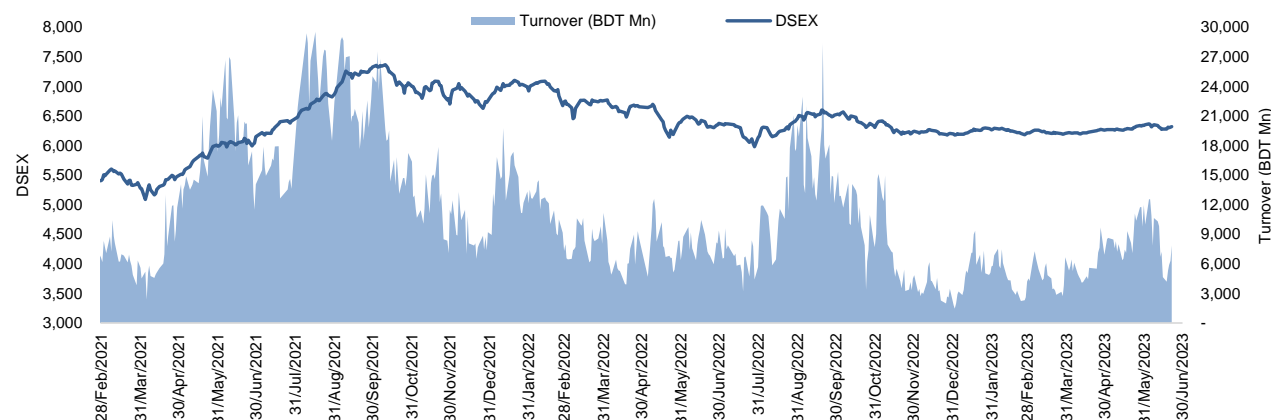


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.13%) gained 8.29 points and closed at 6,319.25. The blue-chip index DS30 (+0.08%), the Shariah-based index DSES (+0.16%), and the large-cap index CDSET (+0.10%) closed at 2,187.74, 1,372.73, and 1,211.16 points, respectively. Most of the large-cap sectors posted positive performance today. Bank booked the highest gain of 0.19% followed by NBFI (+0.16%), Pharmaceutical (+0.12%), Engineering (+0.07%), Fuel & Power (+0.02%), Telecommunication (0.00%), and Food & Allied (0.00%), respectively. Block trades contributed 25.2% of the overall market turnover. Gemini Sea Food Ltd. (-1.4%) was the most traded share with a turnover of BDT 229 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,319.25	6,310.96	+8.29	+0.13%	+1.8%
DS30	2,187.74	2,186.06	+1.68	+0.08%	-0.3%
DSES	1,372.73	1,370.47	+2.25	+0.16%	+1.0%
CDSET	1,211.16	1,209.98	+1.18	+0.10%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	102	76	190	368
A Category (Equity)	64	42	134	240
B Category (Equity)	29	29	45	103
N Category (Equity)	2	2	1	5
Z Category (Equity)	7	3	10	20
Mutual Funds	0	1	29	30
Corporate Bonds	0	0	0	0
Treasury Bonds	2	1	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,715,290	7,708,499	+0.1%
	Mn USD	71,253	71,190	
Turnover	Mn BDT	7,859	6,302	+24.7%
	Mn USD	73	58	
Volume	Mn Shares	185	122	+52.3%
No. of Trade		164,024	131,343	+24.9%

* Average Interbank Exchange Rate is BDT 108.28 as of Jun 21, 2023

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Figure: Sectorial Turnover (BDT Mn)

