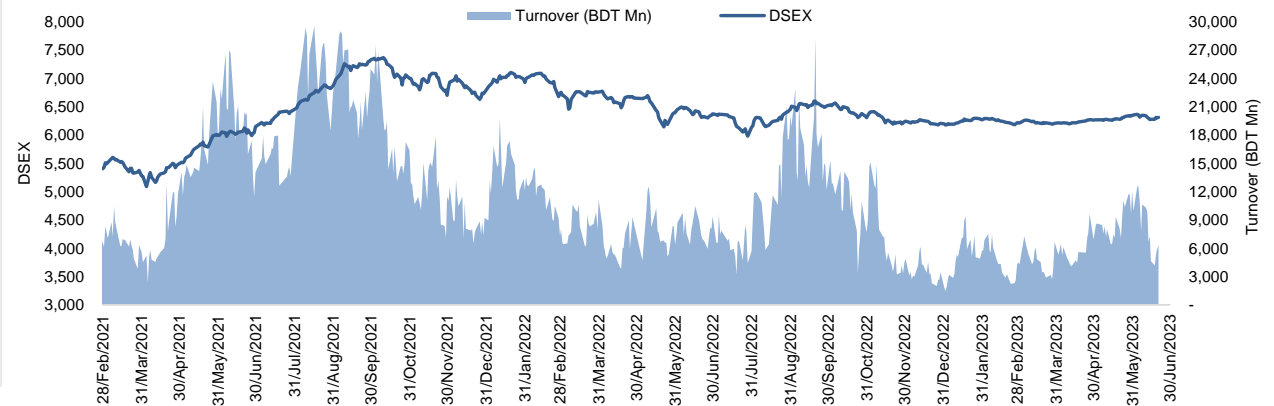


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.15%) gained 9.16 points and closed at 6,310.96. The blue-chip index DS30 (+0.06%), the Shariah-based index DSES (+0.22%), and the large-cap index CDSET (+0.03%) closed at 2,186.06, 1,370.47, and 1,209.98 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.24% followed by Fuel & Power (+0.09%), Food & Allied (+0.06%). NBF1 experienced the highest loss of 0.03% followed by Pharmaceutical (-0.02%), Bank (-0.01%). Block trades contributed 28.5% of the overall market turnover. Gemini Sea Food Ltd. (+1.7%) was the most traded share with a turnover of BDT 181 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,310.96	6,301.80	+9.16	+0.15%	+1.7%
DS30	2,186.06	2,184.82	+1.24	+0.06%	-0.4%
DSES	1,370.47	1,367.41	+3.06	+0.22%	+0.9%
CDSET	1,209.98	1,209.61	+0.37	+0.03%	-0.4%

	Advanced	Declined	Unchanged	Total
All Category	123	55	178	356
A Category (Equity)	73	40	123	236
B Category (Equity)	40	11	49	100
N Category (Equity)	2	2	1	5
Z Category (Equity)	8	2	5	15
Mutual Funds	2	1	24	27
Corporate Bonds	0	1	3	4
Treasury Bonds	0	3	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,708,499	7,704,916	+0.0%
	Mn USD	70,886	70,853	
Turnover	Mn BDT	6,302	5,910	+6.6%
	Mn USD	58	54	
Volume	Mn Shares	122	108	+12.1%
No. of Trade		131,343	147,353	-10.9%

* Average Interbank Exchange Rate is BDT 108.75 as of Jun 20, 2023

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Figure: Sectorial Turnover (BDT Mn)

