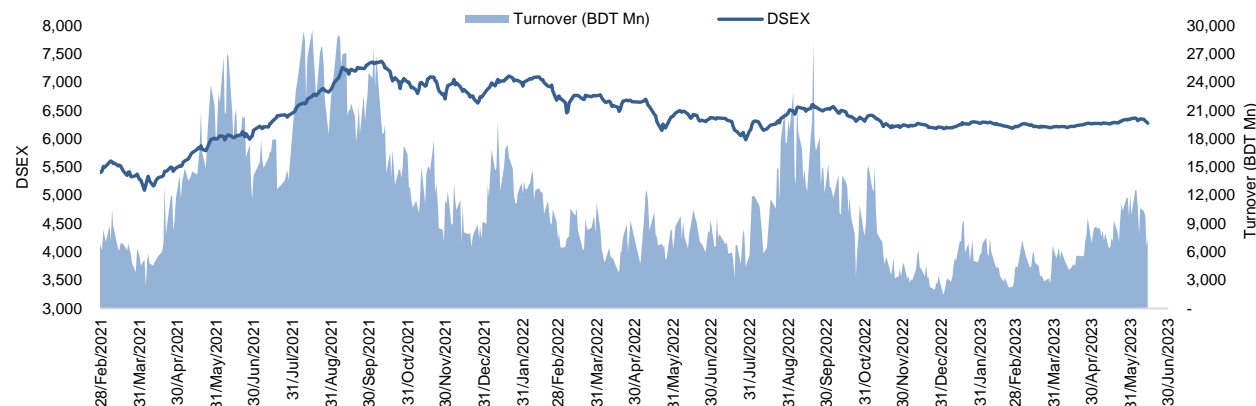


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.38%) lost 24.16 points and closed at 6,274.76. The blue-chip index DS30 (-0.20%), the Shariah-based index DSES (-0.37%), and the large-cap index CDSET (-0.06%) closed at 2,181.08, 1,364.14, and 1,208.12 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.18% followed by Fuel & Power (-0.15%), Pharmaceutical (-0.07%), NBFi (-0.04%), Bank (-0.04%), Engineering (-0.02%), and Telecommunication (0.00%), respectively. Block trades contributed 8.0% of the overall market turnover. Navana Pharmaceuticals Limited (+0.4%) was the most traded share with a turnover of BDT 449 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,274.76	6,298.92	-24.16	-0.38%	+1.1%
DS30	2,181.08	2,185.50	-4.42	-0.20%	-0.6%
DSES	1,364.14	1,369.20	-5.06	-0.37%	+0.4%
CDSET	1,208.12	1,208.90	-0.78	-0.06%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	46	119	173	338
A Category (Equity)	23	80	123	226
B Category (Equity)	17	32	44	93
N Category (Equity)	1	3	1	5
Z Category (Equity)	5	4	5	14
Mutual Funds	0	3	18	21
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,705,113	7,706,731	-0.0%
	Mn USD	70,884	70,899	
Turnover	Mn BDT	7,233	6,691	+8.1%
	Mn USD	67	62	
Volume	Mn Shares	118	114	+2.9%
No. of Trade		177,485	170,641	+4.0%

\* Average Interbank Exchange Rate is BDT 108.70 as of Jun 13, 2023

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Figure: Sectorial Turnover (BDT Mn)

