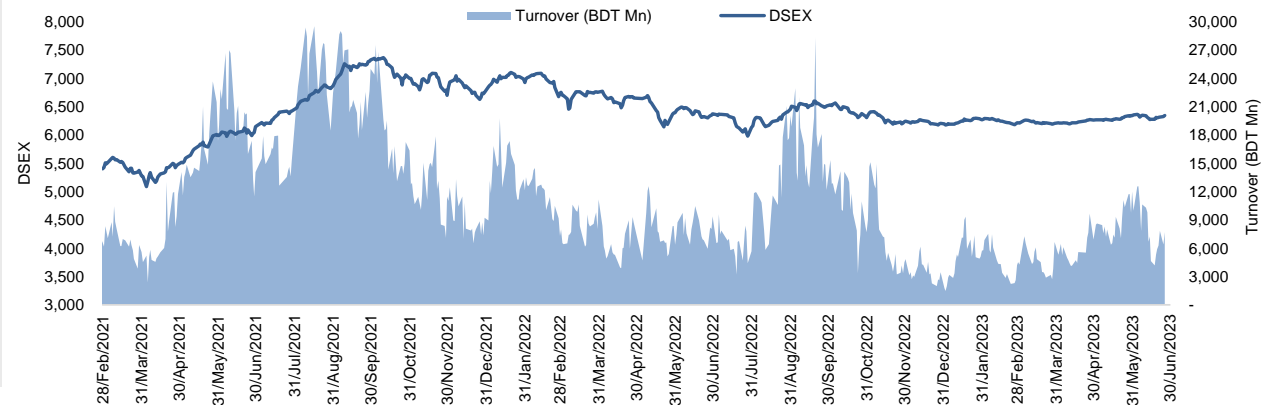


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.29%) gained 18.38 points and closed at 6,344.09. The blue-chip index DS30 (+0.13%), the Shariah-based index DSES (+0.17%), and the large-cap index CDSET (+0.09%) closed at 2,192.82, 1,377.00, and 1,213.52 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.17% followed by Fuel & Power (+0.11%), NBF1 (+0.08%), Pharmaceutical (+0.06%). Engineering experienced the highest loss of 0.04% followed by Food & Allied (-0.01%), Telecommunication (0.00%). Block trades contributed 21.6% of the overall market turnover. Khan Brothers PP Woven Bag Industries Limited (+10.0%) was the most traded share with a turnover of BDT 204 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,344.09	6,325.71	+18.38	+0.29%	+2.2%
DS30	2,192.82	2,189.95	+2.87	+0.13%	-0.1%
DSES	1,377.00	1,374.65	+2.35	+0.17%	+1.3%
CDSET	1,213.52	1,212.45	+1.07	+0.09%	-0.1%

	Advanced	Declined	Unchanged	Total
All Category	125	48	197	370
A Category (Equity)	80	25	137	242
B Category (Equity)	35	17	48	100
N Category (Equity)	3	0	2	5
Z Category (Equity)	7	6	10	23
Mutual Funds	2	1	29	32
Corporate Bonds	1	0	3	4
Treasury Bonds	2	0	0	2

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,720,780	7,711,842	+0.1%
	Mn USD	71,045	70,962	
Turnover	Mn BDT	7,704	6,392	+20.5%
	Mn USD	71	59	
Volume	Mn Shares	182	118	+55.1%
No. of Trade		153,853	125,890	+22.2%

* Average Interbank Exchange Rate is BDT 108.68 as of Jun 25, 2023

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Figure: Sectorial Turnover (BDT Mn)

