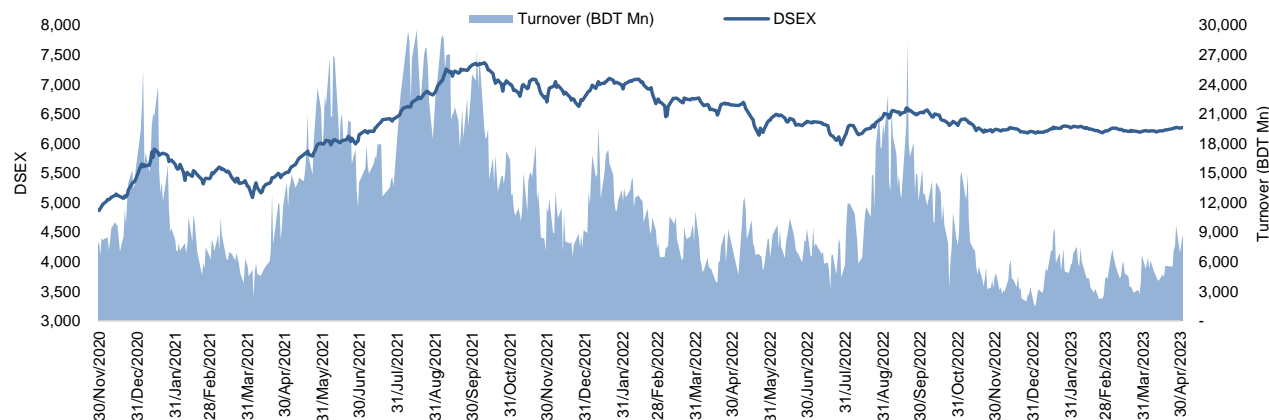


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.11%) lost 6.68 points and closed at 6,272.43. The blue-chip index DS30 (-0.18%), the Shariah-based index DSES (-0.11%), and the large-cap index CDSET (-0.06%) closed at 2,194.35, 1,372.00, and 1,211.77 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.27% followed by Fuel & Power (-0.07%), Engineering (-0.06%), Pharmaceutical (-0.06%), NBFi (-0.03%), Telecommunication (0.00%), and Bank (+0.10%), respectively. Block trades contributed 6.0% of the overall market turnover. Eastern Housing Limited (+4.1%) was the most traded share with a turnover of BDT 368 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,272.43	6,279.11	-6.68	-0.11%	+1.1%
DS30	2,194.35	2,198.41	-4.05	-0.18%	-0.0%
DSES	1,372.00	1,373.57	-1.58	-0.11%	+1.0%
CDSET	1,211.77	1,212.47	-0.70	-0.06%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	85	77	197	359
A Category (Equity)	58	40	141	239
B Category (Equity)	21	31	48	100
N Category (Equity)	4	0	1	5
Z Category (Equity)	2	6	7	15
Mutual Funds	1	0	22	23
Corporate Bonds	0	0	4	4
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,661,067	7,667,224	-0.1%
	Mn USD	71,259	71,316	
Turnover	Mn BDT	7,986	7,218	+10.6%
	Mn USD	74	67	
Volume	Mn Shares	149	156	-4.3%
No. of Trade		192,111	174,649	+10.0%

* Average Interbank Exchange Rate is BDT 107.51 as of May 10, 2023

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Figure: Sectorial Turnover (BDT Mn)

