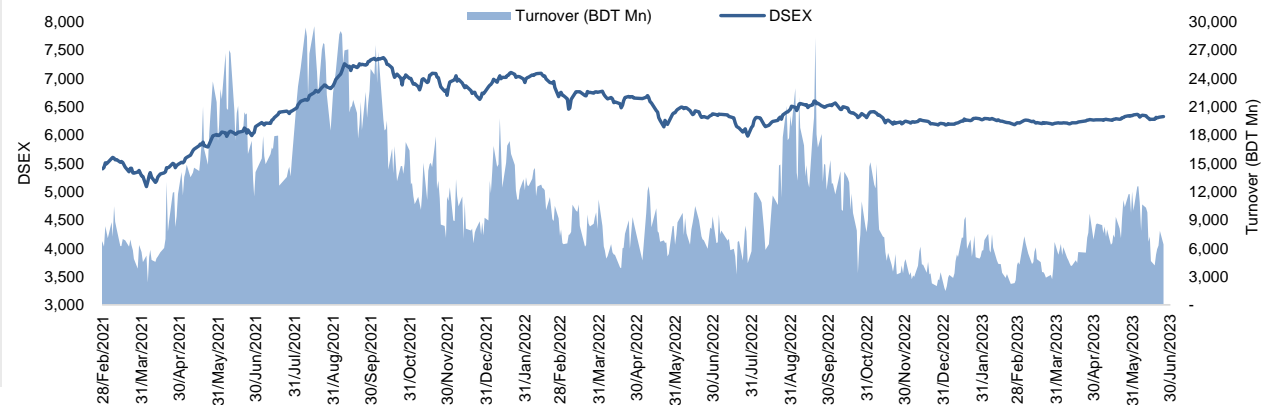


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.10%) gained 6.46 points and closed at 6,325.71. The blue-chip index DS30 (+0.10%), the Shariah-based index DSES (+0.14%), and the large-cap index CDSET (+0.11%) closed at 2,189.95, 1,374.65, and 1,212.45 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.22% followed by Pharmaceutical (+0.09%), NBF1 (+0.08%), Bank (+0.07%), Fuel & Power (+0.03%), Telecommunication (0.00%), and Engineering (-0.04%), respectively. Block trades contributed 25.8% of the overall market turnover. Navana Pharmaceuticals Limited (+4.6%) was the most traded share with a turnover of BDT 416 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,325.71	6,319.25	+6.46	+0.10%	+1.9%
DS30	2,189.95	2,187.74	+2.21	+0.10%	-0.2%
DSES	1,374.65	1,372.73	+1.92	+0.14%	+1.2%
CDSET	1,212.45	1,211.16	+1.29	+0.11%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	87	93	179	359
A Category (Equity)	58	47	127	232
B Category (Equity)	23	33	42	98
N Category (Equity)	0	4	1	5
Z Category (Equity)	6	9	9	24
Mutual Funds	1	1	27	29
Corporate Bonds	1	1	2	4
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,711,842	7,715,290	-0.0%
	Mn USD	71,159	71,191	
Turnover	Mn BDT	6,392	7,859	-18.7%
	Mn USD	59	73	
Volume	Mn Shares	118	185	-36.5%
No. of Trade		125,890	164,024	-23.2%

* Average Interbank Exchange Rate is BDT 108.38 as of Jun 22, 2023

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Figure: Sectorial Turnover (BDT Mn)