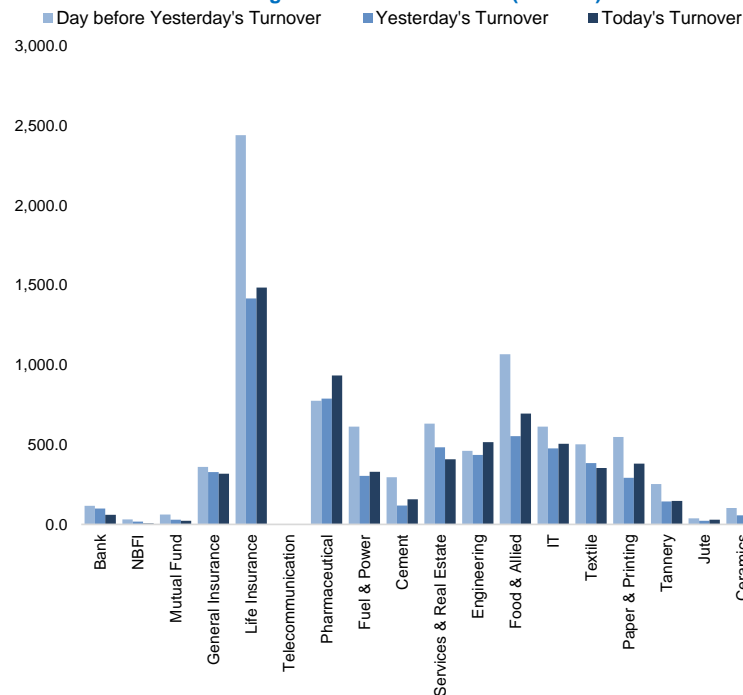
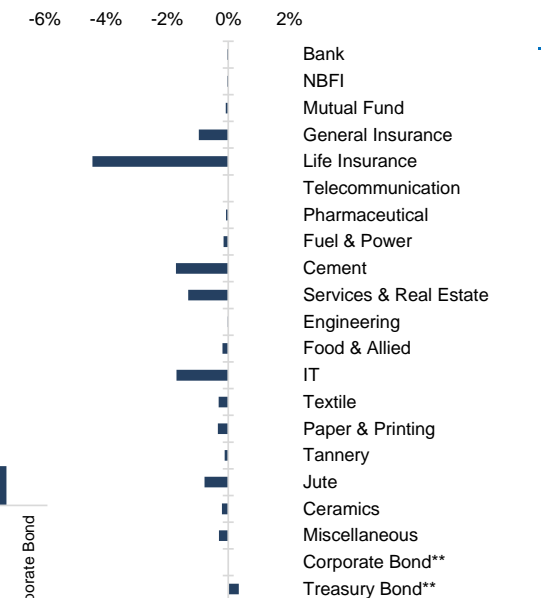


