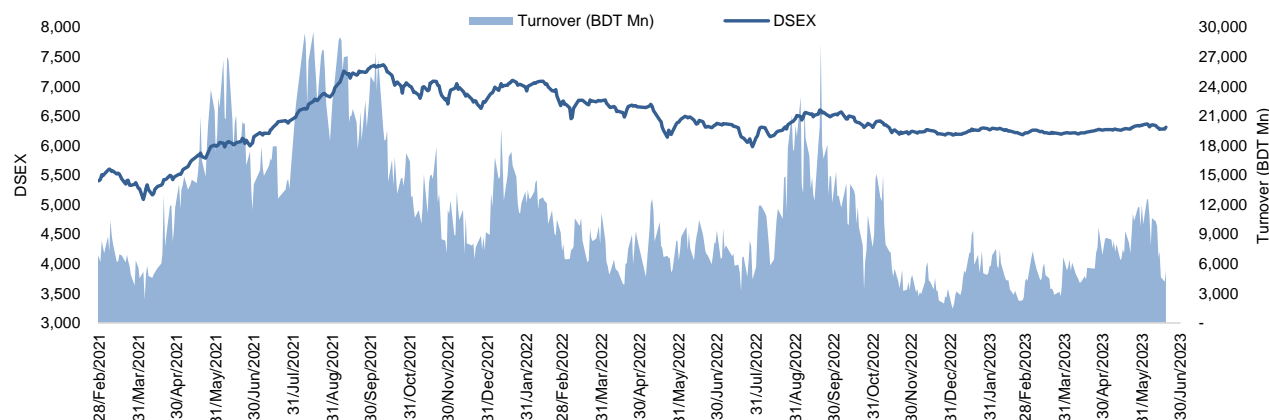


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.53%) gained 33.08 points and closed at 6,314.14. The blue-chip index DS30 (+0.25%), the Shariah-based index DSES (+0.47%), and the large-cap index CDSET (+0.12%) closed at 2,188.61, 1,369.96, and 1,210.43 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.33% followed by Pharmaceutical (+0.12%), Fuel & Power (+0.09%), Engineering (+0.08%), NBF1 (+0.03%), Telecommunication (0.00%), and Bank (-0.02%), respectively. Block trades contributed 12.6% of the overall market turnover. Meghna Life Insurance Co. Ltd. (+5.9%) was the most traded share with a turnover of BDT 282 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,314.14	6,281.07	+33.08	+0.53%	+1.7%
DS30	2,188.61	2,183.26	+5.35	+0.25%	-0.3%
DSES	1,369.96	1,363.52	+6.44	+0.47%	+0.8%
CDSET	1,210.43	1,209.00	+1.43	+0.12%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	145	29	178	352
A Category (Equity)	94	18	123	235
B Category (Equity)	40	8	47	95
N Category (Equity)	3	1	1	5
Z Category (Equity)	8	2	7	17
Mutual Funds	4	0	22	26
Corporate Bonds	1	0	2	3
Treasury Bonds	0	2	0	2

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,711,799	7,695,700	+0.2%
	Mn USD	71,070	70,922	
Turnover	Mn BDT	5,332	4,182	+27.5%
	Mn USD	49	39	
Volume	Mn Shares	99	85	+16.6%
No. of Trade		133,849	111,881	+19.6%

\* Average Interbank Exchange Rate is BDT 108.51 as of Jun 18, 2023

Figure: Sectorial Turnover (BDT Mn)

