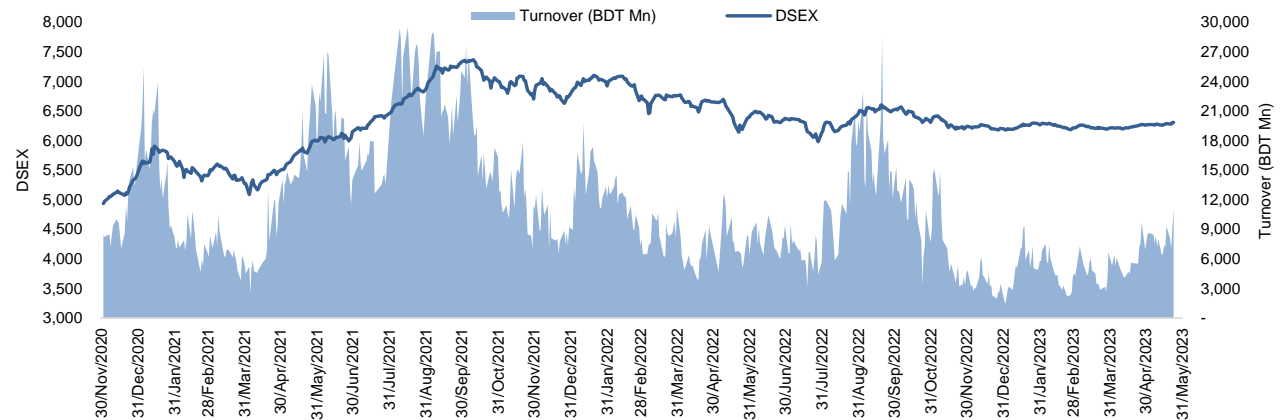


## Daily Market Update

The market closed in red today. The benchmark index DSEX (0.00%) lost 0.29 points and closed at 6,305.90. The blue-chip index DS30 (-0.03%), the Shariah-based index DSES (-0.10%), and the large-cap index CDSET (-0.04%) closed at 2,195.08, 1,369.83, and 1,211.05 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.12% followed by Pharmaceutical (+0.10%), Food & Allied (+0.04%). Bank experienced the highest loss of 0.16% followed by Engineering (-0.08%), NBF (-0.04%). Block trades contributed 11.9% of the overall market turnover. Navana Pharmaceuticals Limited (+10.0%) was the most traded share with a turnover of BDT 372 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,305.90	6,306.19	-0.29	-0.00%	+1.6%
DS30	2,195.08	2,195.81	-0.73	-0.03%	-0.0%
DSES	1,369.83	1,371.16	-1.33	-0.10%	+0.8%
CDSET	1,211.05	1,211.48	-0.43	-0.04%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	74	99	194	367
A Category (Equity)	45	66	135	246
B Category (Equity)	20	30	48	98
N Category (Equity)	3	1	1	5
Z Category (Equity)	6	2	10	18
Mutual Funds	2	0	25	27
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,714,299	7,717,072	-0.0%
	Mn USD	71,462	71,487	-0.0%
Turnover	Mn BDT	11,099	9,203	+20.6%
	Mn USD	103	85	+20.6%
Volume	Mn Shares	233	177	+32.3%
No. of Trade		231,653	194,245	+19.3%

\* Average Interbank Exchange Rate is BDT 107.95 as of May 23, 2023

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Figure: Sectorial Turnover (BDT Mn)

