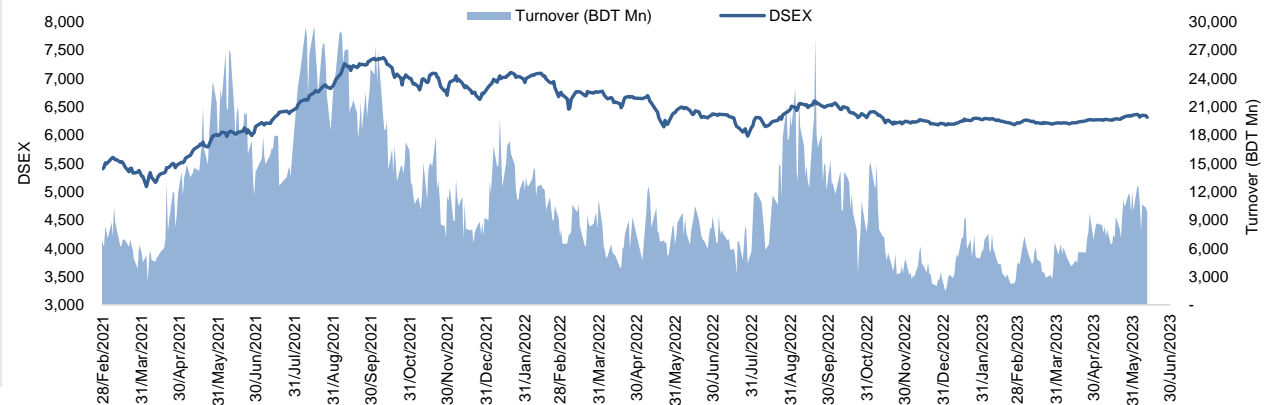


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.49%) lost 30.98 points and closed at 6,310.60. The blue-chip index DS30 (-0.26%), the Shariah-based index DSES (-0.41%), and the large-cap index CDSET (-0.07%) closed at 2,185.40, 1,372.07, and 1,210.78 points, respectively. All the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.24% followed by Fuel & Power (-0.22%), Food & Allied (-0.15%), Engineering (-0.14%), NBFi (-0.07%), Bank (-0.06%), and Telecommunication (0.00%), respectively. Block trades contributed 6.7% of the overall market turnover. Meghna Life Insurance Co. Ltd. (-9.5%) was the most traded share with a turnover of BDT 503 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,310.60	6,341.58	-30.98	-0.49%	+1.7%
DS30	2,185.40	2,190.98	-5.59	-0.26%	-0.5%
DSES	1,372.07	1,377.66	-5.59	-0.41%	+1.0%
CDSET	1,210.78	1,211.57	-0.79	-0.07%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	32	142	180	354
A Category (Equity)	18	92	128	238
B Category (Equity)	10	41	46	97
N Category (Equity)	1	3	1	5
Z Category (Equity)	3	6	5	14
Mutual Funds	2	0	27	29
Corporate Bonds	0	2	1	3
Treasury Bonds	0	1	0	1

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,711,476	7,728,269	-0.2%
	Mn USD	70,943	71,097	-0.2%
Turnover	Mn BDT	9,814	10,306	-4.8%
	Mn USD	90	95	-4.8%
Volume	Mn Shares	155	162	-4.2%
	No. of Trade	254,942	268,292	-5.0%

\* Average Interbank Exchange Rate is BDT 108.70 as of Jun 11, 2023

<b>Fahim Hassan</b> Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	<b>HZ Towhidi Khan</b> Senior Research Associate (880) 1708805224 hztowhidi.khan@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

