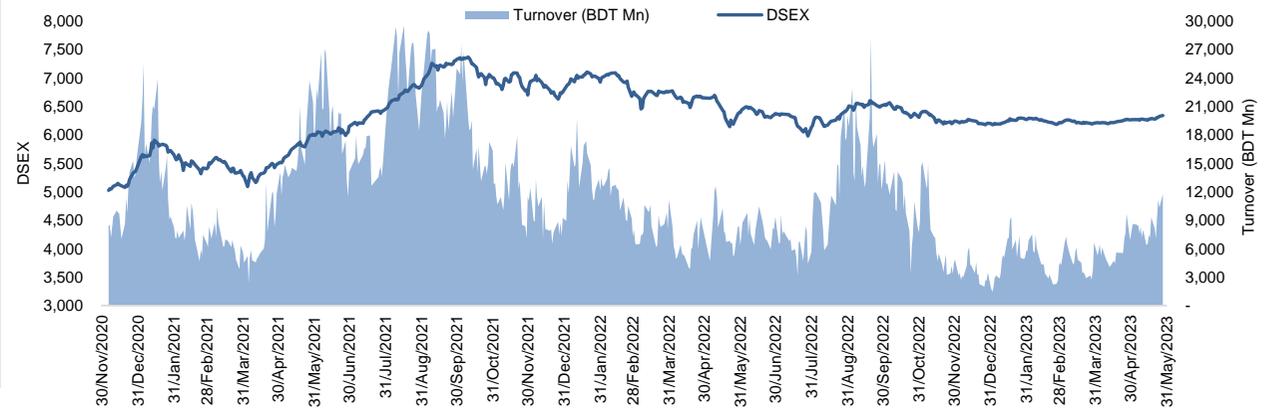


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.22%) gained 14.15 points and closed at 6,339.88. The blue-chip index DS30 (+0.05%), the Shariah-based index DSES (+0.02%), and the large-cap index CDSET (+0.11%) closed at 2,199.70, 1,371.06, and 1,212.70 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.06% followed by Fuel & Power (-0.05%), Food & Allied (-0.01%), Pharmaceutical (-0.01%), Engineering (0.00%), Telecommunication (0.00%), and NBF1 (+0.14%), respectively. Block trades contributed 4.7% of the overall market turnover. Anwar Galvanizing Ltd. (+0.6%) was the most traded share with a turnover of BDT 723 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,339.88	6,325.73	+14.15	+0.22%	+2.1%
DS30	2,199.70	2,198.50	+1.19	+0.05%	+0.2%
DSES	1,371.06	1,370.78	+0.28	+0.02%	+0.9%
CDSET	1,212.70	1,211.38	+1.32	+0.11%	-0.1%

	Advanced	Declined	Unchanged	Total
All Category	102	77	186	365
A Category (Equity)	74	39	133	246
B Category (Equity)	20	32	45	97
N Category (Equity)	2	3	0	5
Z Category (Equity)	6	3	8	17
Mutual Funds	3	1	23	27
Corporate Bonds	0	0	1	1
Treasury Bonds	1	0	0	1

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,732,977	7,725,600	
	Mn USD	71,661	71,593	+0.1%
Turnover	Mn BDT	11,746	10,366	+13.3%
	Mn USD	109	96	
Volume	Mn Shares	224	204	+9.9%
	No. of Trade	256,357	228,460	+12.2%

* Average Interbank Exchange Rate is BDT 107.91 as of May 25, 2023

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Figure: Sectorial Turnover (BDT Mn)

