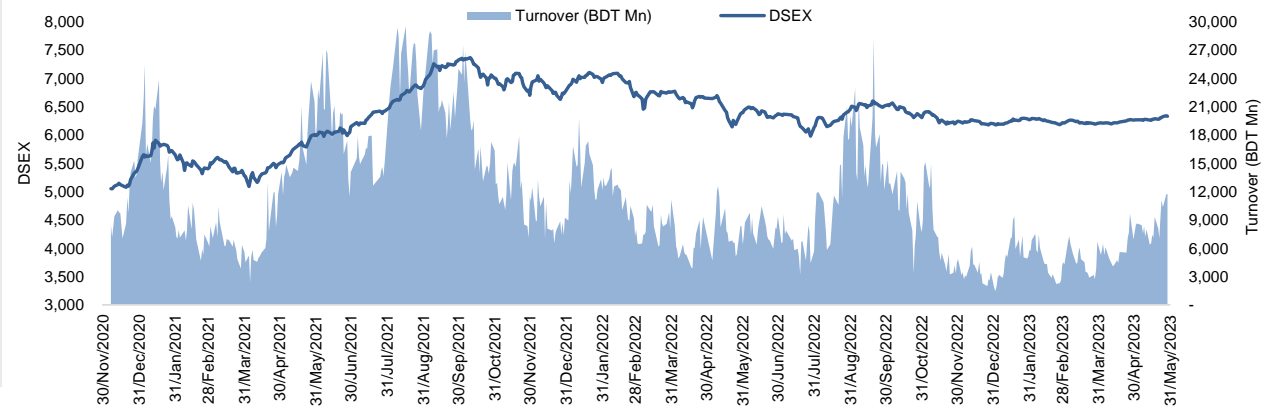


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.11%) lost 7.14 points and closed at 6,332.74. The blue-chip index DS30 (-0.05%), the Shariah-based index DSES (-0.10%), and the large-cap index CDSET (-0.01%) closed at 2,198.61, 1,369.71, and 1,212.62 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 0.29% followed by Fuel & Power (+0.06%), Telecommunication (0.00%). Pharmaceutical experienced the highest loss of 0.14% followed by Bank (-0.10%), Engineering (-0.07%), Food & Allied (-0.03%). Block trades contributed 22.1% of the overall market turnover. Intraco Refueling Station Limited (+3.9%) was the most traded share with a turnover of BDT 360 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,332.74	6,339.88	-7.14	-0.11%	+2.0%
DS30	2,198.61	2,199.70	-1.09	-0.05%	+0.2%
DSES	1,369.71	1,371.06	-1.35	-0.10%	+0.8%
CDSET	1,212.62	1,212.70	-0.08	-0.01%	-0.1%

	Advanced	Declined	Unchanged	Total
All Category	72	112	197	381
A Category (Equity)	47	75	131	253
B Category (Equity)	20	30	54	104
N Category (Equity)	1	3	1	5
Z Category (Equity)	4	4	11	19
Mutual Funds	9	0	25	34
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,730,168	7,732,977	-0.0%
	Mn USD	71,246	71,272	-0.0%
Turnover	Mn BDT	11,746	11,746	-0.0%
	Mn USD	108	108	-0.0%
Volume	Mn Shares	240	224	+7.0%
	No. of Trade	224,964	256,357	-12.2%

\* Average Interbank Exchange Rate is BDT 108.50 as of May 28, 2023

**Fahim Hassan**  
 Research Analyst

(880) 1709636546  
 fahim.hassan@bracepl.com

**Md. Tanvir Ahmed**  
 Research Associate

(880) 1708805201  
 mtanvir.ahmed@bracepl.com

Figure: Sectorial Turnover (BDT Mn)