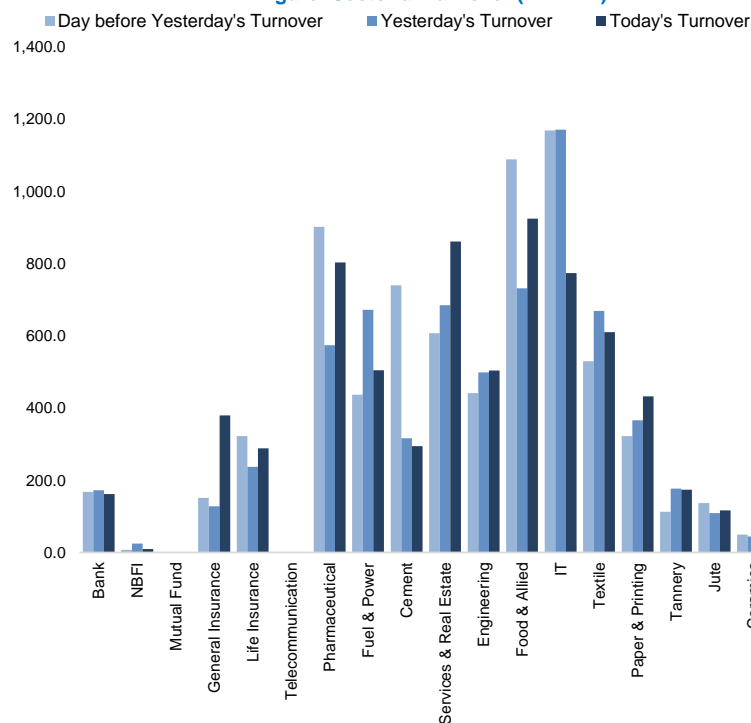
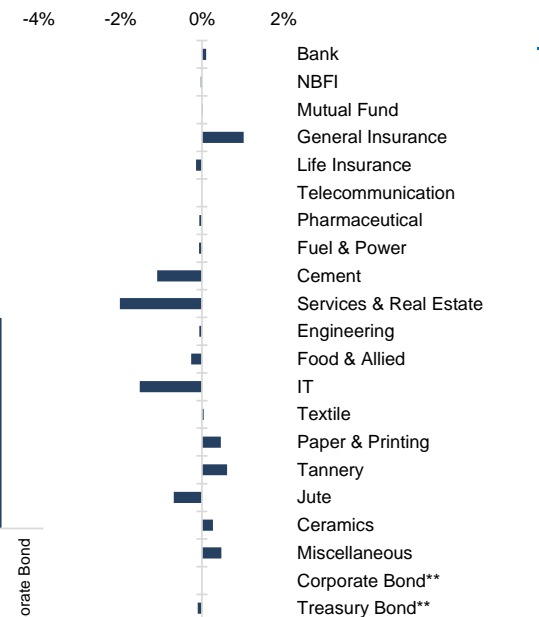