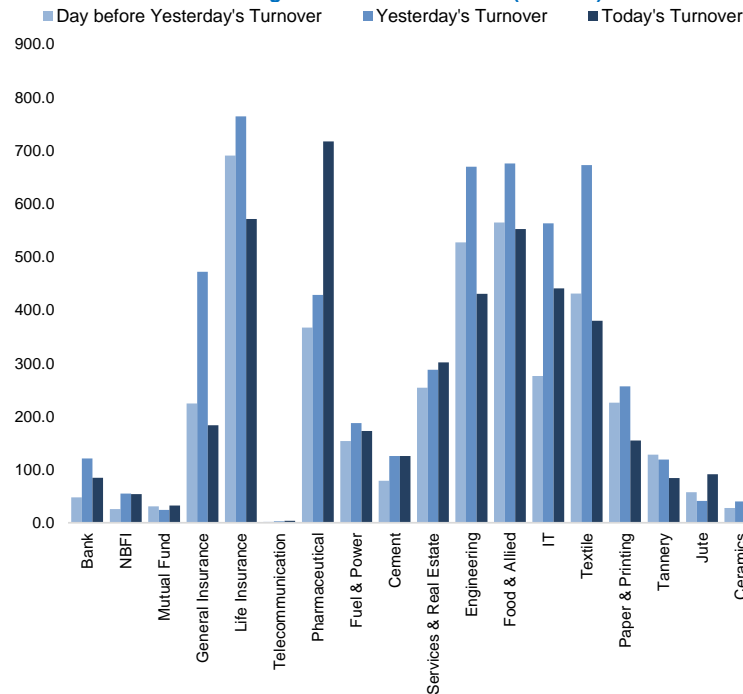
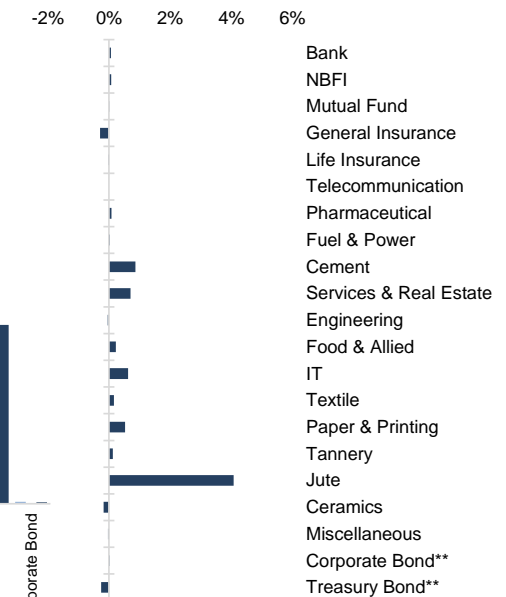


