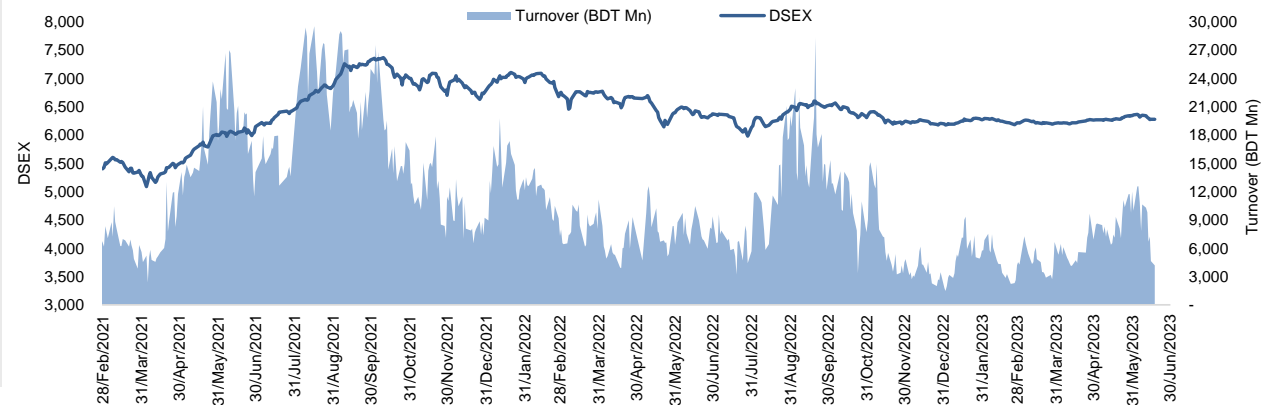


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.02%) gained 1.05 points and closed at 6,281.07. The blue-chip index DS30 (+0.03%), the Shariah-based index DSES (-0.12%), and the large-cap index CDSET (+0.02%) closed at 2,183.26, 1,363.52, and 1,209.00 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.11% followed by NBF1 (+0.10%), Bank (+0.09%), Fuel & Power (+0.01%). Engineering experienced the highest loss of 0.04% followed by Pharmaceutical (-0.02%), Telecommunication (0.00%). Block trades contributed 13.9% of the overall market turnover. Bangladesh Shipping Corporation (+2.6%) was the most traded share with a turnover of BDT 232 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,281.07	6,280.02	+1.05	+0.02%	+1.2%
DS30	2,183.26	2,182.50	+0.75	+0.03%	-0.5%
DSES	1,363.52	1,365.17	-1.66	-0.12%	+0.3%
CDSET	1,209.00	1,208.75	+0.25	+0.02%	-0.4%

	Advanced	Declined	Unchanged	Total
All Category	73	96	185	354
A Category (Equity)	50	55	136	241
B Category (Equity)	17	33	41	91
N Category (Equity)	3	1	1	5
Z Category (Equity)	3	7	7	17
Mutual Funds	2	1	27	30
Corporate Bonds	0	0	4	4
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,695,700	7,695,292	+0.0%
	Mn USD	70,931	70,928	
Turnover	Mn BDT	4,182	4,651	-10.1%
	Mn USD	39	43	
Volume	Mn Shares	85	79	+7.6%
No. of Trade		111,881	127,375	-12.2%

* Average Interbank Exchange Rate is BDT 108.50 as of Jun 15, 2023

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Figure: Sectorial Turnover (BDT Mn)

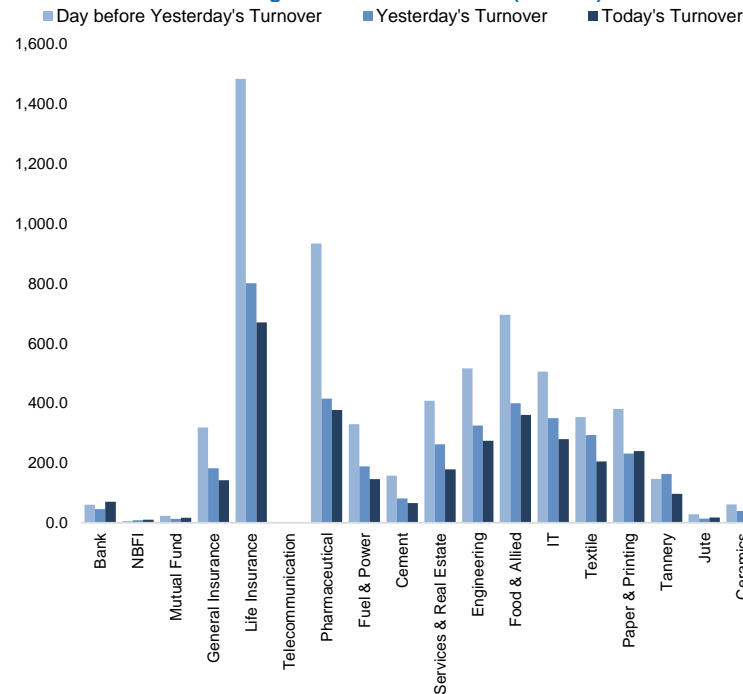
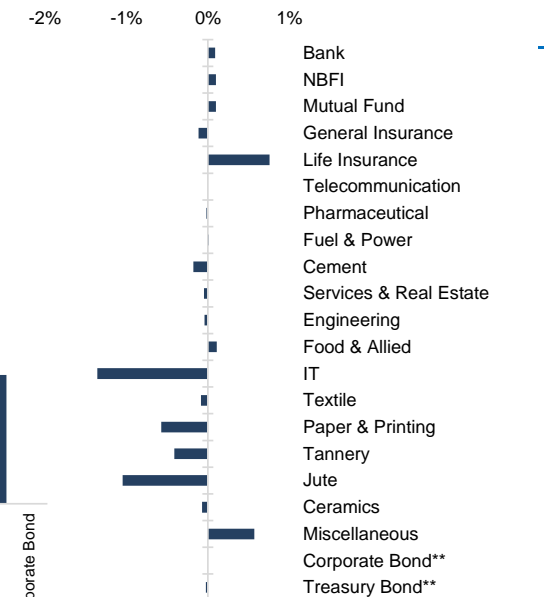