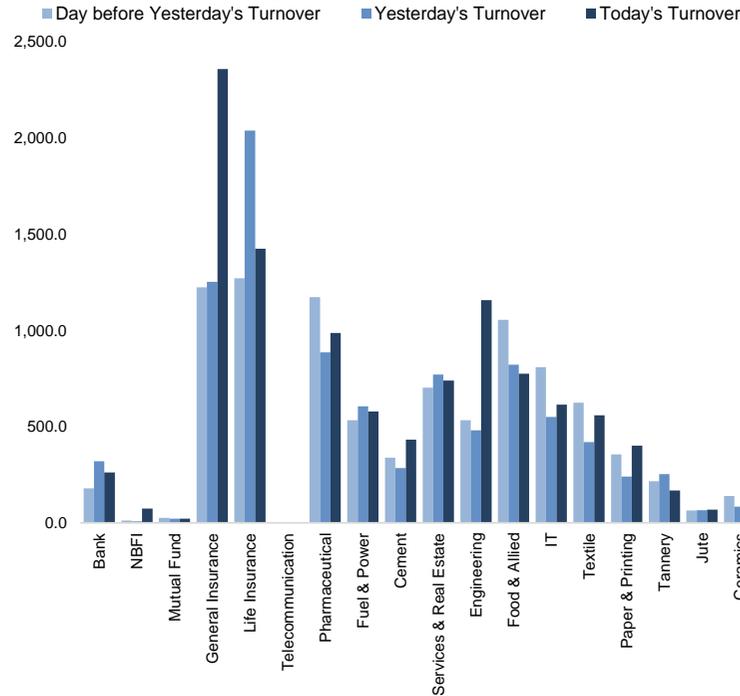
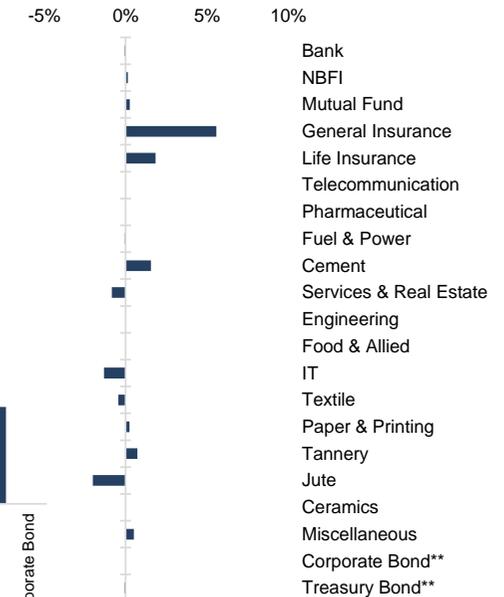


