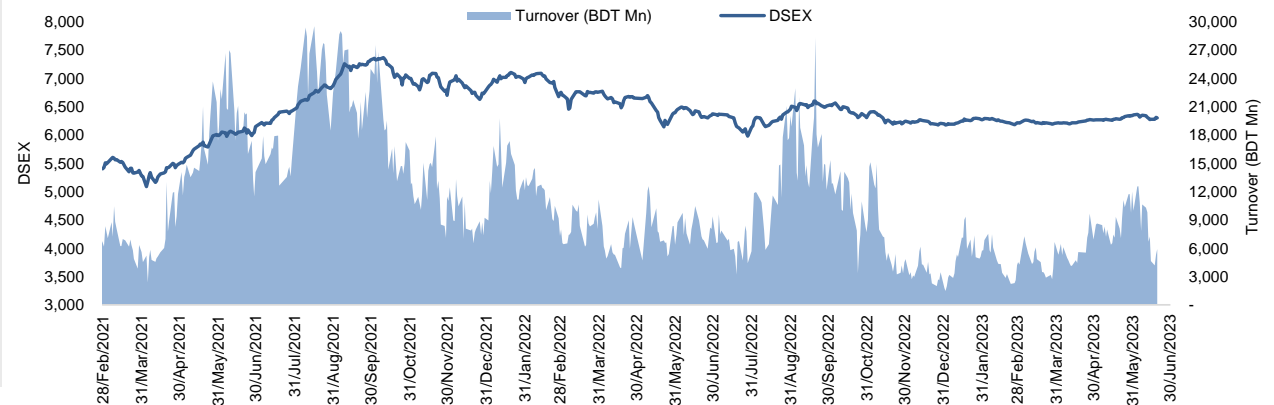


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.20%) lost 12.34 points and closed at 6,301.80. The blue-chip index DS30 (-0.17%), the Shariah-based index DSES (-0.19%), and the large-cap index CDSET (-0.07%) closed at 2,184.82, 1,367.41, and 1,209.61 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.10% followed by Pharmaceutical (-0.06%), NBFi (-0.03%), Fuel & Power (-0.02%), Bank (-0.02%), Engineering (0.00%), and Telecommunication (0.00%), respectively. Block trades contributed 14.3% of the overall market turnover. Meghna Life Insurance Co. Ltd. (-7.3%) was the most traded share with a turnover of BDT 272 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,301.80	6,314.14	-12.34	-0.20%	+1.5%
DS30	2,184.82	2,188.61	-3.79	-0.17%	-0.5%
DSES	1,367.41	1,369.96	-2.54	-0.19%	+0.6%
CDSET	1,209.61	1,210.43	-0.82	-0.07%	-0.4%

	Advanced	Declined	Unchanged	Total
All Category	56	118	178	352
A Category (Equity)	22	86	124	232
B Category (Equity)	25	26	46	97
N Category (Equity)	1	3	1	5
Z Category (Equity)	8	3	7	18
Mutual Funds	0	3	23	26
Corporate Bonds	0	0	1	1
Treasury Bonds	4	0	0	4

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,704,916	7,711,799	-0.1%
	Mn USD	71,026	71,090	
Turnover	Mn BDT	5,910	5,332	+10.8%
	Mn USD	54	49	
Volume	Mn Shares	108	99	+9.7%
No. of Trade		147,353	133,849	+10.1%

* Average Interbank Exchange Rate is BDT 108.48 as of Jun 19, 2023

Fahim Hassan
 Research Analyst
 (880) 1709636546
 fahim.hassan@bracepl.com

HZ Towhidi Khan
 Senior Research Associate
 (880) 1708805224
 hztowhidi.khan@bracepl.com

Figure: Sectorial Turnover (BDT Mn)