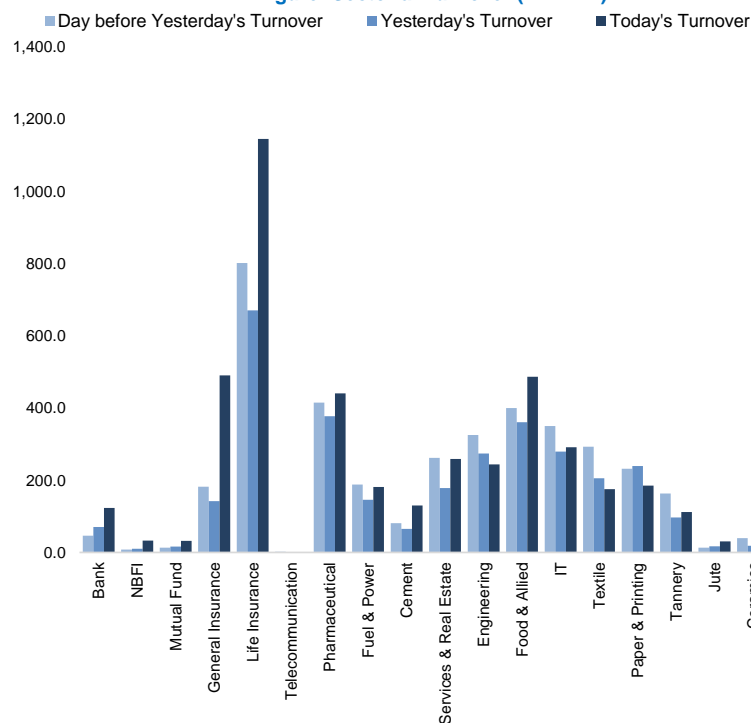
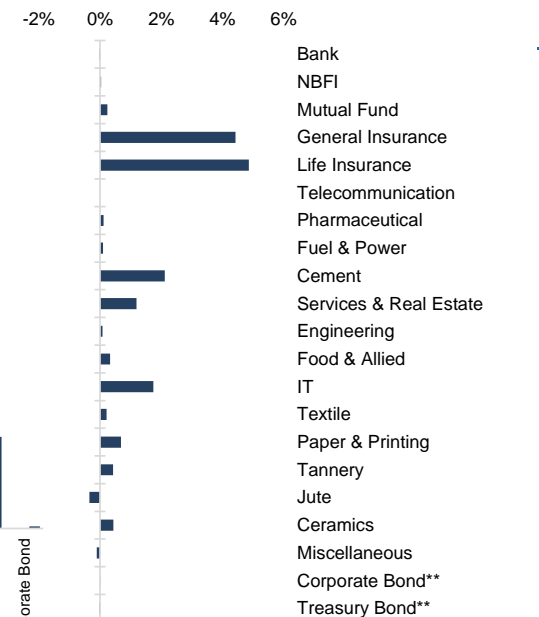