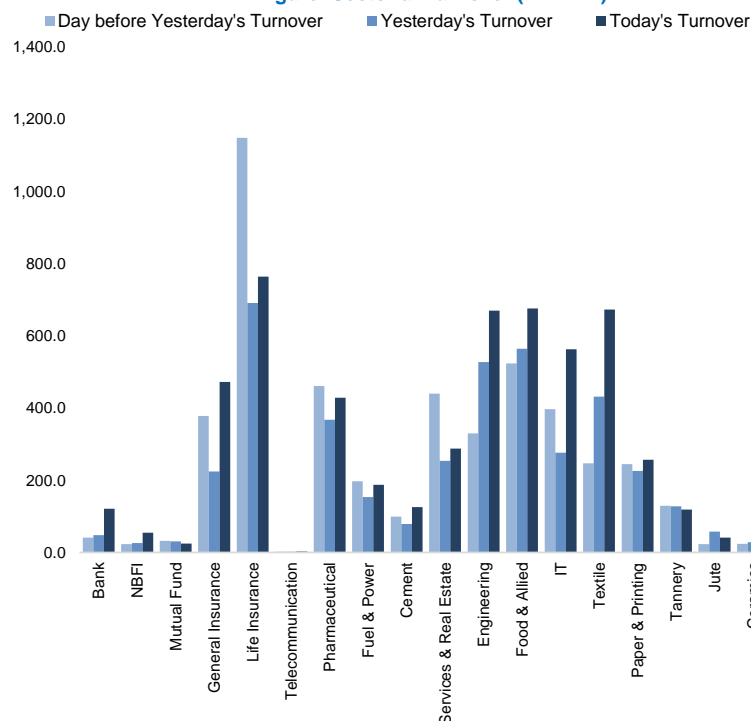
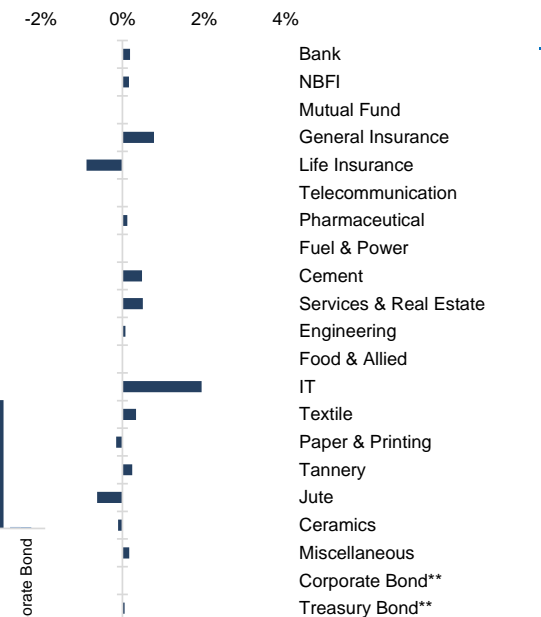