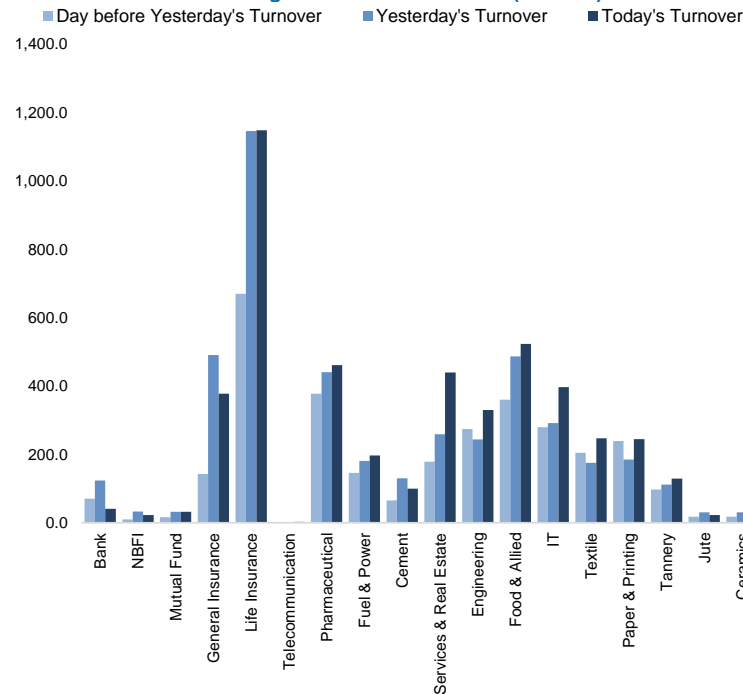
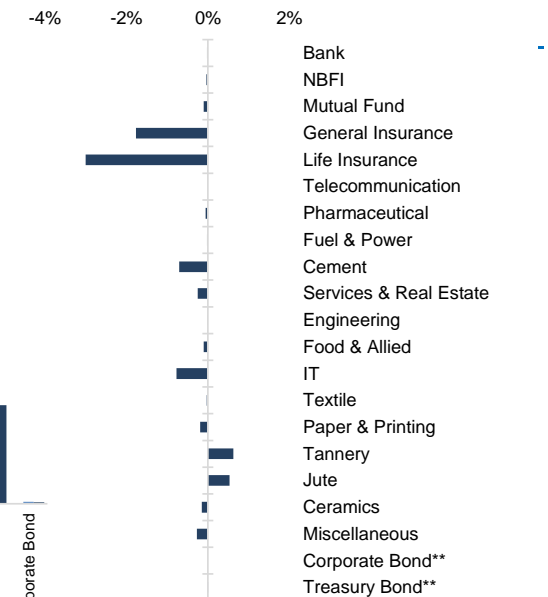


Figure: Sectorial Mcap Change



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	1,440	-0.27	-0.02%	35	678,583	9.0%	40.8	0.8%	11.8x	0.7x	GP	386,996	8.5%	1.6	13.0x	7.2x
NBFI	1,920	1,921	-0.66	-0.03%	23	186,857	2.5%	22.9	0.5%	NM	4.4x	WALTONHIL	317,378	7.0%	0.1	49.1x	3.2x
Mutual Fund	832	832	-0.84	-0.10%	37	37,606	0.5%	31.8	0.6%	NM	0.7x	BATBC	280,098	6.2%	0.8	15.3x	6.9x
General Insurance	3,324	3,383	-59.58	-1.76%	42	97,011	1.3%	377.8	7.5%	17.7x	1.5x	SQURPHARMA	185,977	4.1%	3.8	9.9x	1.7x
Life Insurance	3,002	3,095	-92.73	-3.00%	15	83,922	1.1%	1,148.0	22.7%	NM	NM	ROBI	157,138	3.5%	0.5	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	2.3	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.2	38.0x	4.6x
Pharmaceutical	3,703	3,705	-2.16	-0.06%	34	718,235	9.6%	460.9	9.1%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,702	1,703	-0.38	-0.02%	23	449,022	6.0%	196.8	3.9%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,501	2,519	-17.65	-0.70%	7	120,116	1.6%	99.5	2.0%	30.5x	2.6x	BERGERPBL	82,126	1.8%	3.4	27.3x	6.3x
Services & Real Esta	1,978	1,983	-4.97	-0.25%	8	78,147	1.0%	439.9	8.7%	28.3x	1.0x	LHBL	77,812	1.7%	54.1	14.4x	3.9x
Engineering	4,508	4,508	-0.16	-0.00%	42	529,076	7.0%	329.9	6.5%	72.4x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,554	21,575	-21.32	-0.10%	21	398,823	5.3%	523.3	10.3%	20.0x	8.1x	BXPHARMA	65,222	1.4%	0.5	14.6x	1.5x
IT	3,203	3,228	-24.87	-0.77%	11	41,755	0.6%	396.9	7.8%	29.2x	3.0x	BRACBANK	57,596	1.3%	0.1	9.0x	0.9x
Textile	1,620	1,621	-0.43	-0.03%	58	169,648	2.3%	247.1	4.9%	83.6x	1.1x	BEACONPHAR	56,595	1.2%	1.1	80.9x	9.2x
Paper & Printing	10,840	10,861	-20.69	-0.19%	6	41,767	0.6%	245.0	4.8%	40.3x	2.1x	ISLAMIBANK	52,486	1.2%	1.2	8.9x	0.8x
Tannery	3,295	3,274	+20.54	+0.63%	6	34,798	0.5%	129.0	2.5%	50.1x	3.4x	DUTCHBANGL	44,203	1.0%	0.0	7.6x	1.0x
Jute	14,135	14,060	+75.25	+0.54%	3	3,458	0.0%	22.8	0.5%	NM	-1200.4x	TITASGAS	40,459	0.9%	0.1	32.0x	0.6x
Ceramics	693	694	-1.02	-0.15%	5	32,029	0.4%	23.5	0.5%	49.0x	1.9x	UNILEVERCL	39,443	0.9%	18.4	44.8x	13.1x
Miscellaneous	4,157	4,168	-11.27	-0.27%	14	226,319	3.0%	288.7	5.7%	16.0x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,380	0.5%	4.1	0.1%	NM	NM	SUMITPOWER	36,308	0.8%	0.2	12.1x	0.9x
Treasury Bond**	93	93	+0.00	+0.00%	252	2,971,861	39.5%	30.6	0.6%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	17.0	+9.7%	107.1	NM	1.4x
KPPL	13.2	+9.1%	63.1	NM	NM
APEXTANRY	123.2	+6.8%	12.0	NM	2.1x
EHL	103.6	+5.8%	247.2	15.3x	1.3x
IMAMBUTTON	118.3	+5.0%	15.6	NM	24.6x
MEGHNAINS	48.4	+4.5%	86.7	31.4x	3.2x
BDWELDING	24.4	+3.8%	5.1	NM	2x
FARCHEM	11.0	+3.8%	57.6	NM	1.0x
NTC	444.7	+3.7%	7.3	NM	220.1x
DESHBANDHU	22.8	+3.6%	63.8	65.1x	1.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MEGHNALIFE	103.4	-7.3%	272.1	NM	NM
SONALILIFE	98.3	-6.2%	130.8	NM	NM
CLICL	78.0	-6.0%	51.6	NM	NM
FAREASTLIF	76.9	-5.5%	110.4	NM	NM
POPULARLIF	80.1	-5.1%	66.2	NM	NM
SUNLIFEINS	53.0	-4.8%	36.3	NM	NM
PRAGATILIF	131.2	-4.7%	40.3	NM	NM
PRIMELIFE	69.0	-4.7%	22.7	NM	NM
CONTININS	31.1	-4.3%	2.9	50.2x	1.4x
AGRANINS	41.1	-4.2%	6.5	21.4x	2.0x