Figure: Sectorial Mcap Change



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	1,443	1,442	+0.97	+0.07%	35	680,233	9.0%	84.4	1.8%	11.8x	0.7x	GP	386,996	8.5%	3.5	13.0x	7.2x
NBFI	1,924	1,923	+1.51	+0.08%	23	187,259	2.5%	53.9	1.1%	NM	4.4x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	832	+0.04	+0.01%	37	37,641	0.5%	32.3	0.7%	NM	0.7x	BATBC	280,098	6.2%	2.9	15.3x	6.9x
General Insurance	3,335	3,344	-9.74	-0.29%	42	97,327	1.3%	183.3	3.9%	17.8x	1.5x	SQURPHARMA	185,977	4.1%	18.7	9.9x	1.7x
Life Insurance	2,995	2,995	-0.62	-0.02%	15	83,701	1.1%	571.4	12.0%	NM	NM	ROBI	157,138	3.5%	0.2	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	3.7	0.1%	16.9x	4.3x	RENATA	139,689	3.1%	1.1	38.0x	4.6x
Pharmaceutical	3,710	3,707	+3.16	+0.09%	34	719,609	9.6%	717.0	15.1%	19.4x	2.3x	UPGDCL	135,475	3.0%	1.1	16.7x	4.4x
Fuel & Power	1,705	1,704	+0.48	+0.03%	23	449,626	6.0%	172.6	3.6%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.2	12.0x	1.2x
Cement	2,541	2,519	+21.75	+0.86%	7	122,035	1.6%	125.5	2.6%	31.0x	2.6x	BERGERPBL	83,197	1.8%	7.2	27.6x	6.4x
Services & Real Esta	2,004	1,990	+14.14	+0.71%	8	79,194	1.1%	301.4	6.4%	28.7x	1.0x	LHBL	79,902	1.8%	109.3	14.8x	4.0x
Engineering	4,520	4,522	-1.74	-0.04%	42	530,518	7.1%	430.5	9.1%	72.6x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,614	21,566	+48.23	+0.22%	21	399,938	5.3%	552.6	11.6%	20.1x	8.2x	BXPHARMA	65,222	1.4%	1.4	14.6x	1.5x
IT	3,321	3,300	+20.58	+0.62%	11	43,294	0.6%	440.8	9.3%	30.3x	3.1x	BRACBANK	57,596	1.3%	0.5	9.0x	0.9x
Textile	1,634	1,631	+2.61	+0.16%	58	171,097	2.3%	379.9	8.0%	84.3x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,941	10,883	+57.65	+0.53%	6	42,153	0.6%	154.7	3.3%	40.7x	2.1x	ISLAMIBANK	52,486	1.2%	1.9	8.9x	0.8x
Tannery	3,300	3,296	+4.37	+0.13%	6	34,858	0.5%	83.9	1.8%	50.2x	3.4x	DUTCHBANGL	44,203	1.0%	24.0	7.6x	1.0x
Jute	15,420	14,816	+604.03	+4.08%	3	3,772	0.1%	91.2	1.9%	NM	-1309.5x	TITASGAS	40,459	0.9%	0.2	32.0x	0.6x
Ceramics	692	693	-1.20	-0.17%	5	32,009	0.4%	26.7	0.6%	49.0x	1.9x	UNILEVERCL	40,164	0.9%	4.4	45.6x	13.3x
Miscellaneous	4,186	4,187	-1.28	-0.03%	14	227,892	3.0%	336.5	7.1%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.02	+0.02%	10	36,591	0.5%	2.7	0.1%	NM	NM	SUMITPOWER	36,308	0.8%	0.6	12.1x	0.9x
Treasury Bond**	93	93	-0.24	-0.26%	236	2,964,540	39.4%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FINEFOODS	123.3	+8.3%	61.1	NM	11.7x
KBPPWBIL	21.1	+8.2%	152.7	NM	1.8x
SONALIANSH	464.2	+8.2%	74.0	NM	4.0x
OAL	13.0	+7.4%	76.8	NM	1.1x
SIMTEX	23.3	+7.4%	31.2	25.6x	1.0x
UNIONCAP	9.4	+6.8%	31.5	NM	NM
METROSPIN	39.1	+5.4%	92.4	40.0x	2x
AZIZPIPES	112.0	+5.1%	36.1	NM	NM
NAVANAPHAR	118.9	+4.6%	415.9	27.0x	2.9x
EHL	105.5	+3.9%	139.1	15.6x	1.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SHURWID	17.3	-9.9%	15.2	NM	1.3x
RSRMSTEEL	20.3	-9.8%	15.2	NM	0x
NORTHERN	256.5	-8.7%	15.8	NM	3.1x
ADVENT	26.4	-6.4%	108.3	24.9x	1.8x
APOLOISPAT	8.2	-5.7%	6.8	NM	0.4x
DHAKAINS	57.3	-4.2%	7.6	19.0x	1.6x
SKTRIMS	28.3	-4.1%	22.4	25.0x	1.8x
SONALILIFE	92.4	-3.5%	75.0	NM	NM
KPPL	13.3	-2.9%	37.3	NM	NM
ZAHEENSPIN	10.7	-2.7%	25.3	NM	2.1x

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%	14.8x	4.0x
EBL	24,998	1.5%	6.9x	0.9x
OLYMPIC	19,683	1.1%	18.8x	3.1x
NBL	19,116	1.1%	NM	0.7x
PUBALIBANK	18,314	1.1%	4.7x	0.6x
CITYBANK	18,211	1.1%	5.5x	0.8x
SEAPEARL	16,847	1.0%	30.7x	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
NAVANAPHAR	118.9	+4.6%	415.9	27.0x	2.9x
KBPPWBIL	21.1	+8.2%	152.7	NM	1.8x
ITC	43.1	+2.6%	150.9	19.3x	2.4x
EHL	105.5	+3.9%	139.1	15.6x	1.4x
EMERALDOIL	138.7	+0.9%	138.7	NM	NM
RUPALILIFE	216.0	+2.9%	114.9	NM	NM
LHBL	68.8	+1.3%	109.3	14.8x	4.0x
ADVENT	26.4	-6.4%	108.3	24.9x	1.8x
GEMINISEA	822.9	-2.6%	106.6	39.2x	32.4x
BSC	125.1	+0.2%	103.6	8.0x	1.6x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RENATA	1,226.0	1,141.8	6.0	480	584.17
UNILEVERCL	2,046.4	2,046.4	2.0	266	544.57
RUPALILIFE	216.7	206.0	12.0	410	87.33
GP	273.0	261.6	19.0	148	40.01
ANWARGALV	207.1	194.7	5.0	145	29.76
BEXIMCO	115.1	104.1	11.0	269	29.12
PTL	83.0	69.3	29.0	390	29.03
AOL	36.5	32.9	11.0	851	28.84
BDFINANCE	44.1	44.1	1.0	560	24.70
BRACBANK	32.3	32.3	10.0	724	23.40