Figure: Sectorial Mcap Change



Market PE 18.4x

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	1,442	1,439	+2.69	+0.19%	35	679,775	9.0%	121.0	2.1%	11.8x	0.7x	GP	386,996	8.5%	1.7	13.0x	7.2x
NBFI	1,923	1,920	+3.15	+0.16%	23	187,112	2.5%	54.9	0.9%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	832	-0.04	-0.01%	37	37,639	0.5%	24.3	0.4%	NM	0.7x	BATBC	280,098	6.2%	1.3	15.3x	6.9x
General Insurance	3,344	3,319	+25.80	+0.78%	42	97,611	1.3%	471.9	8.0%	17.8x	1.5x	SQURPHARMA	185,977	4.1%	12.7	9.9x	1.7x
Life Insurance	2,995	3,022	-26.67	-0.88%	15	83,718	1.1%	764.2	13.0%	NM	NM	ROBI	157,138	3.5%	0.7	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	2.5	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.6	38.0x	4.6x
Pharmaceutical	3,707	3,702	+4.53	+0.12%	34	718,996	9.6%	428.6	7.3%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.3	16.7x	4.4x
Fuel & Power	1,704	1,704	+0.29	+0.02%	23	449,500	6.0%	187.6	3.2%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.1	12.0x	1.2x
Cement	2,519	2,507	+11.99	+0.48%	7	120,990	1.6%	125.5	2.1%	30.8x	2.6x	BERGERPBL	83,299	1.8%	4.4	27.7x	6.4x
Services & Real Estate	1,990	1,980	+9.86	+0.50%	8	78,636	1.0%	287.5	4.9%	28.5x	1.0x	LHBL	78,857	1.7%	98.9	14.6x	4.0x
Engineering	4,522	4,518	+3.37	+0.07%	42	530,721	7.1%	669.8	11.4%	72.6x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,566	21,566	-0.94	-0.00%	21	399,045	5.3%	675.8	11.5%	20.0x	8.1x	BXPHARMA	65,222	1.4%	0.7	14.6x	1.5x
IT	3,300	3,237	+62.81	+1.94%	11	43,026	0.6%	562.9	9.6%	30.1x	3.1x	BRACBANK	57,596	1.3%	0.5	9.0x	0.9x
Textile	1,631	1,626	+5.40	+0.33%	58	170,824	2.3%	672.6	11.4%	84.2x	1.1x	BEACONPHAR	56,595	1.2%	0.5	80.9x	9.2x
Paper & Printing	10,883	10,899	-16.55	-0.15%	6	41,931	0.6%	256.7	4.4%	40.4x	2.1x	ISLAMIBANK	52,486	1.2%	2.5	8.9x	0.8x
Tannery	3,296	3,288	+7.97	+0.24%	6	34,812	0.5%	118.9	2.0%	50.1x	3.4x	DUTCHBANGL	44,203	1.0%	0.1	7.6x	1.0x
Jute	14,816	14,909	-92.36	-0.62%	3	3,624	0.0%	41.0	0.7%	NM	-1258.2x	TITASGAS	40,459	0.9%	0.2	32.0x	0.6x
Ceramics	693	694	-0.74	-0.11%	5	32,065	0.4%	40.1	0.7%	49.1x	1.9x	UNILEVERCL	39,688	0.9%	3.7	45.1x	13.2x
Miscellaneous	4,187	4,180	+7.13	+0.17%	14	227,962	3.0%	355.8	6.1%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,380	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.2	12.1x	0.9x
Treasury Bond**	93	93	+0.05	+0.06%	236	2,972,153	39.5%	12.8	0.2%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
OAL	12.1	+10.0%	110.2	NM	1.0x
KBPPWBIL	19.5	+9.6%	126.8	NM	1.6x
ZAHEENSPIN	11.0	+7.8%	53.1	NM	2.2x
MIDASFIN	11.5	+7.5%	3.7	8.7x	1.2x
MIDLANDBNK	12.8	+6.7%	39.3	13.2x	1.0x
METROSPIN	37.1	+6.6%	106.4	38.0x	1.8x
APOLOISPAT	8.7	+6.1%	102.9	NM	0x
UNIONCAP	8.8	+6.0%	15.3	NM	NM
KPPL	13.7	+5.4%	64.2	NM	NM
ITC	42.0	+4.5%	145.6	18.8x	2.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GQBALLPEN	136.6	-5.7%	42.0	NM	1.1x
TILIL	76.6	-4.0%	142.8	NM	NM
NTC	420.5	-3.8%	4.4	NM	208.2x
BDAUTOCA	153.4	-3.7%	14.3	NM	21.1x
SONALILIFE	95.8	-3.6%	70.1	NM	NM
MEGHNALIFE	101.3	-3.6%	147.0	NM	NM
BDWELDING	24.0	-3.2%	7.3	NM	2.1x
PAPERPROC	273.7	-2.9%	100.8	55.5x	8.1x
BANGAS	152.5	-2.6%	36.1	NM	7.3x
POPULARLIF	79.1	-2.6%	27.1	NM	NM

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%	14.6x	4.0x
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%	30.9x	12.3x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	15,220	0.9%	15.0x	1.1x
PRIMEBANK	14,248	0.8%	5.6x	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	844.6	-1.4%	229.3	40.3x	33.3x
MEGHNALIFE	101.3	-3.6%	147.0	NM	NM
ITC	42.0	+4.5%	145.6	18.8x	2.3x
TILIL	76.6	-4.0%	142.8	NM	NM
EHL	101.5	-0.4%	139.1	15.0x	1.3x
SIMTEX	21.7	-0.5%	129.6	23.8x	1.0x
KBPPWBIL	19.5	+9.6%	126.8	NM	1.6x
NAVANAPHAR	113.7	+3.5%	123.1	25.8x	2.8x
CITYGENINS	46.7	+3.5%	121.5	19.5x	2.4x
GENEXIL	84.5	+1.6%	120.8	24.9x	4.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BXPHARMA	146.2	138.0	12.0	3,898	569.59
UNILEVERCL	2,046.4	2,046.4	4.0	255	521.83
RUNNERAUTO	48.4	48.4	1.0	2,387	115.55
SQURPHARMA	209.0	206.4	77.0	436	90.63
EMERALDOIL	136.9	124.0	11.0	525	65.23
GP	273.0	261.6	37.0	198	52.01
AL-HAJTEX	177.0	152.7	17.0	303	51.88
BATBC	518.7	479.8	15.0	89	44.80
RUPALILIFE	208.0	190.5	10.0	211	43.14
BRACBANK	35.9	32.3	5.0	1,022	35.79