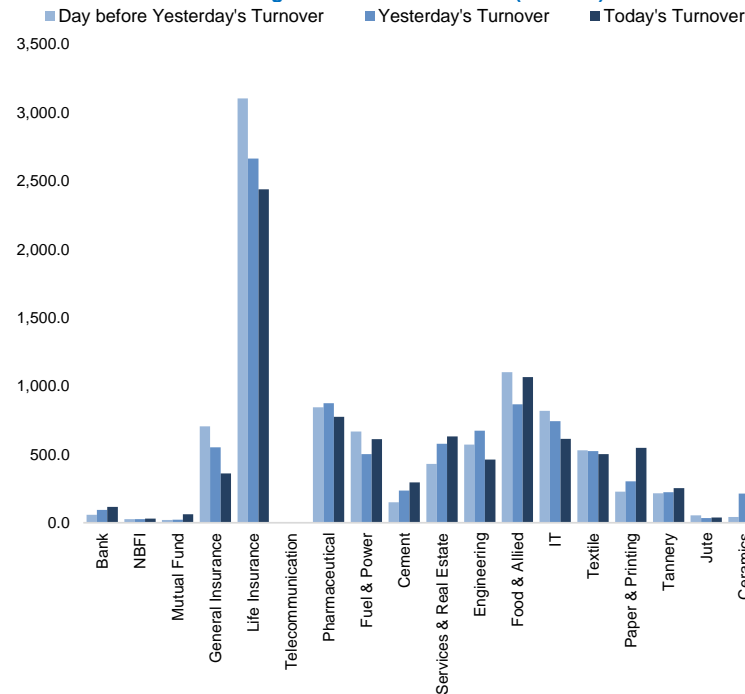
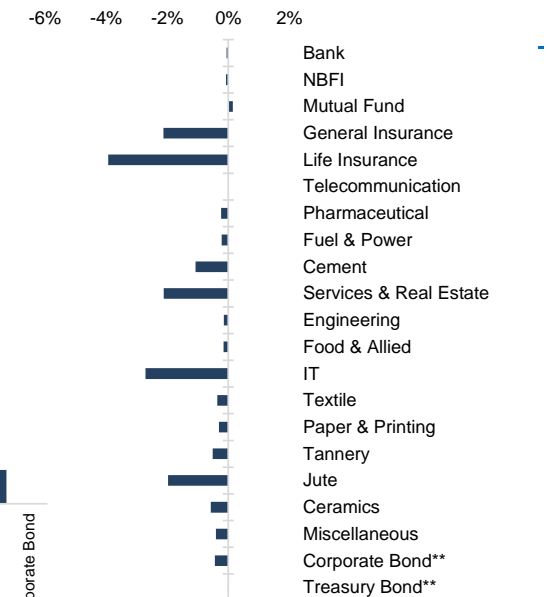


Figure: Sectorial Mcap Change



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	-0.81	-0.06%	35	680,152	9.0%	115.8	1.3%	11.8x	0.7x	GP	386,996	8.5%	0.6	13.0x	7.2x
NBFI	1,920	1,921	-1.41	-0.07%	23	186,797	2.5%	31.3	0.3%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	830	+1.26	+0.15%	37	37,603	0.5%	61.5	0.7%	NM	0.7x	BATBC	280,098	6.2%	1.2	15.3x	6.9x
General Insurance	3,326	3,398	-71.97	-2.12%	42	97,061	1.3%	361.3	3.9%	17.6x	1.5x	SQURPHARMA	185,977	4.1%	6.7	9.9x	1.7x
Life Insurance	3,100	3,227	-126.57	-3.92%	15	86,654	1.2%	2,439.4	26.6%	NM	NM	ROBI	157,138	3.5%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.7	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.2	38.0x	4.6x
Pharmaceutical	3,700	3,709	-8.76	-0.24%	34	717,696	9.5%	774.5	8.5%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,705	1,709	-3.69	-0.22%	23	449,802	6.0%	612.5	6.7%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,507	2,534	-27.14	-1.07%	7	120,413	1.6%	296.1	3.2%	30.6x	2.6x	BERGERPBL	81,991	1.8%	2.8	27.2x	6.3x
Services & Real Esta	1,991	2,034	-42.88	-2.11%	8	78,667	1.0%	631.1	6.9%	28.5x	1.0x	LHBL	77,231	1.7%	222.4	14.3x	3.9x
Engineering	4,508	4,514	-6.54	-0.14%	42	529,054	7.0%	461.4	5.0%	72.4x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,500	21,533	-33.09	-0.15%	21	397,838	5.3%	1,066.1	11.6%	20.0x	8.1x	BXPHARMA	65,222	1.4%	14.7	14.6x	1.5x
IT	3,205	3,294	-89.12	-2.71%	11	41,783	0.6%	613.2	6.7%	29.2x	3.0x	BRACBANK	57,596	1.3%	0.1	9.0x	0.9x
Textile	1,623	1,629	-5.88	-0.36%	58	169,959	2.3%	501.6	5.5%	83.7x	1.1x	BEACONPHAR	56,595	1.2%	0.1	80.9x	9.2x
Paper & Printing	10,882	10,915	-33.08	-0.30%	6	41,926	0.6%	547.7	6.0%	40.4x	2.1x	ISLAMIBANK	52,486	1.2%	0.8	8.9x	0.8x
Tannery	3,255	3,272	-16.79	-0.51%	6	34,378	0.5%	252.4	2.8%	49.5x	3.4x	DUTCHBANGL	44,203	1.0%	0.1	7.6x	1.0x
Jute	14,427	14,716	-289.20	-1.97%	3	3,529	0.0%	38.1	0.4%	NM	-1225.1x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	697	701	-3.98	-0.57%	5	32,218	0.4%	103.0	1.1%	49.3x	1.9x	UNILEVERCL	39,507	0.9%	6.6	44.9x	13.1x
Miscellaneous	4,143	4,160	-16.88	-0.41%	14	225,583	3.0%	248.2	2.7%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	89	-0.39	-0.44%	9	36,380	0.5%	0.8	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	-0.01	-0.01%	252	2,980,195	39.6%	5.0	0.1%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PAPERPROC	284.6	+8.2%	310.9	57.7x	8.4x
MEGCONMILK	30.8	+6.9%	5.3	20.8x	NM
CAPMIBBLMF	13.9	+5.3%	12.7	NM	1.5x
GQBALLPEN	124.1	+5.3%	48.0	NM	1.0x
APEXFOODS	432.0	+4.4%	122.0	43.5x	3.4x
TILIL	82.5	+4.2%	201.0	NM	NM
1STPRIMFMF	14.7	+3.5%	8.9	NM	1x
STYLECRAFT	99.3	+3.2%	20.2	NM	6.2x
SAMATALETH	70.5	+3.2%	19.0	NM	4.9x
MEGHNAPE	40.5	+3.1%	3.7	NM	NM