Figure: Sectorial Mcap Change



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	1,440	1,439	+1.30	+0.09%	35	678,857	9.0%	70.5	2.0%	11.8x	0.7x	GP	386,996	8.5%	1.3	13.0x	7.2x
NBFI	1,920	1,918	+1.92	+0.10%	23	186,857	2.5%	9.9	0.3%	NM	4.4x	WALTONHIL	317,378	7.0%	0.3	49.1x	3.2x
Mutual Fund	830	830	+0.83	+0.10%	37	37,554	0.5%	16.5	0.5%	NM	0.7x	BATBC	280,098	6.2%	1.0	15.3x	6.9x
General Insurance	3,240	3,243	-3.72	-0.11%	42	94,556	1.3%	142.4	4.0%	17.3x	1.5x	SQURPHARMA	185,977	4.1%	5.0	9.9x	1.7x
Life Insurance	2,951	2,929	+22.20	+0.76%	15	82,496	1.1%	670.1	18.6%	NM	NM	ROBI	157,138	3.5%	0.0	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.5	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,700	3,701	-0.59	-0.02%	34	717,804	9.6%	377.3	10.5%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,701	1,701	+0.14	+0.01%	23	448,697	6.0%	146.0	4.1%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,466	2,471	-4.36	-0.18%	7	118,457	1.6%	65.5	1.8%	30.1x	2.6x	BERGERPBL	83,086	1.8%	11.7	27.6x	6.4x
Services & Real Esta	1,960	1,961	-0.96	-0.05%	8	77,419	1.0%	178.5	5.0%	28.0x	1.0x	LHBL	76,999	1.7%	48.6	14.2x	3.9x
Engineering	4,504	4,506	-1.77	-0.04%	42	528,651	7.0%	274.1	7.6%	72.3x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,504	21,481	+23.59	+0.11%	21	397,911	5.3%	360.4	10.0%	20.0x	8.1x	BXPHARMA	65,222	1.4%	0.0	14.6x	1.5x
IT	3,172	3,216	-43.63	-1.36%	11	41,358	0.6%	279.3	7.8%	28.9x	3.0x	BRACBANK	57,596	1.3%	0.3	9.0x	0.9x
Textile	1,617	1,619	-1.37	-0.08%	58	169,333	2.3%	205.1	5.7%	83.4x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,787	10,849	-62.14	-0.57%	6	41,560	0.6%	239.2	6.6%	40.1x	2.1x	ISLAMIBANK	52,486	1.2%	0.1	8.9x	0.8x
Tannery	3,260	3,274	-13.51	-0.41%	6	34,433	0.5%	97.0	2.7%	49.6x	3.4x	DUTCHBANGL	44,203	1.0%	0.0	7.6x	1.0x
Jute	14,109	14,258	-148.87	-1.04%	3	3,451	0.0%	17.4	0.5%	NM	-1198.2x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	691	691	-0.48	-0.07%	5	31,937	0.4%	18.2	0.5%	48.9x	1.9x	UNILEVERCL	39,894	0.9%	18.6	45.3x	13.2x
Miscellaneous	4,172	4,149	+23.57	+0.57%	14	227,172	3.0%	430.7	12.0%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.3	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,380	0.5%	0.3	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.2	12.1x	0.9x
Treasury Bond**	93	93	-0.02	-0.02%	252	2,972,452	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
CENTRALPHL	12.3	+9.8%	56.6	NM	2.1x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	BSC	126.1	+2.6%	231.8	8.0x	1.6x
MIDLANDBNK	12.7	+7.6%	29.4	13.1x	1.0x	BATBC	74,086	4.3%	15.3x	6.9x	MEGHNALIFE	105.4	+5.9%	227.5	NM	NM
MIDASFIN	10.9	+6.9%	1.9	8.2x	1.2x	BEXIMCO	69,196	4.0%	12.0x	1.2x	NAVANAPHAR	113.8	-0.4%	163.0	25.8x	2.8x
EMERALDOIL	133.1	+6.8%	60.4	NM	NM	RENATA	68,042	4.0%	38.0x	4.6x	KBPPWBIL	16.0	+6.7%	99.2	NM	1.3x
KBPPWBIL	16.0	+6.7%	99.2	NM	1.3x	BXPHARMA	45,564	2.6%	14.6x	1.5x	SEAPEARL	212.2	-1.2%	96.8	30.8x	12.3x
UNIONCAP	8.5	+6.3%	5.5	NM	NM	BEACONPHAR	39,617	2.3%	80.9x	9.2x	PAPERPROC	267.4	-3.6%	89.5	54.2x	7.9x
MEGHNALIFE	105.4	+5.9%	227.5	NM	NM	GP	38,700	2.2%	13.0x	7.2x	INTRACO	44.4	+0.5%	84.7	29.5x	3.5x
SHURWID	18.2	+5.2%	16.7	NM	1.4x	BRACBANK	30,976	1.8%	9.0x	0.9x	SONALILIFE	95.9	+0.3%	82.8	NM	NM
AGRANINS	39.8	+4.7%	4.3	20.7x	2.0x	LHBL	26,980	1.6%	14.2x	3.9x	GENEXIL	82.5	-1.9%	77.3	24.3x	4.3x
RUPALILIFE	198.2	+4.7%	74.4	NM	NM	EBL	24,998	1.5%	6.9x	0.9x	RUPALILIFE	198.2	+4.7%	74.4	NM	NM
						OLYMPIC	19,683	1.1%	18.6x	3.1x						
						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%	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.

