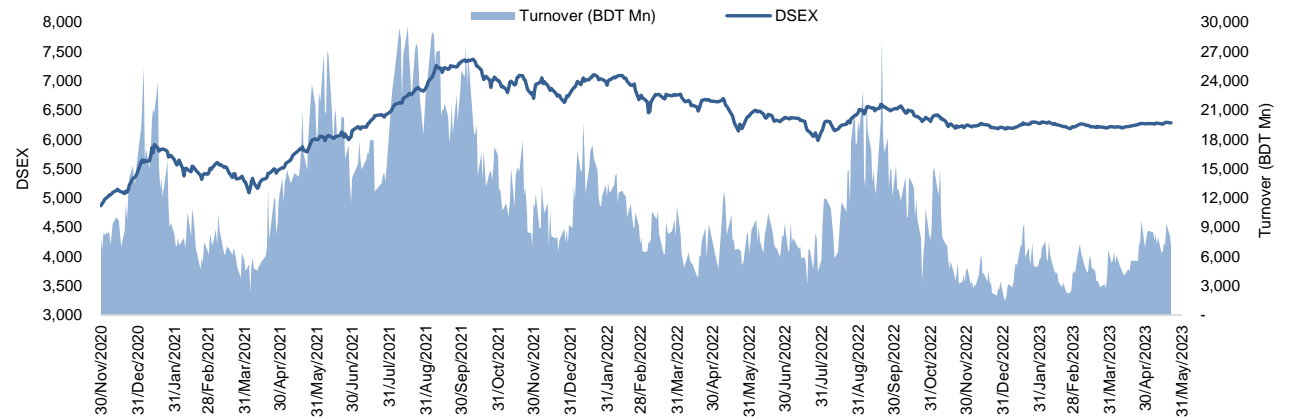


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.01%) gained 0.36 points and closed at 6,281.65. The blue-chip index DS30 (-0.01%), the Shariah-based index DSES (+0.02%), and the large-cap index CDSET (-0.03%) closed at 2,190.60, 1,366.48, and 1,210.78 points, respectively. Most of the large-cap sectors posted positive performance today. Bank booked the highest gain of 0.19% followed by Food & Allied (+0.11%), Engineering (+0.06%), NBFIs (+0.05%), Pharmaceutical (+0.02%), Telecommunication (0.00%), and Fuel & Power (-0.14%), respectively. Block trades contributed 4.4% of the overall market turnover. Bangladesh Shipping Corporation (-0.2%) was the most traded share with a turnover of BDT 524 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,281.65	6,281.30	+0.36	+0.01%	+1.2%
DS30	2,190.60	2,190.91	-0.30	-0.01%	-0.2%
DSES	1,366.48	1,366.23	+0.25	+0.02%	+0.6%
CDSET	1,210.78	1,211.20	-0.42	-0.03%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	74	100	178	352
A Category (Equity)	40	68	131	239
B Category (Equity)	24	30	41	95
N Category (Equity)	2	2	1	5
Z Category (Equity)	8	0	5	13
Mutual Funds	1	1	28	30
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,703,635	7,701,299	+0.0%
	Mn USD	71,001	70,980	
Turnover	Mn BDT	7,074	8,117	-12.9%
	Mn USD	65	75	
Volume	Mn Shares	143	159	-9.7%
No. of Trade		173,223	192,706	-10.1%

\* Average Interbank Exchange Rate is BDT 108.50 as of May 21, 2023

<b>Fahim Hassan</b> Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	<b>Md. Tanvir Ahmed</b> Research Associate (880) 1708805201 mtanvir.ahmed@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