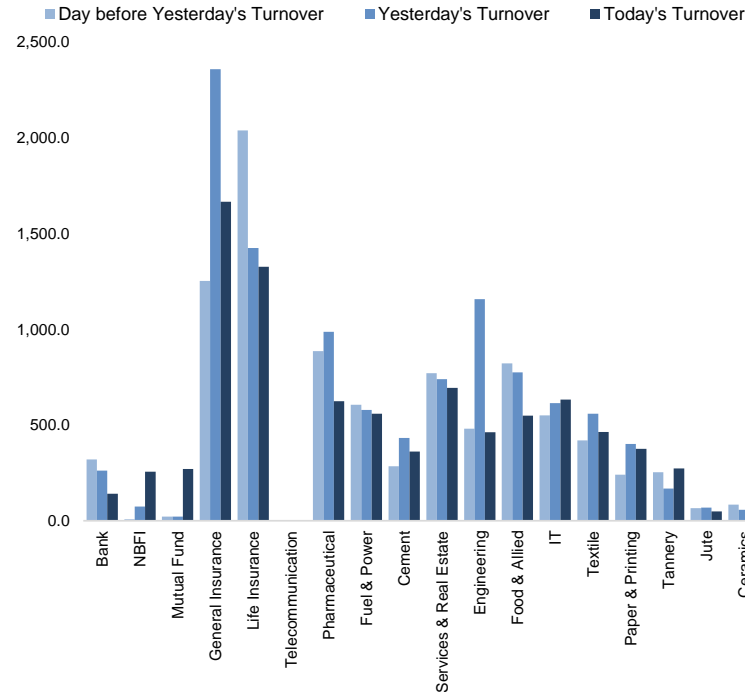
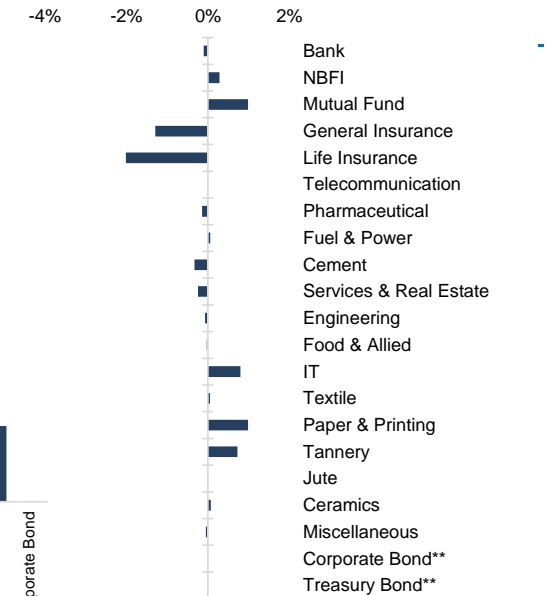