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RENATA	1,226.0	1,141.8	584.2	480	6
UNILEVERCL	2,046.4	2,046.4	544.6	266	2
RUPALILIFE	216.7	206.0	87.3	410	12
GP	273.0	261.6	40.0	148	19
ANWARGALV	207.1	194.7	29.8	145	5
BEXIMCO	115.1	104.1	29.1	269	11
PTL	83.0	69.3	29.0	390	29
AOL	36.5	32.9	28.8	851	11
BDFINANCE	44.1	44.1	24.7	560	1
BRACBANK	32.3	32.3	23.4	724	10
SALVOCHEM	61.8	55.7	21.2	354	9
SQURPHARMA	209.0	208.0	15.2	73	23
EBL	29.5	29.3	14.5	494	6
SIMTEX	23.7	22.7	13.9	588	6
PREBPBOND	5,020.0	5,020.0	12.6	3	1
BATBC	518.0	479.8	12.0	24	10
EMERALDOIL	125.0	124.0	9.1	73	4
BBSCABLES	45.5	45.0	8.0	177	9
HRTEX	116.1	104.4	7.6	67	7
AL-HAJTEX	164.5	155.2	7.4	46	7
EHL	98.0	98.0	6.7	69	1
ORIONPHARM	79.5	71.7	6.5	88	10
Total			1,646.7		283

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

NURANI

The Company will be placed in 'Z' category from existing 'A' category with effect from today i. e. June 25, 2023 due to non-compliance of provision 1 of BSEC Order No. SEC/CMRRCD/2009-193/08 dated September 1, 2020.

NORTHERN

The Company will be placed in 'Z' category from existing 'A' category with effect from today i. e. June 25, 2023 due to non-compliance of provision 1 of BSEC Order No. SEC/CMRRCD/2009-193/08 dated September 1, 2020.

APOLOISPAT

The Company will be placed in 'Z' category from existing 'B' category with effect from today i. e. June 25, 2023 due to non-compliance of provision 1 of BSEC Order No. SEC/CMRRCD/2009-193/08 dated September 1, 2020.

SHURWID

The Company will be placed in 'Z' category from existing 'A' category with effect from today i. e. June 25, 2023 due to non-compliance of provision 1 of BSEC Order No. SEC/CMRRCD/2009-193/08 dated September 1, 2020.

RSRMSTEEL

The Company will be placed in 'Z' category from existing 'A' category with effect from today i. e. June 25, 2023 due to non-compliance of provision 1 of BSEC Order No. SEC/CMRRCD/2009-193/08 dated September 1, 2020.

SHAHJABANK

Mr. Fakir Akhtaruzzaman, one of the Directors of the Company, has further informed that he has completed his buying of 632 shares of the company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 18.06.2023.

MATINSPINN

The company has informed that the Board of Directors has re-appointed Mr. Md. Abdus Salam, FCA, FCS, as Independent Director of the company with effect from April 29, 2023.

UTTARAFIN

The company has informed that the Board of Directors has accepted the resignation of Mr. Dr. Md. Moinur Rahman Chowdhury, BPM (BAR), one of the independent directors of the company.

DHAKABANK

The Company has informed that the Board of Directors has re-elected Mr. Abdul Hai Sarker as Chairman and Mr. Md. Aman Ullah Sarker as Vice Chairman of the Board of Directors of the company.

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