Figure: Sectorial Mcap Change



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	1,447	1,447	-0.82	-0.06%	35	682,443	9.0%	262.6	2.3%	11.9x	0.7x	GP	386,996	8.5%	0.5	13.0x	7.2x
NBFI	1,921	1,919	+2.75	+0.14%	23	186,970	2.5%	74.3	0.7%	NM	4.3x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	832	830	+2.13	+0.26%	37	37,625	0.5%	21.6	0.2%	NM	0.7x	BATBC	280,098	6.1%	1.8	15.3x	6.9x
General Insurance	3,764	3,565	+198.97	+5.58%	42	109,859	1.5%	2,359.4	21.1%	19.8x	1.7x	SQURPHARMA	185,977	4.1%	3.3	9.9x	1.7x
Life Insurance	2,933	2,880	+52.92	+1.84%	15	81,974	1.1%	1,424.6	12.7%	NM	NM	ROBI	157,138	3.4%	0.1	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.6	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,702	3,703	-0.21	-0.01%	34	718,211	9.5%	987.1	8.8%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.2	16.7x	4.4x
Fuel & Power	1,704	1,705	-0.81	-0.05%	23	449,414	6.0%	578.7	5.2%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.5	12.0x	1.2x
Cement	2,563	2,523	+39.52	+1.57%	7	123,085	1.6%	432.7	3.9%	31.3x	2.7x	BERGERPBL	83,800	1.8%	3.1	28.4x	7.0x
Services & Real Esta	2,125	2,143	-17.98	-0.84%	8	83,940	1.1%	739.8	6.6%	30.4x	1.1x	LHBL	80,019	1.8%	308.1	14.8x	4.0x
Engineering	4,507	4,508	-0.13	-0.00%	42	529,027	7.0%	1,157.8	10.3%	72.5x	1.8x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,471	21,473	-2.96	-0.01%	21	397,287	5.3%	775.4	6.9%	19.9x	8.2x	BXPHARMA	65,222	1.4%	0.8	14.6x	1.5x
IT	3,233	3,276	-43.38	-1.32%	11	42,149	0.6%	614.1	5.5%	29.5x	3.0x	BRACBANK	57,596	1.3%	0.4	9.0x	0.9x
Textile	1,608	1,615	-7.22	-0.45%	58	169,472	2.2%	558.5	5.0%	77.1x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	10,818	10,792	+25.79	+0.24%	6	41,682	0.6%	401.7	3.6%	40.2x	2.1x	ISLAMIBANK	52,486	1.2%	0.4	8.9x	0.8x
Tannery	3,255	3,232	+23.35	+0.72%	6	34,381	0.5%	168.3	1.5%	49.5x	3.4x	DUTCHBANGL	44,203	1.0%	0.2	7.6x	1.0x
Jute	15,590	15,910	-319.40	-2.01%	3	3,814	0.1%	68.0	0.6%	NM	6.1x	TITASGAS	40,459	0.9%	0.1	32.0x	0.6x
Ceramics	691	691	+0.22	+0.03%	5	31,951	0.4%	58.0	0.5%	48.9x	1.9x	UNILEVERCL	39,083	0.9%	2.2	44.4x	13.0x
Miscellaneous	4,199	4,178	+21.51	+0.51%	14	228,649	3.0%	503.4	4.5%	16.3x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,390	0.5%	0.7	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.1	12.1x	0.9x
Treasury Bond**	93	93	-0.05	-0.05%	252	2,980,227	39.5%	1.5	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
PARAMOUNT	54.0	+10.0%	73.6	30.9x	2.0x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	ANWARGALV	214.6	+0.6%	723.2	42.9x	8.6x
MEGHNA PET	40.8	+10.0%	10.0	NM	NM	BATBC	74,086	4.3%	15.3x	6.9x	NAVANAPHAR	101.9	+1.0%	350.3	23.1x	2.5x
TILIL	30.9	+10.0%	0.0	NM	NM	BEXIMCO	69,196	4.0%	12.0x	1.2x	INTRACO	40.9	+1.7%	339.9	27.2x	3.2x
LEGACYFOOT	110.5	+10.0%	91.6	NM	12.4x	RENATA	68,042	4.0%	38.0x	4.6x	LHBL	68.9	+2.7%	308.1	14.8x	4.0x
GREENDELTA	76.5	+9.9%	144.6	12.2x	1.1x	BXPHARMA	45,564	2.6%	14.6x	1.5x	SEAPEARL	235.3	-2.0%	288.8	34.1x	13.6x
MEGCONMILK	37.7	+9.9%	14.8	25.5x	NM	BEACONPHAR	39,617	2.3%	80.9x	9.2x	BSC	131.7	-1.7%	239.0	8.4x	1.6x
DHAKAINS	68.9	+9.9%	134.5	21.1x	2x	GP	38,700	2.2%	13.0x	7.2x	PROVATIINS	62.0	+5.3%	236.8	30.1x	3.0x
UNIONCAP	8.9	+9.9%	27.3	NM	NM	BRACBANK	30,976	1.8%	9.0x	0.9x	JHRML	81.9	+2.6%	191.1	35.4x	2.6x
FEDERALINS	31.2	+9.9%	49.2	29.4x	2.3x	LHBL	26,980	1.6%	14.8x	4.0x	RUPALILIFE	172.7	+4.5%	189.1	NM	NM
MEGHNAINS	49.2	+9.8%	140.5	31.9x	3.2x	EBL	24,998	1.5%	6.9x	0.9x	MEGHNALIFE	90.8	+4.5%	185.9	NM	NM
						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						
						SEAPEARL	16,847	1.0%	34.1x	13.6x						
						ROBI	15,714	0.9%	85.7x	2.3x						
						ALARABANK	15,220	0.9%	15.8x	1.1x						
						PRIMEBANK	14,248	0.8%	5.4x	0.6x						
						BSRMLTD	14,210	0.8%	NM	0.7x						
						UPGDCL	13,547	0.8%	16.7x	4.4x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
SHURWID	19.9	-7.9%	89.6	NM	1.5x	RUPALILIFE	165.0	149.8	19.0	617	93.51					
JUTESPINN	414.2	-7.1%	7.4	NM	NM	EMERALDOIL	101.5	99.5	6.0	724	72.60					
YPL	19.8	-7.0%	54.5	NM	3.7x	LHBL	73.8	67.1	2.0	545	36.90					
MONOSPOOL	292.8	-5.4%	55.9	38.8x	6.0x	BDFINANCE	44.1	44.1	1.0	680	29.99					
TAMIJTEX	192.2	-5.3%	51.7	28.3x	2.2x	LRBDL	31.6	31.6	32.0	673	21.26					
APEXFOODS	403.1	-5.0%	86.8	40.6x	3.2x	ISLAMIINS	52.9	52.8	2.0	400	21.14					
SIMTEX	21.0	-4.5%	32.5	23.1x	0.9x	BEXIMCO	117.0	104.5	5.0	160	17.93					
METROSPIN	40.8	-4.4%	22.2	41.7x	1.9x	SQURPHARMA	209.8	202.3	20.0	76	15.44					
PAPERPROC	246.7	-4.2%	129.7	50.0x	7.3x	BSC	132.0	132.0	1.0	111	14.59					
RAHIMAFODD	271.0	-3.9%	89.5	NM	26.0x	SONALIPAPR	659.0	570.0	9.0	20	12.38					

