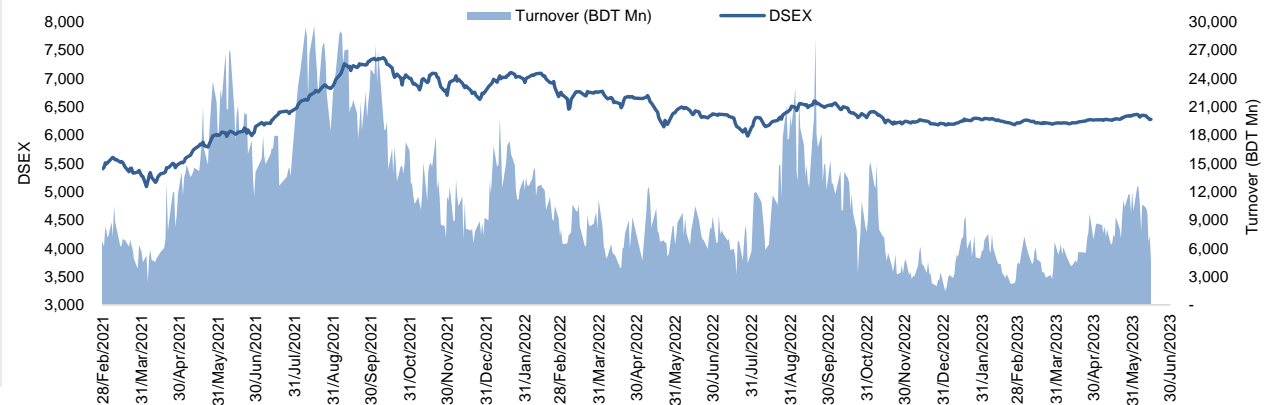


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.08%) gained 5.26 points and closed at 6,280.02. The blue-chip index DS30 (+0.07%), the Shariah-based index DSES (+0.08%), and the large-cap index CDSET (+0.05%) closed at 2,182.50, 1,365.17, and 1,208.75 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.18% followed by Bank (+0.04%), NBFI (+0.01%). Fuel & Power experienced the highest loss of 0.06% followed by Pharmaceutical (-0.05%), Engineering (-0.03%). Block trades contributed 9.7% of the overall market turnover. Bangladesh Shipping Corporation (+2.5%) was the most traded share with a turnover of BDT 236 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,280.02	6,274.76	+5.26	+0.08%	+1.2%
DS30	2,182.50	2,181.08	+1.42	+0.07%	-0.6%
DSES	1,365.17	1,364.14	+1.03	+0.08%	+0.5%
CDSET	1,208.75	1,208.12	+0.63	+0.05%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	89	64	187	340
A Category (Equity)	55	41	134	230
B Category (Equity)	26	18	46	90
N Category (Equity)	1	3	1	5
Z Category (Equity)	7	2	6	15
Mutual Funds	0	1	25	26
Corporate Bonds	1	0	4	5
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,695,292	7,705,113	-0.1%
	Mn USD	70,915	71,005	
Turnover	Mn BDT	4,651	7,233	-35.7%
	Mn USD	43	67	
Volume	Mn Shares	79	118	-33.1%
No. of Trade		127,375	177,485	-28.2%

\* Average Interbank Exchange Rate is BDT 108.52 as of Jun 14, 2023

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Figure: Sectorial Turnover (BDT Mn)