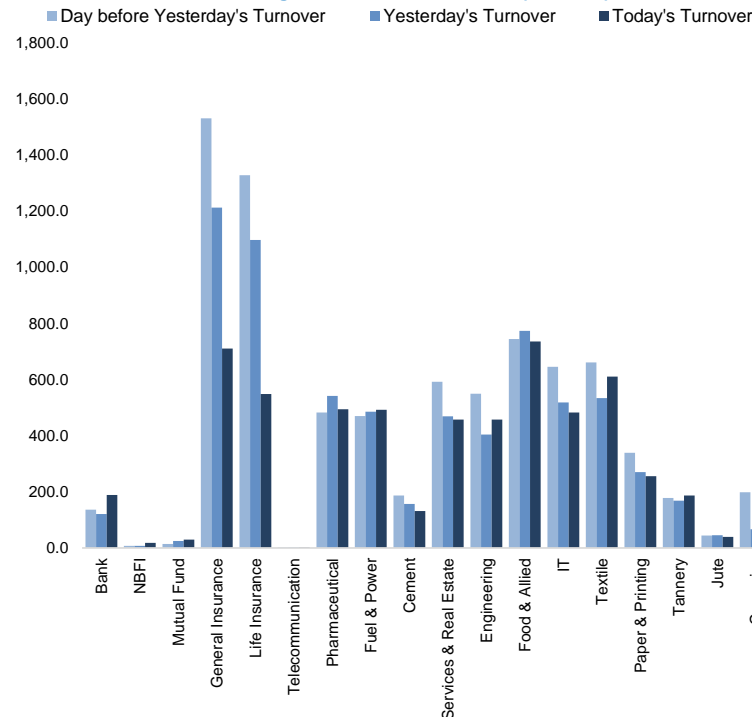
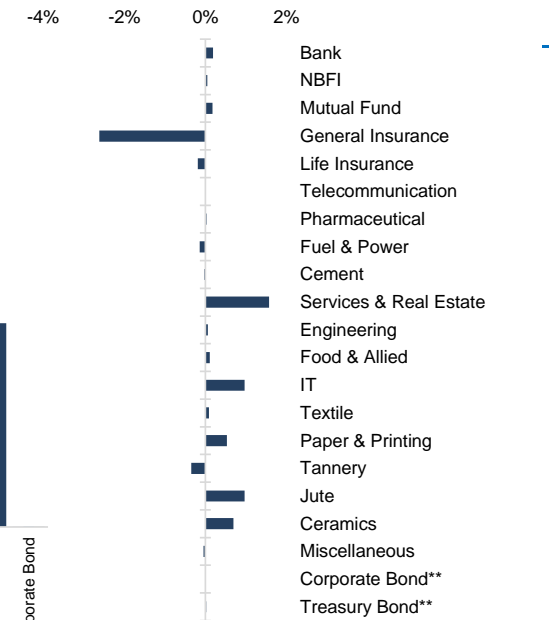