Figure: Sectorial Mcap Change



Market PE 18.3x

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	1,438	1,439	-0.57	-0.04%	35	677,977	9.0%	60.6	0.9%	11.8x	0.7x	GP	386,996	8.5%	0.1	13.0x	7.2x
NBFI	1,918	1,919	-0.77	-0.04%	23	186,653	2.5%	5.3	0.1%	NM	4.4x	WALTONHIL	317,378	7.0%	0.1	49.1x	3.2x
Mutual Fund	831	831	-0.71	-0.09%	37	37,563	0.5%	23.2	0.3%	NM	0.7x	BATBC	280,098	6.2%	0.5	15.3x	6.9x
General Insurance	3,242	3,273	-31.38	-0.96%	42	94,622	1.3%	318.6	4.8%	17.3x	1.5x	SQURPHARMA	185,977	4.1%	4.6	9.9x	1.7x
Life Insurance	2,908	3,043	-135.26	-4.44%	15	81,280	1.1%	1,484.3	22.3%	NM	NM	ROBI	157,138	3.5%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.2	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,703	3,705	-2.54	-0.07%	34	718,251	9.5%	934.1	14.0%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,702	1,704	-2.53	-0.15%	23	448,909	6.0%	329.5	4.9%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,463	2,506	-42.85	-1.71%	7	118,296	1.6%	157.7	2.4%	30.1x	2.6x	BERGERPBL	82,117	1.8%	0.6	27.3x	6.3x
Services & Real Esta	1,979	2,005	-26.30	-1.31%	8	78,178	1.0%	408.0	6.1%	28.3x	1.0x	LHBL	76,302	1.7%	116.3	14.1x	3.8x
Engineering	4,507	4,508	-0.84	-0.02%	42	529,016	7.0%	516.2	7.8%	72.4x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,443	21,483	-39.60	-0.18%	21	396,777	5.3%	695.7	10.4%	19.9x	8.1x	BXPHARMA	65,222	1.4%	0.3	14.6x	1.5x
IT	3,170	3,224	-54.47	-1.69%	11	41,325	0.5%	505.7	7.6%	28.9x	3.0x	BRACBANK	57,596	1.3%	0.6	9.0x	0.9x
Textile	1,618	1,623	-5.12	-0.32%	58	169,392	2.3%	352.9	5.3%	83.5x	1.1x	BEACONPHAR	56,595	1.3%	0.1	80.9x	9.2x
Paper & Printing	10,787	10,824	-37.20	-0.34%	6	41,561	0.6%	381.0	5.7%	40.1x	2.1x	ISLAMIBANK	52,486	1.2%	0.3	8.9x	0.8x
Tannery	3,256	3,260	-3.93	-0.12%	6	34,390	0.5%	146.7	2.2%	49.5x	3.4x	DUTCHBANGL	44,203	1.0%	0.0	7.6x	1.0x
Jute	14,214	14,325	-110.93	-0.77%	3	3,477	0.0%	28.7	0.4%	NM	-1207.1x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	694	695	-1.43	-0.21%	5	32,078	0.4%	61.3	0.9%	49.1x	1.9x	UNILEVERCL	39,520	0.9%	4.3	44.9x	13.1x
Miscellaneous	4,132	4,144	-12.75	-0.31%	14	224,955	3.0%	246.1	3.7%	15.9x	1.8x	POWERGRID	37,347	0.8%	0.1	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,380	0.5%	2.3	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	94	93	+0.32	+0.34%	252	2,990,021	39.8%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AZIZPIPES	106.7	+10.0%	67.7	NM	NM
MEGCONMILK	33.0	+10.0%	10.6	22.3x	NM
MEGHNA PET	44.1	+10.0%	18.5	NM	NM
KPPL	11.3	+9.7%	57.0	NM	NM
IMAMBUTTON	111.9	+7.0%	12.8	NM	23.3x
SHYAMPSUG	95.1	+6.4%	4.9	NM	NM
APEXTANRY	112.8	+5.4%	6.3	NM	2x
YPL	27.0	+4.2%	129.5	NM	5.0x
PAPERPROC	290.6	+3.2%	188.6	58.9x	8.6x
DESHBANDHU	20.5	+3.0%	30.5	58.6x	1.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SONALILIFE	95.3	-9.9%	204.1	NM	NM
UNIONINS	51.1	-9.4%	55.2	24.7x	3x
MEGHNALIFE	95.7	-9.2%	369.5	NM	NM
GLOBALINS	31.2	-8.8%	13.7	20.1x	2.2x
PRIMELIFE	65.1	-8.7%	37.7	NM	NM
PROGRESLIF	85.9	-8.1%	22.0	NM	NM
CLICL	75.9	-7.6%	73.8	NM	NM
TILIL	71.1	-7.4%	115.5	NM	NM
TOSRIFA	26.2	-7.4%	20.4	14.4x	0.9x
FAREASTLIF	78.2	-7.2%	171.8	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%	14.1x	3.8x
EBL	24,998	1.5%	6.9x	0.9x
OLYMPIC	19,683	1.1%	18.3x	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
SEAPPEARL	16,847	1.0%	32.2x	12.9x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	15,220	0.9%	14.8x	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
NAVANAPHAR	118.7	+0.4%	448.6	27.0x	2.9x
MEGHNALIFE	95.7	-9.2%	369.5	NM	NM
ADVENT	29.7	+2.4%	258.6	28.0x	2.0x
RUPALILIFE	187.4	-6.7%	230.1	NM	NM
SEAPPEARL	222.3	-0.3%	222.9	32.2x	12.9x
SONALILIFE	95.3	-9.9%	204.1	NM	NM
PAPERPROC	290.6	+3.2%	188.6	58.9x	8.6x
FAREASTLIF	78.2	-7.2%	171.8	NM	NM
INTRACO	44.5	-5.3%	171.6	29.6x	3.5x
RDFOOD	49.8	-2.9%	144.2	40.5x	3.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BSC	125.0	125.0	1.0	798	99.75
RUPALILIFE	190.2	185.0	10.0	480	89.22
IPDC	53.5	53.5	1.0	935	50.02
LHBL	72.1	60.4	3.0	381	27.32
BEACONPHAR	245.0	245.0	4.0	100	24.50
BXPHARMA	146.2	142.0	10.0	136	19.84
SQURPHARMA	206.0	204.3	24.0	76	15.61
SIMTEX	22.0	22.0	1.0	600	13.20
AAMRANET	72.0	70.0	2.0	172	12.18
RDFOOD	55.6	48.5	3.0	245	12.02