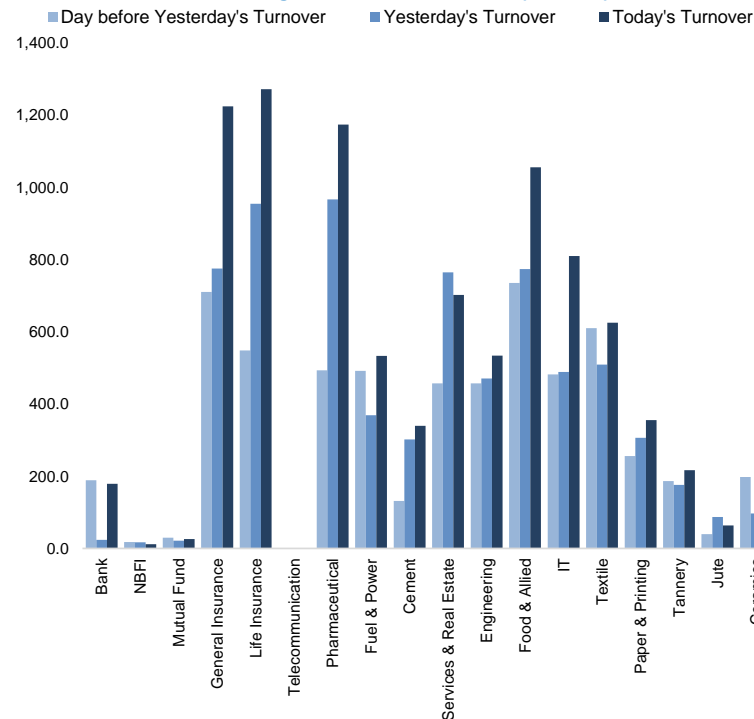
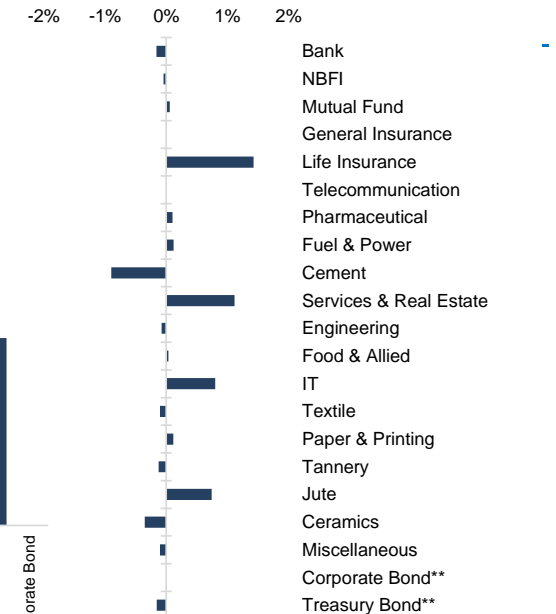


Figure: Sectorial Mcap Change



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	1,447	-2.32	-0.16%	35	681,521	9.0%	179.1	1.8%	11.9x	0.7x	GP	386,996	8.5%	0.5	13.0x	7.2x
NBFI	1,919	1,920	-0.83	-0.04%	23	186,730	2.5%	11.7	0.1%	NM	4.3x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	831	831	+0.49	+0.06%	37	37,580	0.5%	25.7	0.3%	NM	0.7x	BATBC	280,098	6.2%	1.2	15.3x	6.9x
General Insurance	3,432	3,432	+0.37	+0.01%	42	100,165	1.3%	1,224.3	12.5%	18.0x	1.6x	SQURPHARM/	185,977	4.1%	2.0	9.9x	1.7x
Life Insurance	2,753	2,714	+38.79	+1.43%	15	76,957	1.0%	1,271.7	13.0%	NM	NM	ROBI	157,138	3.5%	0.4	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.0	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,701	3,697	+3.80	+0.10%	34	717,946	9.5%	1,173.5	12.0%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,704	1,702	+2.05	+0.12%	23	449,400	6.0%	533.3	5.5%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.7	12.0x	1.2x
Cement	2,524	2,547	-22.81	-0.90%	7	121,223	1.6%	339.2	3.5%	30.8x	2.6x	BERGERPBL	82,585	1.8%	2.2	28.0x	6.9x
Services & Real Estate	2,096	2,073	+23.19	+1.12%	8	82,816	1.1%	702.1	7.2%	30.0x	1.1x	LHBL	78,160	1.7%	174.8	14.4x	3.9x
Engineering	4,506	4,509	-3.45	-0.08%	42	528,842	7.0%	533.7	5.5%	72.5x	1.8x	ICB	74,119	1.6%	0.4	NM	1.7x
Food & Allied	21,463	21,455	+8.12	+0.04%	21	397,148	5.3%	1,055.2	10.8%	19.9x	8.2x	BXPHERMA	65,222	1.4%	0.8	14.6x	1.5x
IT	3,314	3,287	+26.33	+0.80%	11	43,203	0.6%	809.7	8.3%	30.2x	3.1x	BRACBANK	57,596	1.3%	0.0	9.0x	0.9x
Textile	1,621	1,622	-1.67	-0.10%	58	170,816	2.3%	624.9	6.4%	77.7x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,799	10,786	+12.49	+0.12%	6	41,606	0.6%	355.7	3.6%	40.1x	2.1x	ISLAMIBANK	52,486	1.2%	19.2	8.9x	0.8x
Tannery	3,200	3,204	-3.89	-0.12%	6	33,793	0.4%	217.0	2.2%	48.7x	3.3x	DUTCHBANGL	44,203	1.0%	0.1	7.6x	1.0x
Jute	15,645	15,530	+115.24	+0.74%	3	3,827	0.1%	63.9	0.7%	NM	6.2x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	693	696	-2.43	-0.35%	5	32,055	0.4%	139.5	1.4%	49.1x	1.9x	UNILEVERCL	39,256	0.9%	1.1	44.6x	13.0x
Miscellaneous	4,179	4,183	-4.17	-0.10%	14	227,536	3.0%	519.2	5.3%	16.3x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,390	0.5%	1.4	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.1	12.1x	0.9x
Treasury Bond**	93	93	-0.14	-0.15%	252	2,981,847	39.6%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EMERALDOIL	107.8	+10.0%	87.4	NM	NM
PRAGATILIF	131.0	+10.0%	168.2	NM	NM
NAVANAPHAR	97.0	+10.0%	372.2	22.0x	2.4x
MEGHNA PET	38.7	+9.9%	4.9	NM	NM
TILIL	25.6	+9.9%	0.0	NM	NM
MEGCONMILK	35.7	+9.8%	10.7	24.1x	NM
UNITEDINS	42.5	+9.8%	6.6	25.6x	1x
IMAMBUTTON	99.0	+9.8%	24.0	NM	20.6x
NORTHERN	237.4	+8.7%	13.3	NM	2.9x
NTC	382.0	+8.7%	34.1	NM	189.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
OIMEX	25.3	-7.0%	70.1	NM	2.3x
GLOBALINS	39.8	-6.4%	111.0	25.7x	3x
ORIONINFU	369.0	-6.1%	248.2	NM	26.8x
APEXFOODS	424.4	-5.4%	125.8	42.7x	3.4x
MONNOAGML	963.3	-4.0%	49.1	NM	5.5x
GQBALLPEN	98.1	-3.6%	11.0	NM	0.8x
UNIONCAP	8.1	-3.6%	7.8	NM	NM
BANGAS	128.5	-3.5%	17.3	NM	6.1x
PREMIERCEM	56.8	-3.4%	34.3	NM	0.9x
PARAMOUNT	48.7	-3.4%	13.4	27.8x	1.8x