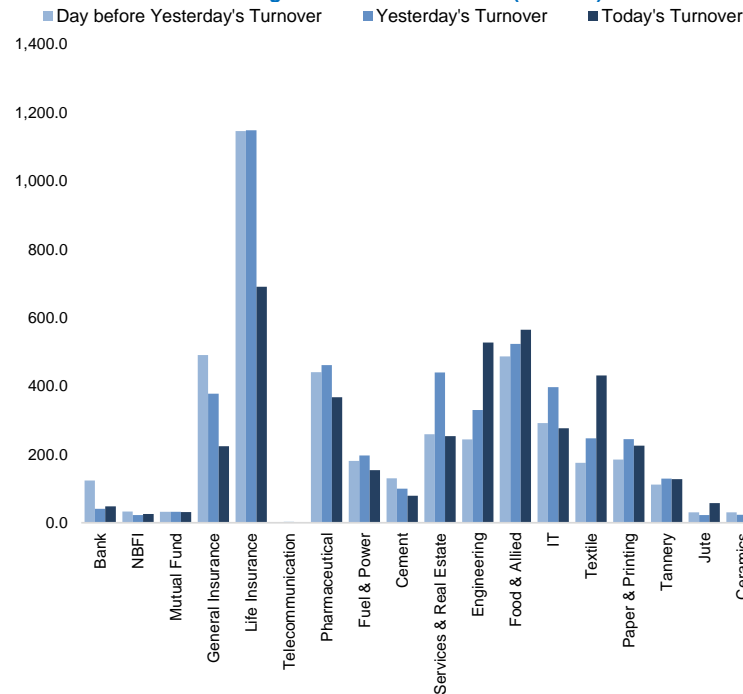
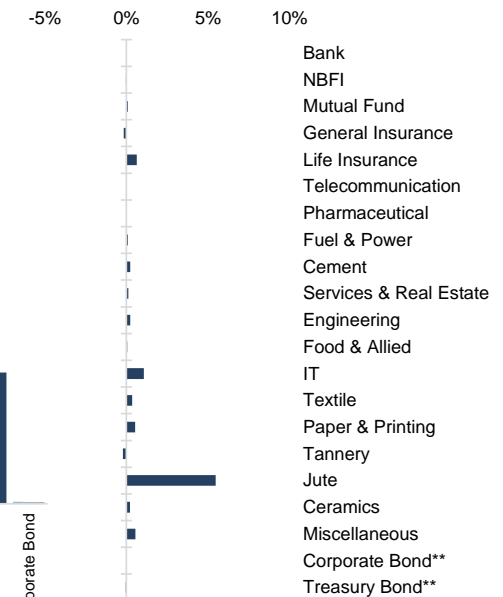


Figure: Sectorial Mcap Change



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	1,440	-0.16	-0.01%	35	678,508	9.0%	48.0	1.1%	11.8x	0.7x	GP	386,996	8.5%	1.5	13.0x	7.2x
NBFI	1,920	1,920	-0.54	-0.03%	23	186,805	2.5%	25.9	0.6%	NM	4.4x	WALTONHIL	317,378	7.0%	0.1	49.1x	3.2x
Mutual Fund	832	832	+0.78	+0.09%	37	37,641	0.5%	30.9	0.7%	NM	0.7x	BATBC	280,098	6.2%	0.3	15.3x	6.9x
General Insurance	3,319	3,324	-5.26	-0.16%	42	96,858	1.3%	224.1	5.0%	17.7x	1.5x	SQURPHARMA	185,977	4.1%	4.3	9.9x	1.7x
Life Insurance	3,022	3,002	+19.39	+0.65%	15	84,464	1.1%	690.6	15.3%	NM	NM	ROBI	157,138	3.5%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.7	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.7	38.0x	4.6x
Pharmaceutical	3,702	3,703	-0.60	-0.02%	34	718,118	9.6%	367.2	8.2%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,704	1,702	+1.52	+0.09%	23	449,423	6.0%	153.8	3.4%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	12.0x	1.2x
Cement	2,507	2,501	+6.20	+0.25%	7	120,414	1.6%	79.0	1.8%	30.6x	2.6x	BERGERPBL	82,989	1.8%	3.8	27.6x	6.4x
Services & Real Esta	1,980	1,978	+2.50	+0.13%	8	78,246	1.0%	253.8	5.6%	28.3x	1.0x	LHBL	78,160	1.7%	50.9	14.4x	3.9x
Engineering	4,518	4,508	+10.64	+0.24%	42	530,325	7.1%	527.1	11.7%	72.5x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,566	21,554	+12.98	+0.06%	21	399,063	5.3%	564.5	12.5%	20.0x	8.1x	BXPHARMA	65,222	1.4%	1.8	14.6x	1.5x
IT	3,237	3,203	+34.69	+1.08%	11	42,207	0.6%	276.2	6.1%	29.5x	3.0x	BRACBANK	57,596	1.3%	0.3	9.0x	0.9x
Textile	1,626	1,620	+5.83	+0.36%	58	170,258	2.3%	431.3	9.6%	83.9x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,899	10,840	+59.19	+0.55%	6	41,995	0.6%	225.9	5.0%	40.5x	2.1x	ISLAMIBANK	52,486	1.2%	1.0	8.9x	0.8x
Tannery	3,288	3,295	-6.69	-0.20%	6	34,727	0.5%	128.0	2.8%	50.0x	3.4x	DUTCHBANGL	44,203	1.0%	0.3	7.6x	1.0x
Jute	14,909	14,135	+773.65	+5.47%	3	3,647	0.0%	57.6	1.3%	NM	-1266.1x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	694	693	+1.51	+0.22%	5	32,099	0.4%	28.0	0.6%	49.1x	1.9x	UNILEVERCL	39,526	0.9%	2.6	44.9x	13.1x
Miscellaneous	4,180	4,157	+23.04	+0.55%	14	227,574	3.0%	383.9	8.5%	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%	3.8	0.1%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	-0.04	-0.05%	236	2,970,510	39.5%	1.5	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
OAL	11.0	+10.0%	31.5	NM	0.9x
PRIMELIFE	75.3	+9.1%	43.7	NM	NM
SIMTEX	21.8	+9.0%	103.2	24.0x	1.0x
IMAMBUTTON	128.8	+8.9%	26.5	NM	26.8x
NORTHERN	284.7	+8.7%	9.0	NM	3.5x
JUTESPINN	407.0	+8.7%	4.2	NM	NM
GQBALLPEN	144.8	+7.8%	62.6	NM	1x
RSRMSTEEL	22.4	+7.7%	26.6	NM	0.5x
AZIZPIPES	109.1	+7.1%	41.8	NM	NM
YPL	26.9	+6.7%	117.3	NM	5.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BGIC	54.2	-3.7%	1.5	35.0x	2.7x
APEXTANRY	119.1	-3.3%	11.0	NM	2x
CENTRALPHL	12.4	-3.1%	28.4	NM	2.1x
RUPALILIFE	208.1	-2.2%	83.7	NM	NM
ADVENT	28.4	-2.1%	63.8	26.8x	1.9x
NORTHRNINS	48.9	-2.0%	2.3	26.6x	2.1x
PARAMOUNT	46.0	-1.9%	8.1	26.3x	1.7x
MIDASFIN	10.7	-1.8%	0.7	8.1x	1.2x
NAVANAPHAR	109.9	-1.7%	101.4	25.0x	2.7x
NTC	437.2	-1.7%	3.7	NM	216.4x