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MEGHNALIFE	106.7	-9.5%	502.8	NM	NM
INTRACO	45.7	-9.0%	359.0	30.4x	4x
SIMTEX	20.7	-8.8%	18.0	22.7x	0.9x
RUPALILIFE	199.5	-8.7%	385.3	NM	NM
PRAGATILIF	132.3	-8.7%	107.4	NM	NM
LEGACYFOOT	114.7	-8.2%	160.2	NM	12.8x
NAVANAPHAR	108.3	-7.5%	337.6	24.6x	2.6x
SKTRIMS	28.4	-6.6%	40.1	25.1x	1.8x
YPL	24.2	-6.6%	110.4	NM	4.5x
RDFOOD	50.8	-6.4%	298.2	41.3x	3.2x

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%	14.3x	3.9x
EBL	24,998	1.5%	6.9x	0.9x
OLYMPIC	19,683	1.1%	18.4x	3.0x
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%	30.8x	12.3x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	15,220	0.9%	16.1x	1.1x
PRIMEBANK	14,248	0.8%	5.5x	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
MEGHNALIFE	106.7	-9.5%	502.8	NM	NM
SEAPEARL	212.6	-2.3%	396.2	30.8x	12.3x
RUPALILIFE	199.5	-8.7%	385.3	NM	NM
INTRACO	45.7	-9.0%	359.0	30.4x	3.6x
NAVANAPHAR	108.3	-7.5%	337.6	24.6x	2.6x
SONALILIFE	106.1	+0.6%	316.1	NM	NM
PAPERPROC	284.6	+8.2%	310.9	57.7x	8.4x
RDFOOD	50.8	-6.4%	298.2	41.3x	3.2x
FAREASTLIF	87.6	-2.1%	297.7	NM	NM
LHBL	66.5	-0.9%	222.4	14.3x	3.9x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
GP	261.6	261.6	14.0	234	61.12
RDFOOD	59.6	51.0	6.0	1,051	59.69
DELTALIFE	155.0	155.0	2.0	322	49.91
SEAPEARL	236.0	200.0	9.0	235	49.47
MERCANBANK	13.3	13.3	1.0	2,625	34.91
AIL	84.9	75.7	5.0	455	34.66
SQURPHARMA	206.5	201.2	43.0	155	31.67
RUPALILIFE	215.0	199.5	4.0	156	31.42
BEACONPHAR	223.7	223.7	1.0	127	28.41
BSC	132.0	132.0	1.0	200	26.40