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
BXPHERMA	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%	14.4x	3.9x
EBL	24,998	1.5%	6.9x	0.9x
OLYMPIC	19,683	1.1%	19.1x	3.2x
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
SEAPPEARL	16,847	1.0%	32.4x	13.0x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	15,220	0.9%	15.4x	1.1x
PRIMEBANK	14,248	0.8%	5.3x	0.6x
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	97.0	+10.0%	372.2	22.0x	2.4x
INTRACO	40.5	+6.9%	353.7	26.9x	3.1x
BSC	134.1	-1.3%	305.1	9.0x	1.7x
ORIONINFU	369.0	-6.1%	248.2	NM	26.8x
GENEXIL	90.5	+2.7%	247.1	26.6x	4.7x
GEMINISEA	769.6	-2.1%	242.4	36.7x	30.3x
SONALILIFE	77.7	+5.3%	209.5	NM	NM
CLICL	80.1	+3.5%	207.3	NM	NM
SEAPPEARL	223.8	+4.3%	204.8	32.4x	13.0x
RUPALILIFE	151.5	+6.1%	203.0	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SIBL	12.3	11.8	3.0	42,365	521.06
EMERALDOIL	89.5	88.2	11.0	1,880	167.25
AL-HAJTEX	160.0	155.0	8.0	863	136.07
PRAGATILIF	121.0	113.0	6.0	590	67.92
ISLAMIBANK	35.0	35.0	4.0	1,742	60.96
RUPALILIFE	148.0	129.0	11.0	204	27.52
FUWANGFOOD	23.5	21.2	27.0	1,235	26.43
ISLAMIINS	56.5	56.5	3.0	393	22.19
SONALIPAPR	660.0	569.0	16.0	33	20.38
ORIONPHARM	83.5	71.7	25.0	277	20.29