Figure: Sectorial Mcap Change



Market PE 20.9x

Market PB 1.5x

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	1,457	1,455	+1.49	+0.10%	35	687,123	9.1%	162.1	2.2%	11.4x	0.7x	GP	386,996	8.5%	0.7	12.9x	7.2x
NBFI	1,919	1,919	-0.53	-0.03%	23	186,696	2.5%	9.4	0.1%	NM	4.3x	WALTONHIL	317,378	7.0%	0.0	40.4x	3.2x
Mutual Fund	826	825	+0.15	+0.02%	37	37,331	0.5%	1.5	0.0%	NM	0.7x	BATBC	280,098	6.2%	1.5	15.7x	6.9x
General Insurance	3,114	3,082	+31.55	+1.02%	42	90,874	1.2%	379.2	5.1%	15.8x	1.4x	SQURPHARM/	185,977	4.1%	2.6	9.7x	1.7x
Life Insurance	2,540	2,543	-3.60	-0.14%	14	70,991	0.9%	288.2	3.8%	NM	NM	ROBI	157,138	3.5%	0.2	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.0	0.0%	16.8x	4.3x	RENATA	139,689	3.1%	3.5	31.1x	4.6x
Pharmaceutical	3,691	3,693	-2.36	-0.06%	34	715,895	9.5%	802.9	10.7%	18.5x	2.3x	UPGDCL	135,475	3.0%	0.0	15.4x	4.4x
Fuel & Power	1,702	1,703	-1.16	-0.07%	23	448,827	6.0%	504.5	6.7%	18.0x	1.1x	BEXIMCO	103,571	2.3%	3.7	9.0x	1.2x
Cement	2,546	2,574	-28.20	-1.10%	7	122,275	1.6%	294.2	3.9%	60.9x	2.6x	BERGERPBL	83,680	1.8%	12.3	28.3x	7.0x
Services & Real Estate	2,081	2,124	-42.79	-2.01%	8	82,208	1.1%	861.1	11.5%	39.2x	1.1x	LHBL	78,625	1.7%	181.9	17.7x	4.0x
Engineering	4,495	4,498	-2.90	-0.06%	42	527,622	7.0%	503.6	6.7%	56.3x	1.8x	ICB	74,119	1.6%	0.2	NM	1.7x
Food & Allied	21,582	21,639	-57.41	-0.27%	21	399,344	5.3%	924.1	12.3%	20.7x	8.2x	BXPHERMA	65,222	1.4%	0.2	14.1x	1.5x
IT	3,358	3,410	-52.08	-1.53%	11	43,774	0.6%	773.4	10.3%	32.6x	3.2x	BRACBANK	61,940	1.4%	0.3	10.3x	1.0x
Textile	1,617	1,616	+0.72	+0.04%	58	170,435	2.3%	609.8	8.1%	44.0x	1.1x	BEACONPHAR	56,595	1.2%	0.0	60.3x	9.2x
Paper & Printing	10,733	10,684	+49.80	+0.47%	6	41,355	0.5%	432.1	5.8%	40.8x	2.1x	ISLAMIBANK	53,130	1.2%	7.4	8.6x	0.8x
Tannery	3,253	3,233	+19.91	+0.62%	6	34,352	0.5%	173.7	2.3%	46.0x	3.4x	DUTCHBANGL	43,554	1.0%	3.2	7.7x	1.0x
Jute	15,346	15,453	-106.93	-0.69%	3	3,754	0.0%	116.6	1.6%	NM	6.0x	TITASGAS	40,459	0.9%	0.0	13.2x	0.6x
Ceramics	687	685	+1.83	+0.27%	5	31,784	0.4%	82.5	1.1%	41.6x	1.9x	UNILEVERCL	39,243	0.9%	4.7	53.7x	13.0x
Miscellaneous	4,184	4,164	+19.97	+0.48%	14	227,818	3.0%	582.7	7.8%	13.5x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,390	0.5%	0.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.3	10.7x	0.9x
Treasury Bond**	93	94	-0.10	-0.10%	252	2,988,531	39.7%	0.1	0.0%	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
AGRANINS	37.9	+11.8%	14.3	19.0x	1.9x	SQURPHARMA	121,499	7.1%	9.7x	1.7x	EHL	115.1	+4.1%	368.4	18.1x	1.5x
MIRACLEIND	31.9	+10.0%	47.8	NM	1.0x	BATBC	74,086	4.3%	15.7x	6.9x	BSC	130.9	+2.3%	365.9	8.8x	1.6x
JUTESPINN	303.2	+8.6%	12.4	NM	NM	BEXIMCO	69,196	4.1%	9.0x	1.2x	INTRACO	39.1	-1.0%	288.4	25.8x	3.0x
STANCERAM	120.8	+7.5%	9.2	NM	51.8x	RENATA	68,042	4.0%	31.1x	4.6x	SEAPEARL	211.3	-8.1%	206.8	51.3x	12.2x
ICICL	31.2	+7.2%	69.0	34.5x	2.0x	BEACONPHAR	48,413	2.8%	60.3x	9.2x	ORIONINFU	357.5	+0.7%	197.9	NM	25.9x
SAMORITA	77.6	+5.3%	65.2	NM	1.6x	BXPHARMA	45,564	2.7%	14.1x	1.5x	GEMINISEA	912.1	-0.5%	188.6	65.0x	35.9x
LIBRAINFU	705.5	+4.9%	13.2	NM	1x	GP	38,700	2.3%	12.9x	7.2x	LHBL	67.7	-0.6%	181.9	17.7x	4.0x
PAPERPROC	233.1	+4.9%	143.4	54.3x	6.9x	BRACBANK	30,976	1.8%	10.3x	1.0x	UNIQUEHRL	76.4	+0.8%	170.3	17.0x	0.9x
YPL	19.5	+4.8%	60.5	NM	3.6x	LHBL	26,980	1.6%	17.7x	4.0x	GENEXIL	92.3	-0.3%	169.2	27.9x	4.8x
TAMIJTEX	197.9	+4.7%	74.3	29.4x	2.2x	ISLAMIBANK	24,166	1.4%	8.6x	0.8x	APEXFOODS	490.1	-1.9%	155.3	64.4x	3.9x
						NBL	19,116	1.1%	NM	0.7x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	PUBALIBANK	18,525	1.1%	4.7x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPEARL	211.3	-8.1%	206.8	51.3x	12.2x	CITYBANK	18,211	1.1%	5.5x	0.8x	ALARABANK	25.0	25.0	1.0	2,960	73.99
AGNISYSL	29.1	-5.8%	138.8	25.8x	2x	SEAPEARL	18,067	1.1%	51.3x	12.2x	SONALIPAPR	655.9	585.0	10.0	80	49.22
AAMRANET	76.2	-4.7%	122.3	23.9x	2.0x	OLYMPIC	17,642	1.0%	21.8x	3.4x	SIBL	12.3	12.3	1.0	3,777	46.46
HEIDELBCEM	304.4	-4.6%	83.3	NM	4.5x	ROBI	15,714	0.9%	85.7x	2.3x	GEMINISEA	901.3	890.0	3.0	34	29.91
SKTRIMS	26.4	-4.3%	25.9	24.7x	1.7x	ALARABANK	14,483	0.9%	13.0x	1.1x	SQURPHARMA	204.0	192.0	27.0	132	26.67
INTECH	26.2	-4.0%	14.9	NM	23.2x	BSRMLTD	14,210	0.8%	NM	0.7x	KDSALTD	77.0	73.3	23.0	342	25.57
IMAMBUTTON	87.3	-4.0%	5.7	NM	18.1x	PRIMEBANK	13,766	0.8%	5.3x	0.6x	PTL	77.1	71.0	9.0	302	23.03
ECABLES	215.2	-3.8%	73.7	85.7x	0.6x	UPGDCL	13,547	0.8%	15.4x	4.4x	AOL	37.0	32.9	3.0	557	20.50
GBBPOWER	17.8	-3.8%	23.6	19.1x	0.9x						SEAPEARL	234.7	222.7	2.0	85	19.48
UNIONCAP	7.9	-3.7%	7.7	NM	NM						BEXIMCO	114.6	104.1	11.0	119	12.92