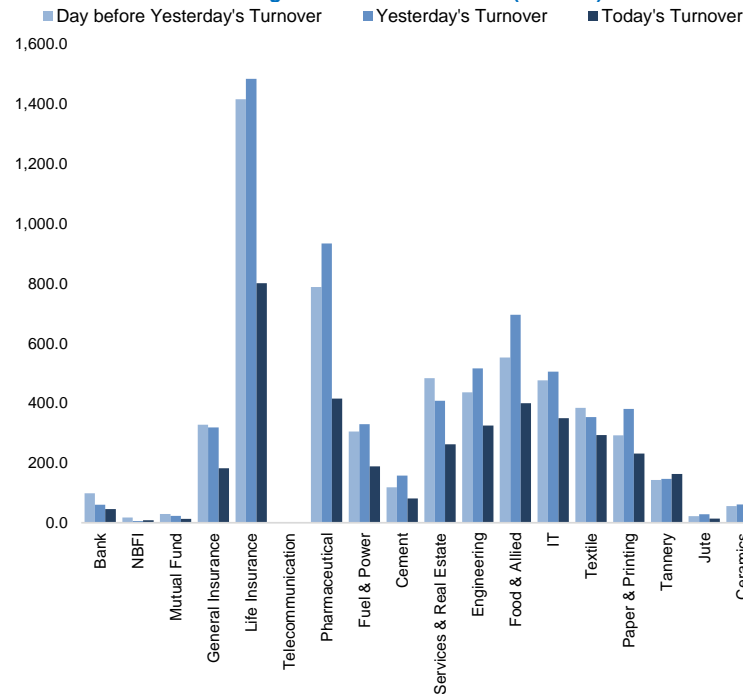
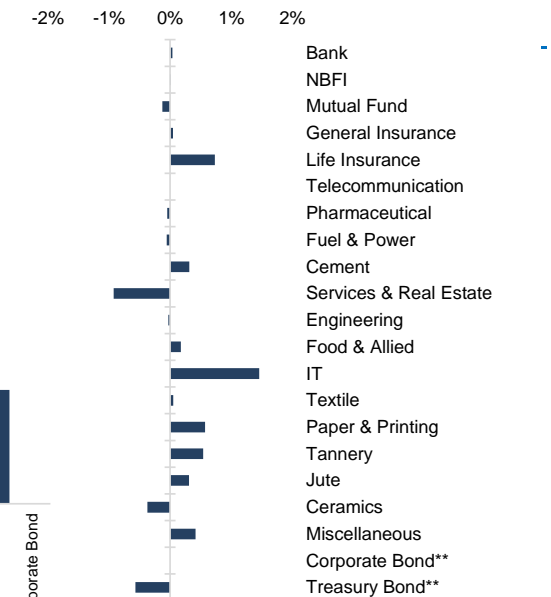