Figure: Sectorial Mcap Change



Market PE 18.4x

Market PB 1.5x

\* Market P/E calculation excludes NBL

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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	1,440	-0.31	-0.02%	35	678,711	9.0%	123.5	2.6%	11.8x	0.7x	GP	386,996	8.5%	0.7	13.0x	7.2x
NBFI	1,921	1,920	+0.66	+0.03%	23	186,921	2.5%	32.6	0.7%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	830	+1.99	+0.24%	37	37,644	0.5%	31.7	0.7%	NM	0.7x	BATBC	280,098	6.2%	0.4	15.3x	6.9x
General Insurance	3,383	3,240	+143.68	+4.44%	42	98,750	1.3%	490.6	10.5%	18.0x	1.5x	SQURPHARMA	185,977	4.1%	3.5	9.9x	1.7x
Life Insurance	3,095	2,951	+143.75	+4.87%	15	86,514	1.1%	1,145.6	24.6%	NM	NM	ROBI	157,138	3.5%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.8	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.0	38.0x	4.6x
Pharmaceutical	3,705	3,700	+4.38	+0.12%	34	718,653	9.6%	440.6	9.5%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,703	1,701	+1.61	+0.09%	23	449,122	6.0%	181.0	3.9%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,519	2,466	+52.20	+2.12%	7	120,964	1.6%	130.0	2.8%	30.8x	2.6x	BERGERPBL	82,752	1.8%	2.3	27.5x	6.4x
Services & Real Estate	1,983	1,960	+23.40	+1.19%	8	78,344	1.0%	259.0	5.6%	28.4x	1.0x	LHBL	78,509	1.7%	84.9	14.5x	4.0x
Engineering	4,508	4,504	+3.79	+0.08%	42	529,096	7.0%	243.7	5.2%	72.4x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,575	21,504	+70.60	+0.33%	21	399,217	5.3%	486.5	10.4%	20.0x	8.1x	BXPHARMA	65,222	1.4%	0.2	14.6x	1.5x
IT	3,228	3,172	+55.33	+1.74%	11	42,079	0.6%	291.4	6.3%	29.4x	3.0x	BRACBANK	57,596	1.3%	0.3	9.0x	0.9x
Textile	1,621	1,617	+3.44	+0.21%	58	169,693	2.3%	175.6	3.8%	83.6x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,861	10,787	+74.41	+0.69%	6	41,846	0.6%	185.3	4.0%	40.4x	2.1x	ISLAMIBANK	52,486	1.2%	1.3	8.9x	0.8x
Tannery	3,274	3,260	+14.06	+0.43%	6	34,581	0.5%	111.9	2.4%	49.8x	3.4x	DUTCHBANGL	44,203	1.0%	0.2	7.6x	1.0x
Jute	14,060	14,109	-49.27	-0.35%	3	3,439	0.0%	30.3	0.6%	NM	-1194.0x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	694	691	+3.01	+0.44%	5	32,076	0.4%	30.2	0.6%	49.1x	1.9x	UNILEVERCL	39,628	0.9%	17.9	45.0x	13.2x
Miscellaneous	4,168	4,172	-4.40	-0.11%	14	226,933	3.0%	253.6	5.4%	16.1x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.00	+0.00%	9	36,380	0.5%	5.5	0.1%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	-0.02	-0.02%	252	2,971,810	39.5%	10.7	0.2%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MEGHNAINS	46.3	+10.0%	28.4	30.1x	3.0x
CRYSTALINS	45.2	+10.0%	15.2	15.0x	1.8x
PROGRESLIF	93.0	+9.9%	18.9	NM	NM
TILIL	77.7	+9.9%	114.2	NM	NM
PRIMELIFE	72.4	+9.9%	27.0	NM	NM
PARAMOUNT	46.8	+9.9%	20.2	26.7x	1.8x
ICICL	34.6	+9.8%	25.4	30.1x	2x
SONALILIFE	104.8	+9.3%	141.8	NM	NM
PURABIGEN	29.1	+9.0%	10.9	19.7x	2.1x
RUPALILIFE	215.9	+8.9%	140.3	NM	NM

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KPPL	12.1	-4.7%	45.2	NM	NM
APEXTANRY	115.4	-3.7%	13.7	NM	2x
MIDLANDBNK	12.3	-3.1%	30.8	12.7x	0.9x
KBPWBIL	15.5	-3.1%	41.9	NM	1.3x
MERCINS	29.9	-2.6%	1.5	17.0x	1.4x
METROSPIN	35.0	-2.2%	26.9	35.8x	1.7x
APEXSPINN	136.7	-1.4%	6.6	39.4x	2.3x
UNIONCAP	8.4	-1.2%	4.1	NM	NM
CITYGENINS	45.6	-1.1%	138.3	19.0x	2.4x
SIMTEX	20.3	-1.0%	7.7	22.3x	0.9x