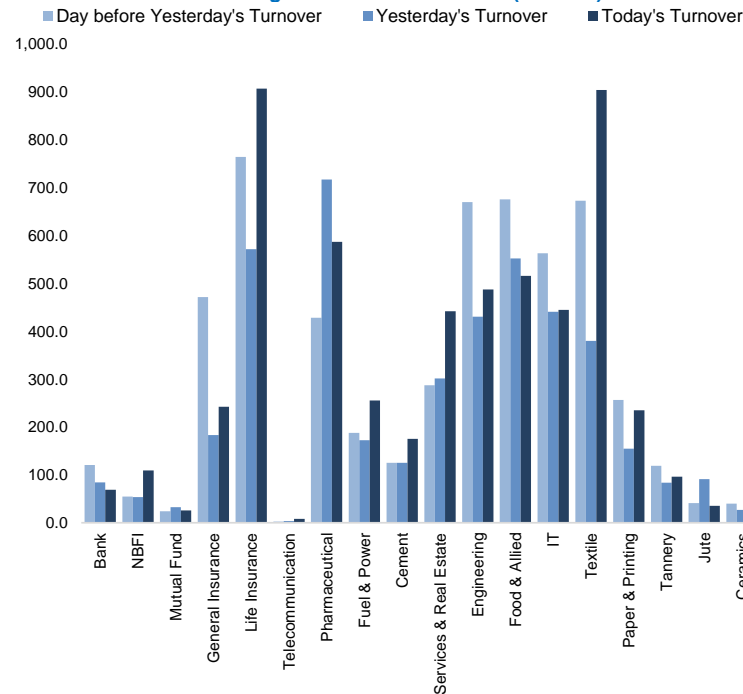
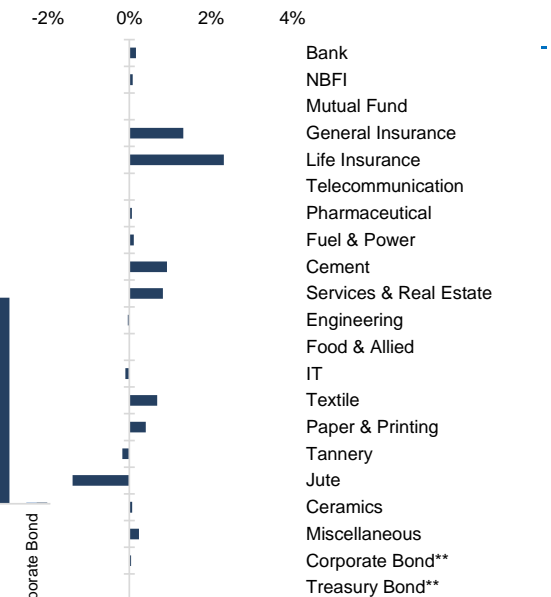