Figure: Sectorial Mcap Change



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	1,439	1,438	+0.57	+0.04%	35	678,245	9.0%	46.2	1.1%	11.8x	0.7x	GP	386,996	8.5%	1.6	13.0x	7.2x
NBFI	1,918	1,918	+0.18	+0.01%	23	186,670	2.5%	8.3	0.2%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	830	831	-1.03	-0.12%	37	37,516	0.5%	13.4	0.3%	NM	0.7x	BATBC	280,098	6.2%	0.7	15.3x	6.9x
General Insurance	3,243	3,242	+1.48	+0.05%	42	94,665	1.3%	182.4	4.3%	17.3x	1.5x	SQURPHARM <sup>A</sup>	185,977	4.1%	2.9	9.9x	1.7x
Life Insurance	2,929	2,908	+21.30	+0.73%	15	81,876	1.1%	801.2	19.1%	NM	NM	ROBI	157,138	3.5%	0.0	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.6	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.7	38.0x	4.6x
Pharmaceutical	3,701	3,703	-1.72	-0.05%	34	717,918	9.6%	415.1	9.9%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,701	1,702	-0.94	-0.06%	23	448,661	6.0%	188.2	4.5%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,471	2,463	+7.70	+0.31%	7	118,666	1.6%	81.3	1.9%	30.2x	2.6x	BERGERPBL	82,469	1.8%	2.1	27.4x	6.4x
Services & Real Esta	1,961	1,979	-18.24	-0.92%	8	77,457	1.0%	262.0	6.2%	28.0x	1.0x	LHBL	77,115	1.7%	49.0	14.2x	3.9x
Engineering	4,506	4,507	-1.34	-0.03%	42	528,859	7.0%	325.4	7.8%	72.3x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,481	21,443	+37.66	+0.18%	21	397,474	5.3%	400.1	9.5%	20.0x	8.1x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,216	3,170	+46.18	+1.46%	11	41,927	0.6%	349.8	8.3%	29.3x	3.0x	BRACBANK	57,596	1.3%	0.0	9.0x	0.9x
Textile	1,619	1,618	+0.80	+0.05%	58	169,477	2.3%	293.2	7.0%	83.5x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,849	10,787	+61.77	+0.57%	6	41,799	0.6%	231.6	5.5%	40.3x	2.1x	ISLAMIBANK	52,486	1.2%	0.0	8.9x	0.8x
Tannery	3,274	3,256	+17.56	+0.54%	6	34,575	0.5%	163.1	3.9%	49.8x	3.4x	DUTCHBANGL	44,203	1.0%	0.2	7.6x	1.0x
Jute	14,258	14,214	+43.89	+0.31%	3	3,488	0.0%	13.5	0.3%	NM	-1210.8x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	691	694	-2.56	-0.37%	5	31,959	0.4%	39.3	0.9%	48.9x	1.9x	UNILEVERCL	39,960	0.9%	7.6	45.4x	13.3x
Miscellaneous	4,149	4,132	+17.14	+0.41%	14	225,888	3.0%	380.2	9.1%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,380	0.5%	1.5	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.5	12.1x	0.9x
Treasury Bond**	93	94	-0.53	-0.56%	252	2,973,128	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
APEXTANRY	124.0	+9.9%	33.4	NM	2.2x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	BSC	122.9	+2.5%	236.3	7.8x	1.5x
KPPL	12.4	+9.7%	29.8	NM	NM	BATBC	74,086	4.3%	15.3x	6.9x	NAVANAPHAR	114.2	-3.8%	192.5	25.9x	2.8x
KBPWBIL	15.0	+7.1%	46.8	NM	1.3x	BEXIMCO	69,196	4.0%	12.0x	1.2x	MEGHNALIFE	99.5	+4.0%	173.7	NM	NM
SIMTEX	21.0	+6.6%	41.2	23.1x	0.9x	RENATA	68,042	4.0%	38.0x	4.6x	SEAPEARL	214.7	-3.4%	136.5	31.1x	12.4x
APEXSPINN	137.2	+6.4%	13.3	39.5x	2.3x	BXPHARMA	45,564	2.6%	14.6x	1.5x	GENEXIL	84.1	+3.8%	132.9	24.7x	4.4x
OIMEX	26.5	+6.4%	53.1	NM	2.4x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	SONALILIFE	95.6	+0.3%	122.4	NM	NM
SAMATALETH	74.9	+5.9%	25.0	NM	5x	GP	38,700	2.2%	13.0x	7.2x	RUPALILIFE	189.3	+1.0%	117.0	NM	NM
AAMRANET	67.2	+4.3%	51.8	17.6x	1.8x	BRACBANK	30,976	1.8%	9.0x	0.9x	PAPERPROC	277.4	-4.5%	112.4	56.3x	8.2x
MEGHNALIFE	99.5	+4.0%	173.7	NM	NM	LHBL	26,980	1.6%	14.2x	3.9x	INTRACO	44.2	-0.7%	87.8	29.4x	3.4x
GENEXIL	84.1	+3.8%	132.9	24.7x	4.4x	EBL	24,998	1.5%	6.9x	0.9x	FAREASTLIF	78.1	-0.1%	84.0	NM	NM
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)
BANGAS	148.7	-6.6%	50.2	NM	7.1x	NBL	19,116	1.1%	NM	0.7x	RDFOOD	50.5	45.1	9.0	1,098	52.29
MONNOAGML	1,067.7	-5.7%	46.6	NM	6x	PUBALIBANK	18,314	1.1%	4.6x	0.6x	GP	282.0	261.6	20.0	195	51.26
CAPMIBLMF	12.6	-5.3%	6.9	NM	1.4x	CITYBANK	18,211	1.1%	5.5x	0.8x	DELTALIFE	145.0	145.0	1.0	344	49.88
STYLECRAFT	99.7	-5.1%	12.3	NM	6.3x	SEAPEARL	16,847	1.0%	31.1x	12.4x	RENATA	1,236.0	1,142.0	3.0	30	36.88
ICICL	31.7	-5.1%	18.4	27.6x	1.8x	ROBI	15,714	0.9%	85.7x	2.3x	LHBL	70.5	66.3	2.0	398	26.51
PAPERPROC	277.4	-4.5%	112.4	56.3x	8.2x	ALARABANK	15,220	0.9%	14.7x	1.1x	AOL	35.9	32.9	7.0	667	22.26
GQBALLPEN	129.4	-4.1%	51.0	NM	1.1x	PRIMEBANK	14,248	0.8%	5.5x	0.7x	BEACONPHAR	266.1	266.1	1.0	74	19.72
NAVANAPHAR	114.2	-3.8%	192.5	25.9x	2.8x	BSRMLTD	14,210	0.8%	NM	0.7x	SALVOCHEM	61.8	61.8	4.0	240	14.82
YPL	26.0	-3.7%	68.6	NM	4.9x	UPGDCL	13,547	0.8%	16.7x	4.4x	IFIC	11.1	11.0	2.0	1,097	12.11
SEAPEARL	214.7	-3.4%	136.5	31.1x	12.4x						SEAPEARL	208.9	204.1	6.0	49	10.12
<div><div>* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.</div><div>** The base of the Bond index starts at 100, starting from Jan 13, 2022</div><div>Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022</div></div>																