Figure: Sectorial Mcap Change



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	1,448	1,446	+2.78	+0.19%	35	683,224	9.1%	189.1	2.8%	11.9x	0.7x	GP	386,996	8.5%	1.0	13.0x	7.2x
NBFI	1,919	1,918	+0.89	+0.05%	23	186,722	2.5%	17.8	0.3%	NM	4.3x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	830	828	+1.43	+0.17%	37	37,520	0.5%	29.7	0.4%	NM	0.7x	BATBC	280,098	6.2%	1.0	15.3x	6.9x
General Insurance	3,374	3,465	-90.56	-2.61%	42	98,483	1.3%	710.2	10.5%	17.7x	1.6x	SQURPHARMA	185,977	4.1%	3.5	9.9x	1.7x
Life Insurance	2,642	2,647	-5.00	-0.19%	15	73,853	1.0%	548.5	8.1%	NM	NM	ROBI	157,138	3.5%	0.2	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.3	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.2	38.0x	4.6x
Pharmaceutical	3,687	3,686	+0.92	+0.02%	34	715,154	9.5%	493.6	7.3%	19.2x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,701	1,703	-2.40	-0.14%	23	448,622	6.0%	491.7	7.3%	23.5x	1.1x	BEXIMCO	103,571	2.3%	0.4	12.0x	1.2x
Cement	2,477	2,478	-0.56	-0.02%	7	118,971	1.6%	131.8	1.9%	30.3x	2.6x	BERGERPBL	83,118	1.8%	1.5	28.2x	6.9x
Services & Real Estate	2,008	1,977	+31.02	+1.57%	8	79,332	1.1%	457.4	6.8%	28.7x	1.0x	LHBL	76,999	1.7%	56.3	14.2x	3.9x
Engineering	4,509	4,506	+2.81	+0.06%	42	529,217	7.0%	457.2	6.8%	72.5x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,414	21,391	+23.40	+0.11%	21	396,249	5.3%	735.5	10.9%	19.9x	8.2x	BXPHARMA	65,222	1.4%	0.4	14.6x	1.5x
IT	3,249	3,218	+31.17	+0.97%	11	42,364	0.6%	482.2	7.1%	29.6x	3.1x	BRACBANK	57,596	1.3%	0.0	9.0x	0.9x
Textile	1,620	1,619	+1.47	+0.09%	58	170,751	2.3%	610.3	9.0%	77.7x	1.1x	BEACONPHAR	56,595	1.2%	0.3	80.9x	9.2x
Paper & Printing	10,703	10,646	+56.42	+0.53%	6	41,237	0.5%	255.7	3.8%	39.8x	2.1x	ISLAMIBANK	52,969	1.2%	0.0	9.0x	0.8x
Tannery	3,184	3,195	-11.11	-0.35%	6	33,632	0.4%	186.8	2.8%	48.4x	3.3x	DUTCHBANGL	44,203	1.0%	0.1	7.6x	1.0x
Jute	14,627	14,487	+140.23	+0.97%	3	3,578	0.0%	39.5	0.6%	NM	5.8x	TITASGAS	40,459	0.9%	0.2	32.0x	0.6x
Ceramics	695	690	+4.79	+0.69%	5	32,133	0.4%	197.6	2.9%	49.2x	1.9x	UNILEVERCL	39,582	0.9%	0.9	45.0x	13.1x
Miscellaneous	4,196	4,198	-1.95	-0.05%	14	228,462	3.0%	726.0	10.7%	16.4x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,390	0.5%	1.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	+0.02	+0.02%	252	2,986,693	39.7%	0.0	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
LEGACYFOOT	88.2	+10.0%	140.6	NM	9.9x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	BSC	137.6	-0.2%	524.3	9.2x	1.7x
SHYAMPSUG	94.4	+9.9%	9.3	NM	NM	BATBC	74,086	4.3%	15.3x	6.9x	INTRACO	38.9	-4.4%	350.6	25.9x	3.0x
TILIL	21.2	+9.8%	0.0	NM	NM	BEXIMCO	69,196	4.0%	12.0x	1.2x	EHL	104.3	+0.8%	237.1	15.5x	1.3x
MEGHNA PET	32.0	+9.6%	11.2	NM	NM	RENATA	68,042	4.0%	38.0x	4.6x	RUPALILIFE	135.4	+7.0%	209.8	NM	NM
NTC	323.1	+8.8%	0.2	NM	160.0x	BXPHARMA	45,564	2.6%	14.6x	1.5x	ORIONINFU	379.7	+1.3%	207.9	NM	27.6x
CAPMIBLMF	12.6	+8.6%	17.4	NM	1.4x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	MONNOCERA	114.9	+5.7%	194.9	NM	1.4x
GEMINISEA	746.9	+7.5%	185.0	35.6x	29x	GP	38,700	2.2%	13.0x	7.2x	GEMINISEA	746.9	+7.5%	185.0	35.6x	29.4x
RUPALILIFE	135.4	+7.0%	209.8	NM	NM	BRACBANK	30,976	1.8%	9.0x	0.9x	SIMTEX	25.1	+1.2%	168.0	27.6x	1.1x
UNIONCAP	8.3	+6.4%	13.3	NM	NM	LHBL	26,980	1.6%	14.2x	3.9x	LEGACYFOOT	88.2	+10.0%	140.6	NM	9.9x
ZEALBANGLA	143.7	+6.3%	4.9	NM	NM	EBL	24,998	1.5%	6.9x	0.9x	AAMRANET	76.5	+0.3%	128.5	20.0x	2.0x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MERCINS	31.5	-6.3%	5.0	17.9x	1.5x	OLYMPIC	19,683	1.1%	19.4x	3.2x	GP	261.7	261.6	26.0	136	35.63
EASTLAND	25.7	-5.9%	17.6	15.6x	1x	NBL	19,116	1.1%	NM	0.7x	RUPALILIFE	139.0	114.5	14.0	280	34.13
GLOBALINS	39.8	-5.7%	57.4	26.0x	3.0x	PUBALIBANK	18,314	1.1%	4.6x	0.6x	SQURPHARMA	204.5	202.5	35.0	126	25.57
EIL	27.9	-5.4%	8.6	15.6x	1.6x	CITYBANK	18,211	1.1%	5.5x	0.8x	GEMINISEA	740.0	680.0	2.0	31	20.90
UNITEDINS	38.3	-4.7%	1.3	23.1x	1.2x	SEAPEARL	16,847	1.0%	29.4x	11.8x	SONALIPAPR	660.8	569.0	10.0	25	15.41
SONARBAINS	48.8	-4.7%	8.6	24.9x	2.2x	ROBI	15,714	0.9%	85.7x	2.3x	BRACBANK	32.3	32.3	5.0	433	13.98
EASTERNINS	53.1	-4.5%	17.8	15.9x	1.0x	ALARABANK	15,220	0.9%	15.5x	1.1x	EMERALDOIL	86.1	85.6	8.0	145	12.43
BGIC	60.1	-4.5%	7.6	37.6x	3.0x	PRIMEBANK	14,248	0.8%	5.3x	0.6x	DHAKAINS	60.0	60.0	1.0	200	12.00
INTRACO	38.9	-4.4%	350.6	25.9x	3.0x	BSRMLTD	14,210	0.8%	NM	0.7x	LRBDL	34.9	31.6	8.0	332	10.60
TAKAFULINS	43.9	-4.4%	3.5	29.3x	2.3x	UPGDCL	13,547	0.8%	16.7x	4.4x	KDSALTD	75.0	72.0	6.0	122	9.02