Figure: Sectorial Mcap Change



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	1,445	1,443	+2.40	+0.17%	35	681,366	9.0%	68.7	1.1%	11.8x	0.7x	GP	386,996	8.5%	6.8	13.0x	7.2x
NBFI	1,926	1,924	+1.61	+0.08%	23	187,416	2.5%	109.6	1.8%	NM	4.4x	WALTONHIL	317,378	7.0%	0.1	49.1x	3.2x
Mutual Fund	832	832	+0.01	+0.00%	37	37,641	0.5%	25.9	0.4%	NM	0.7x	BATBC	280,098	6.1%	7.2	15.3x	6.9x
General Insurance	3,379	3,335	+44.19	+1.33%	42	98,616	1.3%	242.4	4.0%	18.0x	1.5x	SQURPHARMA	185,977	4.1%	27.0	9.9x	1.7x
Life Insurance	3,064	2,995	+69.34	+2.32%	15	85,639	1.1%	907.2	15.0%	NM	NM	ROBI	157,138	3.4%	0.8	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	8.2	0.1%	16.9x	4.3x	RENATA	139,689	3.1%	1.0	38.0x	4.6x
Pharmaceutical	3,712	3,710	+2.25	+0.06%	34	720,046	9.6%	587.1	9.7%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.3	16.7x	4.4x
Fuel & Power	1,706	1,705	+1.87	+0.11%	23	450,119	6.0%	255.7	4.2%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.4	12.0x	1.2x
Cement	2,564	2,541	+23.44	+0.92%	7	123,161	1.6%	175.2	2.9%	31.3x	2.7x	BERGERPBL	83,197	1.8%	0.0	27.6x	6.4x
Services & Real Esta	2,021	2,004	+16.53	+0.82%	8	79,847	1.1%	441.9	7.3%	27.2x	1.0x	LHBL	80,715	1.8%	135.8	14.9x	4.1x
Engineering	4,518	4,520	-1.74	-0.04%	42	530,314	7.0%	487.7	8.1%	72.5x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,613	21,614	-1.26	-0.01%	21	399,914	5.3%	516.0	8.5%	20.1x	8.2x	BXPHARMA	65,222	1.4%	0.8	14.6x	1.5x
IT	3,318	3,321	-3.23	-0.10%	11	43,252	0.6%	445.1	7.4%	30.3x	3.1x	BRACBANK	57,596	1.3%	0.4	9.0x	0.9x
Textile	1,645	1,634	+11.13	+0.68%	58	172,262	2.3%	904.1	15.0%	84.9x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,985	10,941	+44.01	+0.40%	6	42,323	0.6%	234.8	3.9%	40.8x	2.1x	ISLAMIBANK	52,486	1.2%	2.8	8.9x	0.8x
Tannery	3,295	3,300	-5.51	-0.17%	6	34,800	0.5%	96.4	1.6%	50.1x	3.4x	DUTCHBANGL	44,203	1.0%	1.4	7.6x	1.0x
Jute	15,206	15,420	-214.37	-1.39%	3	3,720	0.0%	35.4	0.6%	NM	-1291.3x	TITASGAS	40,459	0.9%	0.2	32.0x	0.6x
Ceramics	693	692	+0.51	+0.07%	5	32,032	0.4%	40.7	0.7%	48.3x	1.9x	UNILEVERCL	40,276	0.9%	9.3	45.8x	13.4x
Miscellaneous	4,196	4,186	+10.03	+0.24%	14	228,438	3.0%	430.7	7.1%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	+0.04	+0.04%	10	36,599	0.5%	2.5	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.9	12.1x	0.9x
Treasury Bond**	93	93	+0.00	+0.00%	236	2,964,584	39.4%	28.4	0.5%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	23.2	+10.0%	203.8	NM	1.9x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	KBPPWBIL	23.2	+10.0%	203.8	NM	1.9x
ETL	10.4	+9.5%	46.6	94.5x	0.8x	BATBC	74,086	4.3%	15.3x	6.9x	SEAPEARL	211.1	-0.3%	195.6	30.6x	12.2x
DACCADYE	15.1	+9.4%	43.3	NM	0.4x	BEXIMCO	69,196	4.0%	12.0x	1.2x	NAVANAPHAR	116.8	-1.8%	177.0	26.5x	2.9x
IMAMBUTTON	138.1	+9.2%	18.1	NM	28.7x	RENATA	68,042	4.0%	38.0x	4.6x	INTRACO	48.6	+5.0%	160.1	32.3x	3.8x
NITOLINS	39.8	+7.3%	2.5	20.2x	1.3x	BXPHARMA	45,564	2.6%	14.6x	1.5x	RUPALILIFE	229.8	+6.4%	156.2	NM	NM
KPPL	14.2	+6.8%	70.7	NM	NM	BEACONPHAR	39,617	2.3%	80.9x	9.2x	MEGHNALIFE	105.3	+4.4%	145.7	NM	NM
CNATEX	11.4	+6.5%	108.1	NM	1x	GP	38,700	2.2%	13.0x	7.2x	PRIMELIFE	80.3	+4.4%	145.5	NM	NM
ZAHEENSPIN	11.4	+6.5%	86.0	NM	2.2x	BRACBANK	30,976	1.8%	9.0x	0.9x	LHBL	69.5	+1.0%	135.8	14.9x	4.1x
RUPALILIFE	229.8	+6.4%	156.2	NM	NM	LHBL	26,980	1.6%	14.9x	4.1x	BSC	126.4	+1.0%	129.4	8.1x	1.6x
PROGRESLIF	98.0	+5.6%	40.3	NM	NM	EBL	24,998	1.5%	6.9x	0.9x	EHL	104.4	-1.0%	129.2	15.5x	1.3x
						OLYMPIC	19,683	1.1%	18.7x	3.1x						
						NBL	19,116	1.1%	NM	0.7x						
						PUBALIBANK	18,314	1.1%	4.8x	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%	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.