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SIBL	12.3	11.8	521.1	42,365	3
EMERALDOIL	89.5	88.2	167.2	1,880	11
AL-HAJTEX	160.0	155.0	136.1	863	8
PRAGATILIF	121.0	113.0	67.9	590	6
ISLAMIBANK	35.0	35.0	61.0	1,742	4
RUPALILIFE	148.0	129.0	27.5	204	11
FUWANGFOOD	23.5	21.2	26.4	1,235	27
ISLAMIINS	56.5	56.5	22.2	393	3
SONALIPAPR	660.0	569.0	20.4	33	16
ORIONPHARM	83.5	71.7	20.3	277	25
SQURPHARMA	203.0	191.6	19.5	99	16
GP	261.8	261.6	17.0	65	13
AOL	36.0	32.9	14.6	428	7
UNIONINS	54.0	49.0	12.8	249	11
GEMINISEA	816.0	749.5	12.6	16	3
EGEN	40.7	40.7	11.0	271	18
BXPHERMA	136.4	131.7	9.6	72	10
SEAPPEARL	214.6	199.0	9.1	44	4
SAPORTL	31.8	31.8	8.3	260	1
BERGERPBL	1,778.0	1,778.0	8.1	5	1
EBL	29.7	29.7	8.1	272	1
SALVOCHEM	58.0	55.7	7.5	130	3
<b>Total</b>			<b>1,317.6</b>		<b>339</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
GIB		5.0%	5%	Record Date	30-May-23
EASTERNINS		0.0%	22%	Record Date	30-May-23
ABBANK		2.0%	0%	Record Date	31-May-23
FEDERALINS		0.0%	10%	Record Date	31-May-23
ENVOYTEX		15.0%	0%	Record Date	31-May-23
AGRANINS		7.0%	8%	Record Date	31-May-23
UCB		5.0%	0%	Record Date	31-May-23
ISLAMICFIN		0.0%	5%	Record Date	1-Jun-23

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**Important DSE News**
**GLOBALINS**

The Board of Directors has recommended 12.25% Cash Dividend for the year ended December 31, 2022. Date of AGM: 05.08.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 13.06.2023. The Company has also reported Consolidated EPS of Tk. 1.63, Consolidated NAV per share of Tk. 13.80 and Consolidated NOCFPS of Tk. 4.09 for the year ended December 31, 2022 as against Tk. 1.62, Tk. 13.37 and Tk. 6.79 respectively for the year ended December 31, 2021.

**(Q1 Un-audited):** EPS was Tk. 0.31 for January-March 2023 as against Tk. 0.39 for January-March 2022. NOCFPS was Tk. 0.27 for January-March 2023 as against Tk. 1.35 for January-March 2022. NAV per share was Tk. 14.12 as on March 31, 2023 and Tk. 13.76 as on March 31, 2022.

**SOUTHEASTB**

Refer to their earlier news disseminated by DSE on 02.05.2023 regarding dividend declaration, the Company has further informed that BSEC has accorded its consent for their declaration of 4% Stock Dividend for the year ended December 31, 2022. The record date on June 07, 2023 for entitlement of the aforesaid Stock Dividend will remain unchanged, as previously announced.

**SIBL**

Refer to their earlier news disseminated by DSE on 27.04.2023 regarding dividend declaration, the Company has further informed that BSEC has accorded its consent for their declaration of 5% Stock Dividend for the year ended December 31, 2022. The record date on June 05, 2023 for entitlement of the aforesaid Stock Dividend will remain unchanged, as previously announced.

**ONEBANKLTD**

Refer to their earlier news disseminated by DSE on 02.05.2023 regarding dividend declaration, the Company has further informed that BSEC has accorded its consent for their declaration of 5% Stock Dividend for the year ended December 31, 2022. The record date on June 08, 2023 for entitlement of the aforesaid Stock Dividend will remain unchanged, as previously announced.

**GQBALLPEN**

Refer to their earlier news disseminated by DSE on 05.03.2023 regarding Board Decision to sell of Land for adjusting bank liability, the company has further informed that it has duly transferred the vacant land to the buyers after receiving negotiated entire selling amount of Tk. 3,45,15,000.00 from the buyers. The company has further informed that it has partially adjusted the Southeast bank liability of Tk. 1.15 Crore and the rest amount will be utilized on a priority basis. By selling the vacant land, the company has gained a non-operating income of Tk. 3,03,47,140.00 which will be reflected in the accounts.

**RINGSHINE**

The company has informed that the Board of Directors has appointed Brigadier General A.H.M. Mokbul Hossain, ndc, psc (retd) as Managing Director of the company with effect from May 24, 2023.