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%	14.4x	3.9x
EBL	24,998	1.5%	6.9x	0.9x
OLYMPIC	19,683	1.1%	18.7x	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%	30.3x	12.1x
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	103.4	-7.3%	272.1	NM	NM
EHL	103.6	+5.8%	247.2	15.3x	1.3x
GEMINISEA	842.0	+3.6%	196.3	40.1x	33.2x
RUPALILIFE	212.7	-1.5%	182.1	NM	NM
TILIL	76.6	-1.4%	152.5	NM	NM
SONALILIFE	98.3	-6.2%	130.8	NM	NM
NAVANAPHAR	111.8	-3.2%	121.8	25.4x	2.7x
INTRACO	45.1	-2.2%	110.6	30.0x	3.5x
FAREASTLIF	76.9	-5.5%	110.4	NM	NM
KBPPWBIL	17.0	+9.7%	107.1	NM	1.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
DELTALIFE	150.5	137.0	3.0	2,184	299.87
SQURPHARMA	209.8	206.2	29.0	413	85.69
RENATA	1,231.0	1,141.8	6.0	64	77.87
BSC	128.0	128.0	1.0	469	60.03
DOREENPWR	61.0	57.0	3.0	452	26.93
GP	264.0	261.6	25.0	83	21.72
BRACBANK	32.3	32.3	5.0	660	21.32
JAMUNAOIL	186.5	186.5	1.0	100	18.65
SAIFPOWER	29.8	29.8	1.0	485	14.45
IPDC	52.1	52.1	1.0	270	14.07

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
DELTALIFE	150.5	137.0	299.9	2,184	3
SQURPHARMA	209.8	206.2	85.7	413	29
RENATA	1,231.0	1,141.8	77.9	64	6
BSC	128.0	128.0	60.0	469	1
DOREENPWR	61.0	57.0	26.9	452	3
GP	264.0	261.6	21.7	83	25
BRACBANK	32.3	32.3	21.3	660	5
JAMUNAOIL	186.5	186.5	18.7	100	1
SAIFPOWER	29.8	29.8	14.5	485	1
IPDC	52.1	52.1	14.1	270	1
DUTCHBANGL	59.0	57.6	12.3	209	2
EBL	29.4	29.4	11.7	397	1
RUPALILIFE	209.0	205.0	11.0	54	7
AL-HAJTEX	170.0	153.0	10.5	63	9
GEMINISEA	870.0	824.7	9.9	12	4
NAVANAPHAR	118.5	118.0	8.3	70	2
LHBL	74.3	74.3	8.0	108	1
MEGHNALIFE	119.0	112.0	5.8	50	5
MPETROLEUM	201.5	201.5	5.0	25	1
BPPL	29.3	29.3	4.7	160	1
IFIC	11.2	11.2	4.5	400	2
RDFOOD	52.5	49.7	4.1	83	3
Total			844.1		217

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

ISLAMIBANK

The Company has informed that the Board of Directors has elected Mr. Ahsanul Alam as the Chairman of the Board of Directors of the Company.

TAKAFULINS

The Company has informed that the Board of Directors has re-elected Mrs. Tahmina Afroz as Chairman and Mr. Emdadul Hoque Chowdhury (Emdad) as Vice Chairman of the Company.

SBACBANK

The Company has informed that Mr. Habibur Rahman was appointed as Managing Director and CEO in the 153rd Board meeting of the company dated 16th November 2022 and the appointment was approved by Bangladesh Bank on 12th December, 2022.

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