\* 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
RDFOOD	50.5	45.1	52.3	1,098	9
GP	282.0	261.6	51.3	195	20
DELTALIFE	145.0	145.0	49.9	344	1
RENATA	1,236.0	1,142.0	36.9	30	3
LHBL	70.5	66.3	26.5	398	2
AOL	35.9	32.9	22.3	667	7
BEACONPHAR	266.1	266.1	19.7	74	1
SALVOCHEM	61.8	61.8	14.8	240	4
IFIC	11.1	11.0	12.1	1,097	2
SEAPPEARL	208.9	204.1	10.1	49	6
SQURPHARMA	206.0	204.5	9.3	45	16
MARICO	2,361.0	2,360.0	8.9	4	5
AIL	80.0	70.8	8.6	113	2
BATBC	528.0	479.8	8.4	17	10
SONALILIFE	104.7	96.5	7.8	76	3
RUPALILIFE	176.0	176.0	7.4	42	2
SEMLLECMF	9.1	9.1	7.2	790	1
EHL	96.0	96.0	6.5	68	1
ABBANK	9.0	9.0	5.4	600	1
PTL	77.0	71.3	5.3	73	8
ORIONPHARM	81.0	79.6	4.4	56	2
ASIANS	50.6	50.6	4.0	80	1
<b>Total</b>			<b>453.1</b>		<b>193</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
ICICL		0.0%	10%	Record Date	23-Jul-23
EIL		0.0%	7%	Record Date	24-Jul-23

#### Important DSE News

##### ICICL

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2022. Date of AGM: 23.08.2023, Time: 11:30 AM, Venue: Digital Platform. Record Date: 23.07.2023. The Company has also reported EPS of Tk. 1.03, NAV per share of Tk. 17.01 and NOCFPS of Tk. 1.55 for the year ended December 31, 2022 as against Tk. 1.82, Tk. 20.96 and Tk. 3.33 respectively for the year ended December 31, 2021.

**(Q1 Un-audited):** EPS was Tk. 0.26 for January-March 2023 as against Tk. 0.34 for January-March 2022. NOCFPS was Tk. 0.18 for January-March 2023 as against Tk. 0.89 for January-March 2022. NAV per share was Tk. 17.26 as on March 31, 2023 and Tk. 21.30 as on March 31, 2022.

##### PRIMEINSUR

The Board of Directors has recommended 10% cash dividend for the year ended December 31, 2022. Date of AGM: 20.09.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 30.07.2023. The Company has also reported EPS of Tk. 2.38, NAV per share of Tk. 19.51 and NOCFPS of Tk. 5.77 for the year ended December 31, 2022 as against Tk. 2.01, Tk. 18.63 and Tk. 4.12 respectively for the year ended December 31, 2021.

**(Q1 Un-audited):** EPS was Tk. 0.69 for January-March 2023 as against Tk. 0.74 for January-March 2022. NOCFPS was Tk. 0.26 for January-March 2023 as against Tk. 3.61 for January-March 2022. NAV per share was Tk. 20.20 as on March 31, 2023 and Tk. 19.51 as on December 31, 2022.

##### ABBLPBOND

Trading of 'AB Bank Perpetual Bond' of AB Bank Ltd. will commence at DSE from today i.e., June 15, 2023 under 'N' category. DSE Trading Code for AB Bank Perpetual Bond is "ABBLPBOND" and DSE Scrip Code is 26013 under 'Corporate Bond' sector. Some salient features of the bond are as follows: 1. Name of the Bond: AB Bank Perpetual Bond, 2. Issuer: AB Bank Limited, 3. Issue price: BDT 1,000 per bond, 4. Face value: BDT 1,000 per bond, 5. Market lot: 01 (One), 6. Tenure: N/A, 7. Range of rate of return: 6%-10%, 8. Coupon payment frequency: Semi-Annual.

##### UNIONBANK

The Company has informed that Mr. Ahsanul Alam, nominee of Unique Investment & Securities Limited has resigned from the post of Chairman and Director of Union Bank Limited with effective from June 12, 2023 and as nominee of Unique Investment & Securities Limited Professor Dr. Md. Salim Uddin FCA, FCMA, has been elected as Chairman and Director of Union Bank Limited (subject to approval from Bangladesh Bank).

##### GP

The company has informed that it has received the certified copy of the judgement passed by the Hon'ble Appellate Division of the Supreme Court of Bangladesh on the case relating to VAT mechanism and spectrum assignment fee during 2G license renewal on June 01, 2023. In accordance with the said judgment, the company has handed over the pay orders to BTRC on June 14, 2023 without prejudice and upon reserving its rights as permitted by law.

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