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BSC	125.0	125.0	99.8	798	1
RUPALILIFE	190.2	185.0	89.2	480	10
IPDC	53.5	53.5	50.0	935	1
LHBL	72.1	60.4	27.3	381	3
BEACONPHAR	245.0	245.0	24.5	100	4
BXPHERMA	146.2	142.0	19.8	136	10
SQURPHARMA	206.0	204.3	15.6	76	24
SIMTEX	22.0	22.0	13.2	600	1
AAMRANET	72.0	70.0	12.2	172	2
RDFOOD	55.6	48.5	12.0	245	3
CITYBANK	21.2	21.0	11.0	518	11
BRACBANK	32.3	32.3	10.7	331	3
GP	286.6	261.6	10.1	36	8
CNATEX	9.5	9.3	9.8	1,051	4
BPML	80.0	80.0	9.7	122	2
AOL	34.4	33.0	8.4	245	4
GEMINISEA	872.0	831.0	7.8	9	2
MARICO	2,361.0	2,356.0	7.6	3	4
ADNTEL	135.3	135.3	6.8	50	1
RENATA	1,217.9	1,141.8	6.5	6	5
FIRSTSBANK	8.9	8.3	6.0	677	2
IFIC	11.1	11.1	5.8	525	1
<b>Total</b>			<b>575.4</b>		<b>204</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
SONARBAINS		5.0%	10%	Record Date	20-Jul-23
UNIONINS		0.0%	10%	Record Date	23-Jul-23
EIL		0.0%	7%	Record Date	24-Jul-23

**Important DSE News**
**SONARBAINS**

The Board of Directors has recommended 10% cash and 5% stock dividend for the year ended December 31, 2022. Date of AGM: 21.09.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 20.07.2023. The Company has also reported Consolidated EPS of Tk. 2.03, Consolidated NAV per share of Tk. 21.93 and Consolidated NOCFPS of Tk. 2.97 for the year ended December 31, 2022 as against Tk. 2.05, Tk. 21.10 and Tk. 2.77 respectively for the year ended December 31, 2021.

**(Q1 Un-audited):** Consolidated EPS was Tk. 0.85 for January-March 2023 as against Tk. 0.82 for January-March 2022. Consolidated NOCFPS was Tk. 0.32 for January-March 2023 as against Tk. 2.81 for January-March 2022. Consolidated NAV per share was Tk. 22.83 as on March 31, 2023 and Tk. 21.93 as on March 31, 2022.

**UNIONINS**

The Board of Directors has recommended 10% cash dividend for the year ended December 31, 2022. Date of AGM: 20.09.2023, Time: 12:00 PM, Venue: Digital Platform. Record Date: 23.07.2023. The Company has also reported EPS of Tk. 1.77, NAV per share of Tk. 16.66 and NOCFPS of Tk. 1.33 for the year ended December 31, 2022 as against Tk. 1.58, Tk. 15.39 and Tk. 2.06 respectively for the year ended December 31, 2021.

**(Q1 Un-audited):** EPS was Tk. 0.89 for January-March 2023 as against Tk. 0.59 for January-March 2022. NOCFPS was Tk. 0.82 for January-March 2023 as against Tk. 0.76 for January-March 2022. NAV per share was Tk. 17.45 as on March 31, 2023 and Tk. 16.66 as on December 31, 2022.

**POWERGRID**

The company has informed that that Board of Directors of the company has decided to hold an EGM to approve the following special resolutions:

**Increase of Authorised Share Capital:** The authorised share capital of the company will be increased from existing BDT 100 Bn (BDT 10 each share) to BDT 150 Bn consisting of 130 Bn Preference shares and BDT 20 Bn Ordinary shares subject to the approval of the shareholders in the EGM.

**Issuance of Ordinary and Preference share:** To issue 20,10,80,000 ordinary share of face value of BDT 10 each with a premium of BDT 10 of BDT 4,021,600,000 and 7,641,106,023 Irredeemable and Noncumulative Preference Share of face value of BDT 10 each of BDT 76,411,060,230 for total of BDT 80,432,660,230 in favor of Secretary, Power Division subject to the consent of the Bangladesh Securities and Exchange Commission (BSEC) against the Government Equity already given to the different projects of the company. Date of EGM: 02.09.2023, Time: 10:00 AM and Venue: Digital Platform. Record date for EGM: 13.07.2023.

**MARICO**

The Company has informed that the Board of Directors has approved the appointment of Mr. Shafiq Musharraf, FCA as Chief Financial Officer of the company with effect from June 13, 2023.

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