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
UNILEVERCL	2,083.8	2,046.4	435.4	212	4
RENATA	1,217.9	1,141.8	266.6	219	7
BSCCL	231.0	199.8	143.3	655	8
IBNSINA	286.6	286.6	135.6	473	2
GP	285.0	261.6	117.1	447	113
RUPALILIFE	227.1	199.0	77.6	353	10
SQURPHARMA	209.8	208.4	51.3	245	55
BXPHERMA	146.2	146.2	44.2	302	4
BATBC	518.7	479.8	42.6	84	19
RENWICKJA	730.0	730.0	29.2	40	2
BATASHOE	1,026.0	1,026.0	28.7	28	1
SAIFPOWER	29.3	26.8	24.2	836	6
ORIONINFU	360.0	360.0	21.6	60	1
RDFOOD	50.5	50.0	20.7	412	10
SQUARETEXT	67.4	67.4	16.9	250	1
SONALIPAPR	645.0	582.0	15.5	25	3
BEXIMCO	115.2	104.3	15.0	140	6
MARICO	2,370.0	2,355.0	13.6	6	10
DHAKABANK	12.5	12.5	11.3	908	2
PTL	70.0	69.3	10.9	157	15
ORIONPHARM	85.0	71.7	8.2	108	11
GEMINISEA	868.0	830.0	7.5	9	5
Total			1,660.7		404

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

FUWANGCER

(Q3 Un-audited): EPS was Tk. 0.13 for January-March 2023 as against Tk. 0.06 for January-March 2022; EPS was Tk. 0.25 for July 2022-March 2023 as against Tk. 0.23 for July 2021-March 2022. NOCFPS was Tk. (4.49) for July 2022-March 2023 as against Tk. (1.65) for July 2021-March 2022. NAV per share was Tk. 11.90 as on March 31, 2023 and Tk. 11.78 as on June 30, 2022.

CLICL

(Q1 Un-audited): As per consolidated life revenue account of the company for January to March 2023, total revenue was BDT 692,536,504 and total expense was BDT 189,836,863 as on March 31, 2023 and total revenue was BDT 527,009,963 and total expense was BDT 139,483,641 as on March 31, 2022. Accordingly, Balance of Life Insurance Fund as on March 31, 2023 was BDT 502,699,641 as against BDT 387,526,322 as on March 31, 2022 resulting a net increase of BDT 115,173,319.

The company has informed that the Board of Directors has resolved the decision to purchase commercial floor space of 6474 sft at 5th floor of Hilton Tower, 176, Monohorpur, Rajgonj, Cumilla at the price of BDT 3,630/- per sft totaling to BDT 2,35,00,000/-, subject to the approval from the IDRA and legal opinion from the panel lawyer of the company.

BDSERVICE

(Q3 Un-audited): EPS was Tk. (0.07) for January-March 2023 as against Tk. (2.14) for January-March 2022; EPS was Tk. (3.06) for July 2022-March 2023 as against Tk. (7.66) for July 2021-March 2022. NOCFPS was Tk. 3.80 for July 2022-March 2023 as against Tk. (3.02) for July 2021-March 2022. NAV per share (with revaluation) was Tk. 239.98 as on March 31, 2023 and Tk. 243.04 as on June 30, 2022.

EBL

The company has informed that the Board of Directors has agreed in principle to purchase an Exchange House in Dubai, United Arab Emirates, subject to the approval of the respective Regulatory Authorities (both at home and abroad).

MERCANBANK

Mr. S. M. Shafiqul Islam Mamun, one of the Sponsors of the company, has expressed his intention to sell 2,19,546 shares out of his holding of 32,56,217 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange Limited within next 30 working days.

SHAHJABANK

Mr. Akkas Uddin Mollah, one of the Sponsor Directors of Shahjalal Islami Bank Ltd., has expressed his intention to sell 2,17,00,000 shares out of his holding of 4,40,07,124 shares of the company at prevailing market price (in the Block Market) through Chittagong Stock Exchange within next 30 working days, started from June 22, 2023.

MEGHNAINS

The Company has informed that the Board of Directors has re-appointed Mr. Musfiq Rahman as Chairman and Mr. Manwar-Uz-Zaman as the new Vice Chairmen of the Company.

OLYMPIC

The company has informed that the Board of Directors has appointed Mr. Ahad Mohammad Bhai and Mr. Asar Aziz M. Bhai (Nominated Director of M/s Ambee Limited) as new Directors of the company with immediate effect.

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ISLAMICFIN

The Company will be placed in 'B' category from existing 'A' category with effect from July 02, 2023 as the Company has approved 5% cash dividend for the year ended December 31, 2022.

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