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BSC	128.5	128.5	199.2	1,550	1
RUPALILIFE	190.0	180.0	95.9	525	12
UCB	11.2	11.2	55.4	4,951	1
IPDC	53.7	53.7	49.9	930	1
SEAPPEARL	223.0	197.0	14.6	70	4
SQURPHARMA	207.2	205.0	12.1	59	20
BEXIMCO	113.9	113.9	11.2	99	1
AOL	34.1	32.9	10.3	310	6
PRIMEINSUR	80.9	80.9	8.8	109	1
OIMEX	27.9	27.9	8.4	300	1
TRUSTBANK	31.5	31.5	7.9	250	1
MARICO	2,369.0	2,360.0	6.8	3	7
BXPBARMA	145.5	143.0	5.9	40	2
KPPL	13.2	12.2	5.1	395	2
BRACBANK	39.0	32.3	5.0	152	6
LRBDL	33.4	31.6	4.5	142	7
CNATEX	9.8	9.4	3.9	397	2
EMERALDOIL	121.0	120.0	3.3	28	5
ACMEPL	32.0	32.0	3.2	100	1
ANWARGALV	195.1	194.7	2.9	15	2
FINEFOODS	111.5	111.5	2.9	26	1
ACI	240.0	237.5	2.9	12	5
Total			582.2		169

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

SHAHJABANK

Mr. Fakir Akhtaruzzaman, one of the Directors of the Company, has expressed his intention to buy 632 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange Ltd. within next 30 working days.

UNIONBANK

The Company will be placed in 'B' category from existing 'A' category with effect from June 19, 2023 as the Company has approved 5% cash dividend for the year ended December 31, 2022.

GBBPOWER

The company has informed that it was instructed by BPDB to shut-down the plant, as per the expiry of the Power Purchase Agreement (PPA) of GBBPL 20?10% MW Natural Gas Fired power plant on June 16, 2023. The Company has applied for extension of the Contract for Supply of Electricity to the Power Division of the Ministry of Power, Energy and Mineral Resources (MPEMR) on January 11, 2023 which is under active consideration. The company has also informed that as the PPA term was over, the plant will be shut-down until further instruction from Bangladesh Power Development Board (BPDB) or Ministry of Power Energy and Mineral Resources for operation of the Power Plant.

DHAKAINS

(Q1 Un-audited): EPS was Tk. 0.77 for January-March 2023 as against Tk. 0.75 for January-March 2022. NOCFPS was Tk. 0.82 for January-March 2023 as against Tk. 0.54 for January-March 2022. NAV per share (with revaluation) was Tk. 34.77 as on March 31, 2023 and Tk. 33.99 as on December 31, 2022, NAV per share (without revaluation) was Tk. 24.14 as on March 31, 2023 and Tk. 23.36 as on December 31, 2022.

BERGERPBL

The company has informed that Bangladesh Investment Development Authority (BIDA) has approved the Shareholder's Loan agreement between the company and its parent company, J&N Investments (Asia) Limited. The purpose of the loan is to meet up the working capital requirement. As per the agreement, the company will receive a shareholder's loan amounting to USD 60.00 million only in phases as per the Company's business requirement.

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