* 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

* 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
ALARABANK	25.0	25.0	74.0	2,960	1
SONALIPAPR	655.9	585.0	49.2	80	10
SIBL	12.3	12.3	46.5	3,777	1
GEMINISEA	901.3	890.0	29.9	34	3
SQURPHARMA	204.0	192.0	26.7	132	27
KDSALTD	77.0	73.3	25.6	342	23
PTL	77.1	71.0	23.0	302	9
AOL	37.0	32.9	20.5	557	3
SEAPEARL	234.7	222.7	19.5	85	2
BEXIMCO	114.6	104.1	12.9	119	11
OLYMPIC	173.0	173.0	12.0	69	1
METROSPIN	43.3	41.0	9.0	209	4
RENATA	1,230.0	1,230.0	8.4	7	1
PRAGATILIF	116.0	116.0	7.9	68	2
LRBDL	31.6	31.6	7.7	243	4
UNIONINS	48.1	42.7	7.5	164	5
ITC	41.7	41.7	7.3	175	1
BATBC	479.8	479.8	7.1	15	8
GP	261.6	261.6	6.1	23	7
ORIONPHARM	80.1	72.5	5.4	73	8
AGNISYSL	30.5	30.5	5.3	174	6
NPOLYMER	47.1	45.9	5.3	114	9
Total			482.8		234

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
EASTLAND		0.0%	10%	Record Date	14-May-23
CRYSTALINS		0.0%	10%	Record Date	14-May-23
ISLAMIINS		0.0%	13%	Record Date	15-May-23
NHFIL		0.0%	15%	Record Date	15-May-23
JANATAINS		0.0%	11%	Record Date	16-May-23
EXIMBANK		0.0%	10%	Record Date	16-May-23
NITOLINS		0.0%	11%	Record Date	17-May-23
DUTCHBANGL		7.5%	18%	Record Date	17-May-23
ASIAINS		0.0%	11%	Record Date	18-May-23
BATASHOE		0.0%	365%	Record Date	18-May-23
TAKAFULINS		0.0%	12%	Record Date	18-May-23
ASIAPACINS		0.0%	15%	Record Date	18-May-23
UCB		5.0%	5%	Record Date	18-May-23
FIRSTSBANK		10.0%	0%	Record Date	21-May-23
SBACBANK		0.0%	4%	Record Date	21-May-23
MERCINS		0.0%	10%	Record Date	21-May-23
CONTININS		0.0%	10%	Record Date	22-May-23

Important DSE News

AGRANINS

The Board of Directors has recommended 8% Cash and 7% Stock Dividend for the year ended December 31, 2022. The Stock Dividend is subject to the approval of BSEC. Date of AGM: 12.07.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 31.05.2023. The Company has also reported Consolidated EPS of Tk. 1.99, Consolidated NAV per share of Tk. 20.17 and Consolidated NOCFPS of Tk. 0.54 for the year ended December 31, 2022 as against Tk. 1.68, Tk. 19.84 and Tk. 1.37 respectively for the year ended December 31, 2021.

KARNAPHULI

(Q1 Un-audited): EPS was Tk. 0.63 for January-March 2023 as against Tk. 0.59 for January-March 2022. NOCFPS was Tk. 0.92 for January-March 2023 as against Tk. 0.93 for January-March 2022. NAV per share was Tk. 21.34 as on March 31, 2023 and Tk. 20.78 as on March 31, 2022.

SIBL

(Q1 Un-audited): Consolidated EPS was Tk. 0.15 for January-March 2023 as against Tk. 0.13 for January-March 2022. Consolidated NOCFPS was Tk. (5.83) for January-March 2023 as against Tk. 4.93 for January-March 2022. Consolidated NAV per share was Tk. 20.34 as on March 31, 2023 and Tk. 18.89 as on March 31, 2022.