* 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
RUPALILIFE	165.0	149.8	93.5	617	19
EMERALDOIL	101.5	99.5	72.6	724	6
LHBL	73.8	67.1	36.9	545	2
BDFINANCE	44.1	44.1	30.0	680	1
LRBDL	31.6	31.6	21.3	673	32
ISLAMIINS	52.9	52.8	21.1	400	2
BEXIMCO	117.0	104.5	17.9	160	5
SQURPHARMA	209.8	202.3	15.4	76	20
BSC	132.0	132.0	14.6	111	1
SONALIPAPR	659.0	570.0	12.4	20	9
BANKASIA	20.2	20.2	12.2	604	3
ORIONPHARM	73.5	71.8	12.2	168	17
APEXTANRY	114.0	114.0	11.7	102	1
ANWARGALV	210.0	194.7	10.9	53	10
SEAPEARL	251.5	222.0	8.2	35	3
AAMRANET	80.0	80.0	8.0	100	1
NBL	8.1	8.1	7.3	900	8
PRAGATILIF	129.0	127.1	7.2	56	2
CONFIDCEM	87.8	80.3	6.9	84	6
NPOLYMER	48.5	46.5	6.8	145	13
MTB	15.5	15.5	6.7	435	1
AGRANINS	45.0	45.0	6.7	148	1
Total			555.9		297

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
SIBL		5.0%	5%	Record Date	5-Jun-23
STANDBANKL		2.5%	3%	Record Date	5-Jun-23
RUPALIINS		0.0%	10%	Record Date	6-Jun-23
SOUTHEASTB		4.0%	6%	Record Date	7-Jun-23
ONEBANKLTD		5.0%	0%	Record Date	8-Jun-23
NCCBANK		5.0%	5%	Record Date	8-Jun-23

Important DSE News
ACTIVEFINE

(Q3 Un-audited): EPS was Tk. 0.02 for January-March 2023 as against Tk. 0.04 for January-March 2022; EPS was Tk. 0.12 for July 2022-March 2023 as against Tk. 0.24 for July 2021-March 2022. NOCFPS was Tk. 0.08 for July 2022-March 2023 as against Tk. 1.22 for July 2021-March 2022. NAV per share was Tk. 22.17 as on March 31, 2023 and Tk. 22.07 as on June 30, 2022.

IBP

(Q3 Un-audited): EPS was Tk. 0.01 for January-March 2023 as against Tk. 0.12 for January-March 2022; EPS was Tk. 0.10 for July 2022-March 2023 as against Tk. 0.62 for July 2021-March 2022. NOCFPS was Tk. 0.06 for July 2022-March 2023 as against Tk. 0.55 for July 2021-March 2022. NAV per share was Tk. 13.99 as on March 31, 2023 and Tk. 13.98 as on June 30, 2022.

AOL

(Q3 Un-audited): EPS was Tk. 0.52 for January-March 2023 as against Tk. 0.46 for January-March 2022; EPS was Tk. 1.26 for July 2022-March 2023 as against Tk. 1.34 for July 2021-March 2022. NOCFPS was Tk. 1.92 for July 2022-March 2023 as against Tk. 2.73 for July 2021-March 2022. NAV per share was Tk. 19.00 as on March 31, 2023 and Tk. 18.56 as on June 30, 2022.

AFCAGRO

(Q3 Un-audited): EPS was Tk. 0.01 for January-March 2023 as against Tk. 0.05 for January-March 2022; EPS was Tk. 0.17 for July 2022-March 2023 as against Tk. 0.39 for July 2021-March 2022. NOCFPS was Tk. 0.36 for July 2022-March 2023 as against Tk. (0.90) for July 2021-March 2022. NAV per share was Tk. 18.33 as on March 31, 2023 and Tk. 19.96 as on June 30, 2022.

ONEBANKLTD

The company has informed that the Board of Directors has accorded its approval for issuance of 5th Subordinated Bond (at Floating Rate) for Tk. 500,00,00,000.00 (Taka five hundred crore only) as a process of inclusion in Tier-II capital as "Subordinated Bond", for a period of 7 (seven) years through private placement subject to the approval of the Regulatory Authorities and compliance of all formalities in this respect.

UNITEDFIN

The Company will be placed in 'B' category from existing 'A' category with effect from May 29, 2023 as the Company has approved 5% cash dividend for the year ended December 31, 2022.

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