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%	14.5x	4.0x
EBL	24,998	1.5%	6.9x	0.9x
OLYMPIC	19,683	1.1%	19.0x	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%	14.9x	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	111.6	+5.9%	282.4	NM	NM
NAVANAPHAR	115.5	+1.5%	154.8	26.2x	2.8x
SONALILIFE	104.8	+9.3%	141.8	NM	NM
RUPALILIFE	215.9	+8.9%	140.3	NM	NM
CITYGENINS	45.6	-1.1%	138.3	19.0x	2.4x
BSC	125.8	-0.2%	137.6	8.0x	1.6x
ADVENT	28.9	+2.5%	127.7	27.3x	1.9x
GEMINISEA	813.1	+2.1%	121.9	38.8x	32.0x
FAREASTLIF	81.4	+3.6%	121.3	NM	NM
INTRACO	46.1	+3.8%	120.5	30.6x	3.6x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RUPALILIFE	210.0	178.5	7.0	313	63.06
SQURPHARMA	226.0	205.0	28.0	298	61.85
GP	273.0	261.6	25.0	218	57.97
IPDC	55.0	54.9	2.0	1,030	56.63
BRACBANK	35.8	32.3	7.0	1,348	46.25
BSC	132.0	122.1	4.0	269	35.32
MPETROLEUM	201.0	201.0	1.0	150	30.15
DUTCHBANGL	59.0	57.1	2.0	510	30.07
SALVOCHEM	61.8	61.8	5.0	402	24.87
BANKASIA	20.8	20.8	1.0	1,000	20.80

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RUPALILIFE	210.0	178.5	63.1	313	7
SQURPHARMA	226.0	205.0	61.9	298	28
GP	273.0	261.6	58.0	218	25
IPDC	55.0	54.9	56.6	1,030	2
BRACBANK	35.8	32.3	46.2	1,348	7
BSC	132.0	122.1	35.3	269	4
MPETROLEUM	201.0	201.0	30.2	150	1
DUTCHBANGL	59.0	57.1	30.1	510	2
SALVOCHEM	61.8	61.8	24.9	402	5
BANKASIA	20.8	20.8	20.8	1,000	1
JAMUNAOIL	186.5	186.5	18.7	100	1
PRAGATILIF	132.0	129.0	14.9	114	7
BXPHARMA	145.3	132.2	12.4	89	9
EMERALDOIL	134.0	119.9	10.7	88	5
GIB	7.8	7.8	10.3	1,315	2
RENATA	1,217.9	1,217.9	10.2	8	2
BSCCL	218.9	218.9	10.1	46	2
BATASHOE	1,025.0	1,025.0	8.2	8	1
LRBDL	38.5	31.6	7.4	228	5
AAMRANET	73.1	71.0	6.6	93	2
EHL	96.0	96.0	6.5	68	1
AL-HAJTEX	170.0	151.0	5.9	37	4
<b>Total</b>			<b>672.1</b>		<b>213</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
PRIMEINSUR		0.0%	10%	Record Date	30-Jul-23

**Important DSE News**
**BGIC**

**(Q1 Un-audited):** EPS was Tk. 0.73 for January-March 2023 as against Tk. 0.71 for January-March 2022. NOCFPS was Tk. 1.68 for January-March 2023 as against Tk. 0.87 for January-March 2022. NAV per share was Tk. 20.10 as on March 31, 2023 and Tk. 20.25 as on March 31, 2022.

**PADMAOIL**

The company has informed that the Board of Directors has taken decision to sell 11.627 acres' land (including infrastructure and trees) at the Company's Main Installation, Guptakhal, Chattogram to Bangladesh Petroleum Corporation (BPC) by sale deed for the government's project of "Installation of ERL Unite-2" subject to approval of Hon'ble Shareholders in the next AGM/EGM.

**GP**

The company has informed that it has signed agreements with Large Taxpayer Unit (LTU-Tax) to settle Corporate Income Tax disputes for the assessment years from 2007-2008 to 2019-2020 through Alternative Dispute Resolution (ADR) process.

**NCCBANK**

Mrs. Sohela Hossain, one of the Sponsor Directors of the company, has expressed her intention to buy 8,00,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange Limited (DSE) within next 30 working days.

**SHAHJABANK**

Alhaj Tofazzal Hossain, one of the Sponsors of the company, has expressed his intention to sell 25,00,000 shares out of his holding of 1,56,78,954 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange Limited (DSE) within next 30 working days.

**BEACONPHAR**

The Company has informed that the Board of Directors has appointed Mr. Md. Jalal Uddin, FCA as Chief Financial Officer of the company with effect from June 06, 2023.

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