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%	18.6x	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%	30.6x	12.2x
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
GEMINISEA	856.6	+1.7%	181.4	40.8x	33.8x
BSC	125.0	+0.2%	134.9	8.0x	1.6x
MEGHNALIFE	105.1	+1.6%	127.8	NM	NM
EHL	101.9	-1.6%	118.2	15.1x	1.3x
YPL	26.9	+6.7%	117.3	NM	5.0x
PAPERPROC	281.9	+3.7%	113.5	57.2x	8.3x
SIMTEX	21.8	+9.0%	103.2	24.0x	1.0x
TILIL	79.8	+4.2%	102.0	NM	NM
NAVANAPHAR	109.9	-1.7%	101.4	25.0x	2.7x
KBPPWBIL	17.8	+4.7%	94.2	NM	1.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RENATA	1,231.5	1,141.8	16.0	476	579.60
UNILEVERCL	2,046.4	2,046.4	3.0	245	501.37
SQURPHARMA	210.7	206.3	46.0	374	78.04
RENWICKJA	730.0	730.0	2.0	82	59.57
GP	261.6	261.6	28.0	202	52.79
BXPHARMA	146.6	139.3	16.0	332	48.27
MARICO	2,361.0	2,330.0	26.0	19	43.95
DUTCHBANGL	59.0	59.0	1.0	650	38.35
RDFOOD	52.3	49.0	15.0	764	37.70
FINEFOODS	107.0	100.0	7.0	281	29.50

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade	Important DSE News
RENATA	1,231.5	1,141.8	579.6	476	16	MTB Mr. Syed Manzur Elahi, one of the Sponsor Directors of the Company, has expressed his intention to buy 6,00,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange Ltd. within next 30 working days.
UNILEVERCL	2,046.4	2,046.4	501.4	245	3	
SQURPHARMA	210.7	206.3	78.0	374	46	
RENWICKJA	730.0	730.0	59.6	82	2	
GP	261.6	261.6	52.8	202	28	
BXPHARMA	146.6	139.3	48.3	332	16	
MARICO	2,361.0	2,330.0	44.0	19	26	
DUTCHBANGL	59.0	59.0	38.4	650	1	
RDFOOD	52.3	49.0	37.7	764	15	
FINEFOODS	107.0	100.0	29.5	281	7	
BRACBANK	36.0	36.0	27.9	774	1	
EBL	29.4	29.1	27.5	940	8	
SEAPEARL	215.0	215.0	23.0	107	4	
LRBDL	35.2	31.6	19.5	610	21	
AOL	36.6	32.9	17.4	514	9	
NAVANAPHAR	118.4	112.0	15.0	127	4	
EMERALDOIL	140.2	125.2	13.9	107	6	
BATBC	518.0	479.8	13.0	26	10	
EHL	103.0	98.0	9.4	94	2	
PRAGATILIF	139.8	139.8	8.4	60	1	
GPHISPAT	44.5	42.4	6.4	147	4	
DELTASPINN	8.5	8.5	5.9	700	1	
Total			1,799.0		361	

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

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