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
GP	261.6	261.6	61.1	234	14
RDFOOD	59.6	51.0	59.7	1,051	6
DELTALIFE	155.0	155.0	49.9	322	2
SEAPEARL	236.0	200.0	49.5	235	9
MERCANBANK	13.3	13.3	34.9	2,625	1
AIL	84.9	75.7	34.7	455	5
SQURPHARMA	206.5	201.2	31.7	155	43
RUPALILIFE	215.0	199.5	31.4	156	4
BEACONPHAR	223.7	223.7	28.4	127	1
BSC	132.0	132.0	26.4	200	1
EMERALDOIL	140.5	120.0	16.6	127	4
ADVENT	30.0	30.0	15.0	500	1
LINDEBD	1,390.0	1,390.0	13.9	10	1
BXPBARMA	146.1	136.3	13.5	94	12
FIRSTSBANK	9.2	8.4	9.2	1,029	3
BPML	74.0	74.0	9.0	122	2
LRBDL	38.1	31.6	7.6	238	12
AAMRANET	73.0	73.0	7.3	100	1
UNIQUEHRL	78.5	74.0	7.0	93	2
GSPFINANCE	29.2	27.7	6.9	243	3
NAVANAPHAR	115.0	107.5	6.4	58	5
DSSL	15.3	15.3	6.1	400	2
<b>Total</b>			<b>652.7</b>		<b>246</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
EMERALDOIL		0.0%	5%	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

##### EMERALDOIL

**(Q2 Un-audited):** The Company has informed that they previously submitted wrong EPS and NOCFPS of Q2 financials. Revised Q2 financials are as follows: EPS was Tk. 0.19 for October-December 2022 as against Tk. (0.11) for October-December 2021. EPS was Tk. 0.41 for July-December 2022 as against Tk. (0.26) for July-December 2021. NOCFPS was Tk. (0.78) for July-December 2022 as against Tk. (0.78) for July-December 2021. NAV per share was Tk. (10.37) as on December 31, 2022 and Tk. (12.85) as on June 30, 2022.

**(Q3 Un-audited):** The Company has informed that they previously submitted wrong EPS, NAVPS and NOCFPS figures of Q3 financials. Revised Q3 financials are as follows: EPS was Tk. 0.17 for January-March 2023 as against Tk. (0.14) for January-March 2022. EPS was Tk. 0.58 for July 2022-March 2023 as against Tk. (0.36) for July 2021-March 2022. NOCFPS was Tk. (0.87) for July 2022-March 2023 as against Tk. (2.14) for July 2021-March 2022. NAV per share was Tk. (10.20) as on March 31, 2023 and Tk. (12.85) as on June 30, 2022.

##### NAVANAPHAR

The company has informed that the Board of Directors has decided to issue an unsecured partially convertible and redeemable bond of TK. 150.00 crore (Taka One Fifty Crore) for 5 years through Private Offer in order to refinance the existing bank loan of the company subject to approval from the shareholders of the company in EGM, and Bangladesh Securities and Exchange commission. The coupon rate of this convertible bond shall be floating on semiannual basis. Date of EGM: 31.07.2023. Time: 12:00 Noon. Record date: 05.07.2023. Venue: Digital platform.

##### PADMALIFE

The company has informed that Insurance Development and Regulatory Authority (IDRA) has appointed Mr. Md. Jahangir Alam, Director, IDRA as Observer to the Board of Directors of the Company to protect the interest of policy holders and to ensure good governance of the Company. IDRA stated that policyholders are constantly filing complaints with IDRA due to non-payment of insurance claims on time by Padma Islami Life Insurance Limited.

##### AL-HAJTEX

BSEC has nominated or appointed following 4 (four) distinguished individuals as new Independent Directors of the company: 1. Mr. Syed Tariquzzaman, Executive Director (Retired), Bangladesh Bank; 2. Mr. Md Salim, Senior Faculty Member, Bangladesh Academy for Securities Markets; 3. Dr. Muhamad Saifuddin Khan, Associate Professor, Department of Finance, University of Dhaka; 4. Mr. Fahmid Wasik Ali, FCMA, Country CFO, NOVARTIS. Moreover, BSEC has withdrawn the nomination of Mr. Khondoker Kamaluzzaman, Mr. Md. Zikrul Hoque and Dr. AFM Abdul Moyeen with effect from June 05, 2023.

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