Figure: Sectorial Mcap Change



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	1,446	1,448	-1.49	-0.10%	35	681,740	9.0%	141.3	1.5%	11.9x	0.7x	GP	386,996	8.5%	0.7	13.0x	7.2x
NBFI	1,927	1,921	+5.49	+0.29%	23	187,504	2.5%	256.4	2.8%	NM	4.3x	WALTONHIL	317,378	7.0%	0.1	49.1x	3.2x
Mutual Fund	840	832	+8.22	+0.99%	37	37,996	0.5%	271.0	3.0%	NM	0.7x	BATBC	280,098	6.1%	1.8	15.3x	6.9x
General Insurance	3,715	3,764	-48.61	-1.29%	42	108,441	1.4%	1,667.1	18.2%	19.6x	1.7x	SQURPHARM	185,977	4.1%	2.8	9.9x	1.7x
Life Insurance	2,874	2,933	-59.02	-2.01%	15	80,325	1.1%	1,326.2	14.5%	NM	NM	ROBI	157,138	3.4%	0.3	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%	0.6	38.0x	4.6x
Pharmaceutical	3,697	3,702	-5.19	-0.14%	34	717,205	9.5%	624.0	6.8%	19.3x	2.3x	UPGDCL	135,475	3.0%	0.1	16.7x	4.4x
Fuel & Power	1,705	1,704	+0.94	+0.06%	23	449,662	6.0%	559.6	6.1%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.2	12.0x	1.2x
Cement	2,554	2,563	-8.35	-0.33%	7	122,684	1.6%	362.0	4.0%	31.2x	2.7x	BERGERPBL	83,837	1.8%	4.3	28.4x	7.0x
Services & Real Esta	2,119	2,125	-5.17	-0.24%	8	83,736	1.1%	694.6	7.6%	30.3x	1.1x	LHBL	80,367	1.8%	262.3	14.8x	4.0x
Engineering	4,504	4,507	-3.21	-0.07%	42	528,650	7.0%	462.0	5.1%	72.4x	1.8x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,464	21,471	-6.68	-0.03%	21	397,163	5.3%	548.8	6.0%	19.9x	8.2x	BXPHARMA	65,222	1.4%	0.3	14.6x	1.5x
IT	3,259	3,233	+25.89	+0.80%	11	42,486	0.6%	633.3	6.9%	29.7x	3.1x	BRACBANK	57,596	1.3%	0.1	9.0x	0.9x
Textile	1,609	1,608	+0.87	+0.05%	58	169,564	2.2%	463.3	5.1%	77.2x	1.1x	BEACONPHAR	56,595	1.2%	0.4	80.9x	9.2x
Paper & Printing	10,925	10,818	+106.44	+0.98%	6	42,092	0.6%	376.1	4.1%	40.6x	2.1x	ISLAMIBANK	52,486	1.2%	0.1	8.9x	0.8x
Tannery	3,279	3,255	+23.61	+0.73%	6	34,630	0.5%	272.8	3.0%	49.9x	3.4x	DUTCHBANGL	44,203	1.0%	0.2	7.6x	1.0x
Jute	15,591	15,590	+1.15	+0.01%	3	3,814	0.1%	48.3	0.5%	NM	6.1x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	691	691	+0.50	+0.07%	5	31,974	0.4%	43.3	0.5%	49.0x	1.9x	UNILEVERCL	39,092	0.9%	1.8	44.4x	13.0x
Miscellaneous	4,197	4,199	-2.13	-0.05%	14	228,533	3.0%	395.3	4.3%	16.3x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-	-	9	36,390	0.5%	1.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.6	12.1x	0.9x
Treasury Bond**	93	93	-	-	252	2,980,227	39.5%	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
PARAMOUNT	59.4	+10.0%	104.0	33.9x	2.2x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	INTRACO	42.5	+3.9%	360.1	28.2x	3.3x
MEGHNAINS	54.1	+10.0%	122.4	35.1x	3.5x	BATBC	74,086	4.3%	15.3x	6.9x	BPML	83.0	+2.7%	269.0	22.5x	1.1x
CAPMIBBLMF	15.5	+9.9%	14.0	NM	1.7x	BEXIMCO	69,196	4.0%	12.0x	1.2x	LHBL	69.2	+0.4%	262.3	14.8x	4.0x
MIDASFIN	12.2	+9.9%	12.4	9.2x	1.3x	RENATA	68,042	4.0%	38.0x	4.6x	SEAPEARL	227.7	-3.2%	231.3	33.0x	13.2x
TILIL	33.9	+9.7%	0.0	NM	NM	BXPHARMA	45,564	2.6%	14.6x	1.5x	UNIQUEHRL	77.6	+2.8%	227.5	13.6x	0.9x
1STPRIMFMF	16.2	+9.5%	19.5	NM	1.5x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	MEGHNALIFE	85.5	-5.8%	216.9	NM	NM
CAPMBDBLMF	10.8	+9.1%	55.1	NM	1x	GP	38,700	2.2%	13.0x	7.2x	RUPALILIFE	170.5	-1.3%	216.5	NM	NM
NTC	491.2	+8.7%	8.1	NM	243.2x	BRACBANK	30,976	1.8%	9.0x	0.9x	NAVANAPHAR	97.6	-4.2%	212.8	22.2x	2.4x
AIL	59.1	+7.1%	125.3	36.9x	2.6x	LHBL	26,980	1.6%	14.8x	4.0x	AAMRANET	79.2	+3.1%	202.9	20.7x	2.1x
DESHBANDHU	20.0	+7.0%	43.3	57.1x	1.1x	EBL	24,998	1.5%	6.9x	0.9x	SUNLIFEINS	62.7	+3.8%	189.0	NM	NM
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	OLYMPIC	19,683	1.1%	18.9x	3.1x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
OIMEX	23.3	-7.2%	32.7	NM	2.1x	NBL	19,116	1.1%	NM	0.7x	BEXIMCO	115.1	104.1	10.0	9,696	1,037.70
MIDLANDBNK	14.4	-7.1%	68.2	14.9x	1x	PUBALIBANK	18,314	1.1%	4.6x	0.6x	BEXGSUKUK	85.5	85.5	6.0	11,349	970.34
RENWICKJA	814.4	-6.8%	2.6	NM	NM	CITYBANK	18,211	1.1%	5.5x	0.8x	SQURPHARMA	204.0	202.4	29.0	571	116.39
BGIC	59.2	-6.0%	7.3	37.0x	3.0x	SEAPEARL	16,847	1.0%	33.0x	13.2x	BXPHARMA	136.0	133.0	7.0	425	56.90
SHURWID	18.7	-6.0%	53.0	NM	1.5x	ROBI	15,714	0.9%	85.7x	2.3x	SUMITPOWER	34.0	30.6	2.0	931	31.55
MEGHNALIFE	85.5	-5.8%	216.9	NM	NM	ALARABANK	15,220	0.9%	15.8x	1.1x	GP	264.8	261.6	36.0	106	27.78
PADMALIFE	46.3	-5.7%	52.1	NM	NM	PRIMEBANK	14,248	0.8%	5.4x	0.6x	LRBDL	38.6	31.6	26.0	791	26.57
PRIMELIFE	68.9	-5.6%	34.3	NM	NM	BSRMLTD	14,210	0.8%	NM	0.7x	BATBC	480.6	479.8	25.0	53	25.31
MEGCONMILK	35.6	-5.6%	6.3	24.1x	NM	UPGDCL	13,547	0.8%	16.7x	4.4x	LHBL	67.1	67.1	1.0	350	23.49
PRAGATILIF	125.9	-5.2%	78.4	NM	NM						RUPALILIFE	189.0	156.0	6.0	134	21.57