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BXPHARMA	146.2	138.0	569.6	3,898	12
UNILEVERCL	2,046.4	2,046.4	521.8	255	4
RUNNERAUTO	48.4	48.4	115.5	2,387	1
SQURPHARMA	209.0	206.4	90.6	436	77
EMERALDOIL	136.9	124.0	65.2	525	11
GP	273.0	261.6	52.0	198	37
AL-HAJTEX	177.0	152.7	51.9	303	17
BATBC	518.7	479.8	44.8	89	15
RUPALILIFE	208.0	190.5	43.1	211	10
BRACBANK	35.9	32.3	35.8	1,022	5
IBNSINA	286.6	286.6	34.4	120	1
RENATA	1,220.0	1,141.8	29.2	24	8
ADVENT	31.2	28.7	27.0	930	3
LRBDL	33.0	31.6	25.1	791	20
CNATEX	9.5	9.3	24.3	2,558	13
BSCCL	218.9	199.9	20.2	93	2
PTL	81.8	69.3	19.2	255	10
SIMTEX	23.2	23.2	17.4	749	2
BERGERPBL	1,789.4	1,789.4	14.9	8	1
KDSALTD	76.5	70.0	11.0	147	8
GEMINISEA	895.0	795.0	9.0	10	8
AB BANK	9.0	9.0	9.0	1,000	2
Total			1,984.3		389

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

SAMATALETH

(Q1 Un-audited): EPS was Tk. (0.03) for July-September 2022 as against Tk. (0.02) for July-September 2021. NOCFPS was Tk. (0.05) for July-September 2022 as against Tk. (0.07) for July-September 2021. NAV per share was Tk. 14.28 as on September 30, 2022 and Tk. 14.30 as on June 30, 2022.

SHAHJABANK

Refer to their earlier news disseminated by DSE on 19.06.2023 regarding Sale declaration of a sponsor named Alhaj Tofazzal Hossain, Shahjalal Islami Bank Limited informed DSE that Company Secretary of the bank did not acknowledge the aforesaid declaration in due process. Therefore, the declaration for selling of 25,00,000 shares by Alhaj Tofazzal Hossain will no longer be considered as valid.

SQURPHARMA

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Square Pharmaceuticals PLC.' instead of 'Square Pharmaceuticals Limited' with effect from June 22, 2023. Other things (except name) will remain unchanged.

SQUARETEXT

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Square Textiles PLC.' instead of 'Square Textiles Limited' with effect from June 22, 2023. Other things (except name) will remain unchanged.

STANDBANKL

Mr. Haji Md. Shamsul Alam, one of the Sponsor Directors of the Company, has expressed his intention to buy 3,00,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange Ltd. within next 30 working days.

ETL

Referring to the earlier news disseminated on 23.05.2023, the company has informed that the Board of Directors have decided to issue ordinary shares to the shareholders of Evitex Fashions Limited, the transferor company, at a ratio of 1:1.8 at face value subject to the consent of BSEC. In this regard, the company will issue 7,92,000 Nos. of Ordinary Shares to the transferor company's shareholders at a rate of Face Value BDT 10/- after getting consent from BSEC.

RUNNERAUTO

Refer to their earlier news disseminated by DSE on 11.05.2023 regarding decision to issue of Unsecured, Redeemable, Non-Convertible, Guaranteed, Sustainability Bond of TK. 2,67,50,00,000.00, the company has further informed that BSEC has given consent in this regard.

BANKASIA

Ms. Zakia Rouf Chowdhury has been appointed as Nominated Director of Amiran Generations Limited in the Board of Bank Asia Limited and subsequently Bangladesh Bank has approved her directorship on 20.06.2023.

RUPALIBANK

The company has informed that the Board of Directors agreed on issuance of Unsecured, Non-convertible, and Fully Redeemable Floating Rate Subordinated Bond amounting BDT 1,200.00 crore for 7 Years as part of Regulatory Capital on a meeting held on 07-11-2022, subject to receiving all regulatory approvals. In this regard, Bangladesh Bank has issued their NOC regarding the issuance of BDT 1,200.00 crore Unsecured, Non-convertible, and Fully Redeemable Floating Rate Subordinated Bond for 7 Years.

DBLPBOND

Dhaka Bank Ltd, issuer of Dhaka Bank Perpetual Bond has informed that the Trustee of the bond has approved the semi-annual coupon payment @10.00% p.a. for the period from February 01, 2023 to July 31, 2023. Record Date for entitlement of Coupon of the Bond: 20.07.2023.

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