PREMIERBAN

(Q1 Un-audited): Consolidated EPS was Tk. 0.64 for January-March 2023 as against Tk. 0.59 for January-March 2022. Consolidated NOCFPS was Tk. 6.20 for January-March 2023 as against Tk. 1.03 for January-March 2022. Consolidated NAV per share was Tk. 22.28 as on March 31, 2023 and Tk. 20.11 as on March 31, 2022.

PUBALIBANK

(Q1 Un-audited): Consolidated EPS was Tk. 1.33 for January-March 2023 as against Tk. 1.19 for January-March 2022. Consolidated NOCFPS was Tk. (5.58) for January-March 2023 as against Tk. 1.19 for January-March 2022. Consolidated NAV per share was Tk. 43.06 as on March 31, 2023 and Tk. 40.00 as on March 31, 2022.

PHENIXINS

(Q1 Un-audited): EPS was Tk. 0.67 for January-March 2023 as against Tk. 0.80 for January-March 2022. NOCFPS was Tk. 0.60 for January-March 2023 as against Tk. 0.82 for January-March 2022. NAV per share was Tk. 37.52 as on March 31, 2023 and Tk. 37.10 as on December 31, 2022.

MERCANBANK

(Q1 Un-audited): Consolidated EPS was Tk. 0.63 for January-March 2023 as against Tk. 0.82 for January-March 2022. Consolidated NOCFPS was Tk. 1.86 for January-March 2023 as against Tk. 1.21 for January-March 2022. Consolidated NAV per share was Tk. 24.24 as on March 31, 2023 and Tk. 23.71 as on December 31, 2022.

ONEBANKLTD

(Q1 Un-audited): Consolidated EPS was Tk. 0.28 for January-March 2023 as against Tk. 0.43 (restated) for January-March 2022. Consolidated NOCFPS was Tk. 0.34 for January-March 2023 as against Tk. 4.21(restated) for January-March 2022. Consolidated NAV per share was Tk. 19.34 as on March 31, 2023 and Tk. 19.15 as on December 31, 2022.

SKICL

(Q1 Un-audited): EPS was Tk. 0.67 for January-March 2023 as against Tk. 0.95 for January-March 2022; NOCFPS was Tk. 2.43 for January-March 2023 as against Tk. 2.23 for January-March 2022. NAV per share was Tk. 20.85 as on March 31, 2023 and Tk. 20.17 as on December 31, 2022.

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SHEPHERD

(Q3 Un-audited): EPS was Tk. 0.19 for January-March 2023 as against Tk. 0.40 for January-March 2022; EPS was Tk. 0.59 for July 2022-March 2023 as against Tk. 1.01 for July 2021-March 2022. NOCFPS was Tk. 5.33 for July 2022-March 2023 as against Tk. 1.58 for July 2021-March 2022. NAV per share was Tk. 15.36 as on March 31, 2023 and Tk. 15.25 as on June 30, 2022.

DBH

(Q1 Un-audited): EPS was Tk. 1.34 for January-March 2023 as against Tk. 1.59 for January-March 2022; NOCFPS was Tk. 8.09 for January-March 2023 as against Tk. (11.19) for January-March 2022. NAV per share was Tk. 42.34 as on March 31, 2023 and Tk. 41.00 as on December 31, 2022.

BATBC

(Q1 Un-audited): EPS was Tk. 8.44 for January-March 2023 as against Tk. 7.73 for January-March 2022. NOCFPS was Tk. (2.09) for January-March 2023 as against Tk. 6.11 for January-March 2022. NAV per share was Tk. 74.71 as on March 31, 2023 and Tk. 60.86 as on March 31, 2022.

RUNNERAUTO

The company has informed that the Board of directors has given consent to the proposal for raising fund through issuance of "Runner Auto Internationally Certified Sustainability Bond" with the basic feature of Unsecured, Redeemable, Non-Convertible, Guaranteed, Sustainability Bond with the indicative issue size of USD 25.00 Million equivalent of BDT 265.00 Crore (Approx.) through private placement to the potential investors (i.e., Banks, Insurance Companies, Financial Institutions, Corporate Houses, NRBS and HNI). The yield of issue will range from 8.5% to 9% per annum with up to 7-year maturity. The company has further informed that The proceeds from Bond issuance will be used to augment Runner's customer base through a credit support mechanism, which will enable wider range of customers to acquire LPG/CNG/Electric 3-Wheeler ("3W"). It will also be used for the construction of 4MW rooftop solar plant for the 3W manufacturing facility. Green Delta Capital Limited is the Lead Arranger and Advisor to the Transaction issue and DBH Finance PLC is the Trustee of the issue.

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