\* 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
BEXIMCO	115.1	104.1	1,037.7	9,696	10
BEXGSUKUK	85.5	85.5	970.3	11,349	6
SQURPHARMA	204.0	202.4	116.4	571	29
BXPHARMA	136.0	133.0	56.9	425	7
SUMITPOWER	34.0	30.6	31.5	931	2
GP	264.8	261.6	27.8	106	36
LRBDL	38.6	31.6	26.6	791	26
BATBC	480.6	479.8	25.3	53	25
LHBL	67.1	67.1	23.5	350	1
RUPALIFE	189.0	156.0	21.6	134	6
OLYMPIC	168.0	158.0	16.6	105	2
CITYBANK	21.4	21.4	15.2	710	1
SALVOCHEM	61.8	57.1	13.4	219	5
AOL	37.0	32.9	11.7	332	12
MARICO	2,360.0	2,350.0	11.7	5	10
AAMRANET	78.5	77.0	10.9	140	8
APEXFOOT	305.9	305.9	10.7	35	1
BRACBANK	32.3	32.3	10.2	315	3
ORIONPHARM	85.6	71.8	9.6	130	17
BANKASIA	20.2	20.2	8.9	440	1
BERGERPBL	1,812.0	1,812.0	8.2	5	1
KDSALTD	80.5	70.0	6.9	96	8
<b>Total</b>			<b>2,598.0</b>		<b>362</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
AB BANK		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		0.0%	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
RUPALIBANK		0.0%	0%	Record Date	11-Jun-23
ALARABANK		3.0%	12%	Record Date	12-Jun-23

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#### Important DSE News

##### AGRANINS

Refer to their earlier news disseminated by DSE on 11.05.2023 regarding dividend declaration, the company has further informed that they have not received consent yet from BSEC against their declaration of 7% Stock dividend for the year ended December 31, 2022. Therefore, the record date as on 31.05.2023 will only be applicable for entitlement of 8% Cash dividend.

##### MERCANBANK

Md. Mizanur Rahman Chowdhury, one of the Sponsors of the company, has expressed his intention to sell 40,000 shares out of his holdings 65,00,000 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange Ltd. within next 30 working days.

##### PHENIXINS

The Company has informed that Deen Mohammad who was a director of the company passed away on 27.04.2021. His total holding of 11,67,859 shares of the company will be transmitted according to the Succession Certificate issued by the Honorable Court. As per the succession certificate, Mst. Rokshana Begum (wife) will receive 1,45,982 shares, Meherun Haque (daughter) will receive 2,55,469 shares, Evana Fahmida Mohammad (daughter) will receive 2,55,469 shares and Mohammed Shoeb (son) will receive 5,10,939 shares. The Court also ordered to transfer all shares to Mohammed Shoeb on behalf of the successors. As such, Mohammed Shoeb, one of the Directors of the Company, will receive 11,67,859 shares from his father Late Deen Mohammad.

##### PHOENIXFIN

The Company has informed that Deen Mohammad who was a sponsor and Chairman of the company passed away on 27.04.2021. His total holding of 52,24,253 shares of the company will be transmitted according to the Succession Certificate issued by the Honorable Court. As per the succession certificate, Mst. Rokshana Begum (wife) will receive 6,53,032 shares, Meherun Haque (daughter) will receive 11,42,805 shares, Evana Fahmida Mohammad (daughter) will receive 11,42,805 shares and Mohammed Shoeb (son) will receive 22,85,611 shares. The Court also ordered to transfer all shares to Mohammed Shoeb on behalf of the successors. As such, Mohammed Shoeb, one of the Sponsors of the Company, will receive 52,24,253 shares from his father Late Deen Mohammad.

##### MTB

Syed Manzur Elahi, one of the Sponsor Directors of the Company, has further informed that he has completed his buying of 6,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 16.05.2023.

##### NCCBANK

Minhaz Kamal Khan, one of the Sponsors of the Company, has further informed that he has completed his sale of 20,000 shares of the Company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 09.05.2023.

##### INTECH

The company has informed that the Board of Directors has accepted the resignation of existing Chairman Barrister Mr. Khandaker Reza-E-Raquib and appointed Mr. Atiqul Alam Chowdhury as the new Chairman of the company. The Company has further informed that, Barrister Mr. Khandaker Reza-E-Raquib will continue as the Director of the company.

##### PRIMELIFE

The Company will be placed in 'B' category from existing 'A' category with effect from May 30, 2023 as the Company has approved 2% cash dividend for the year ended December 31, 2021.