\* 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
GP	261.7	261.6	35.6	136	26
RUPALILIFE	139.0	114.5	34.1	280	14
SQURPHARMA	204.5	202.5	25.6	126	35
GEMINISEA	740.0	680.0	20.9	31	2
SONALIPAPR	660.8	569.0	15.4	25	10
BRACBANK	32.3	32.3	14.0	433	5
EMERALDOIL	86.1	85.6	12.4	145	8
DHAKAINS	60.0	60.0	12.0	200	1
LRBDL	34.9	31.6	10.6	332	8
KDSALTD	75.0	72.0	9.0	122	6
SEAPEARL	178.1	178.1	8.9	50	1
BATBC	479.8	479.8	7.3	15	3
PRAGATILIF	122.0	117.9	7.1	58	2
METROSPIN	43.0	42.2	7.0	163	4
POWERGRID	52.4	52.4	6.0	115	1
MARICO	2,350.0	2,330.0	5.5	2	4
PHOENIXFIN	14.7	14.7	5.0	340	10
GIB	8.3	8.2	4.9	596	8
ACFL	23.9	23.9	4.8	199	1
INTRACO	41.3	37.0	4.3	108	3
NBL	8.1	8.1	4.2	524	5
SALVOCHEM	60.0	55.8	3.9	68	3
<b>Total</b>			<b>311.2</b>		<b>223</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
LANKABAFIN		0.0%	10%	Record Date	23-May-23
MIDLANDBNK		0.0%	5%	Record Date	23-May-23
PREMIERBAN		7.5%	13%	Record Date	23-May-23
MERCANBANK		2.0%	10%	Record Date	23-May-23
MTB		10.0%	0%	Record Date	23-May-23
ABBANK		2.0%	0%	Record Date	23-May-23
PEOPLESINS		0.0%	11%	Record Date	24-May-23
UNIONBANK		0.0%	5%	Record Date	24-May-23
MEGHNAINS		0.0%	10%	Record Date	25-May-23
REPUBLIC		0.0%	11%	Record Date	25-May-23
NORTHRNINS		0.0%	10%	Record Date	25-May-23
IFIC		2.5%	3%	Record Date	25-May-23
MARICO		0.0%	750%	Record Date	25-May-23
NRBCBANK		4.5%	8%	Record Date	25-May-23
TRUSTBANK		10.0%	10%	Record Date	29-May-23
NATLIFEINS		0.0%	38%	Record Date	29-May-23
KARNAPHULI		0.0%	10%	Record Date	30-May-23

#### Important DSE News

##### CENTRALINS

Md. Nurul Islam, one of the Sponsor Directors of the Company, has expressed his intention to buy 5,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange Ltd. within next 30 working days.

##### MTB

Associated Builders Corporation Ltd., one of the Sponsors of the Company, has further informed that it has completed its sale of 15,20,000 shares whereas Rashed Ahmed Chowdhury, a Director of the company, has also informed that he has completed his buying of 15,20,000 shares at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 17.05.2023.

##### TAMIJTEX

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Tamijuddin Textile Mills PLC' instead of 'Tamijuddin Textile Mills Limited' with effect from May 23, 2023. Other things (except name) will remain unchanged.

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