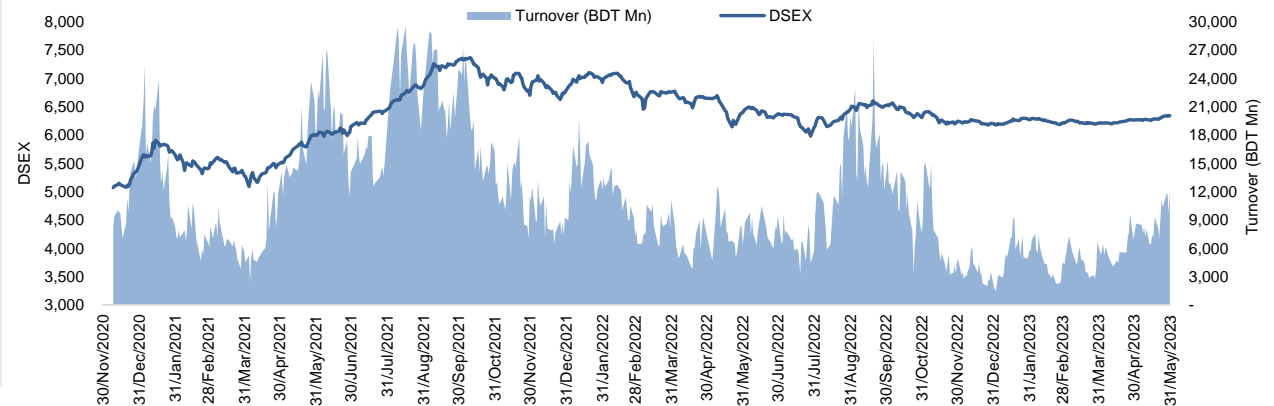


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.10%) lost 6.05 points and closed at 6,339.74. The blue-chip index DS30 (-0.21%), the Shariah-based index DSES (+0.10%), and the large-cap index CDSET (-0.07%) closed at 2,198.02, 1,377.00, and 1,214.02 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 0.07% followed by Food & Allied (+0.06%), Telecommunication (0.00%). Bank experienced the highest loss of 0.11% followed by Fuel & Power (-0.10%), Engineering (-0.06%), Pharmaceutical (-0.04%). Block trades contributed 4.1% of the overall market turnover. Bashundhara Paper Mills Limited (+3.7%) was the most traded share with a turnover of BDT 505 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,339.74	6,345.78	-6.05	-0.10%	+2.1%
DS30	2,198.02	2,202.70	-4.68	-0.21%	+0.1%
DSES	1,377.00	1,375.65	+1.35	+0.10%	+1.3%
CDSET	1,214.02	1,214.92	-0.90	-0.07%	-0.0%

	Advanced	Declined	Unchanged	Total
All Category	64	114	184	362
A Category (Equity)	36	81	125	242
B Category (Equity)	24	24	49	97
N Category (Equity)	1	3	1	5
Z Category (Equity)	3	6	9	18
Mutual Funds	1	8	23	32
Corporate Bonds	0	0	3	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,737,190	7,739,282	-0.0%
	Mn USD	71,311	71,330	
Turnover	Mn BDT	11,987	9,760	+22.8%
	Mn USD	110	90	
Volume	Mn Shares	208	190	+9.3%
No. of Trade		248,668	215,410	+15.4%

\* Average Interbank Exchange Rate is BDT 108.50 as of May 30, 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)

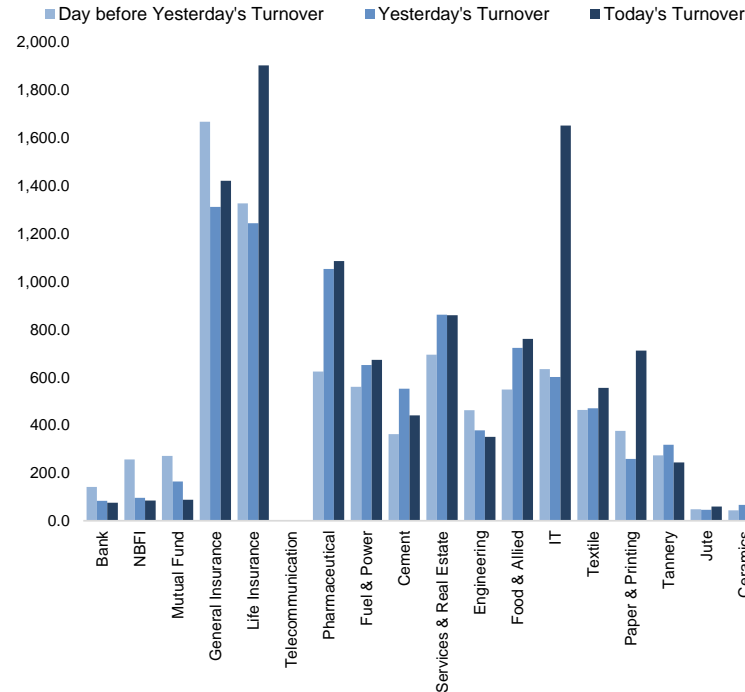
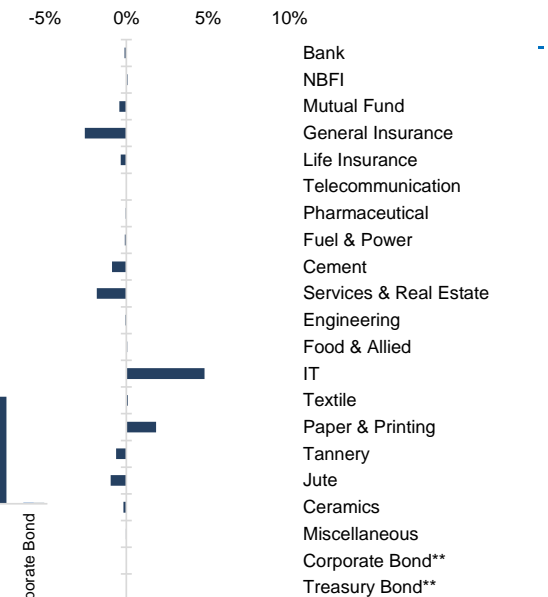


Figure: Sectorial Mcap Change



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	1,444	1,446	-1.56	-0.11%	35	680,681	9.0%	75.1	0.7%	11.8x	0.7x	GP	386,996	8.5%	0.7	13.0x	7.2x
NBFI	1,924	1,923	+1.42	+0.07%	23	187,250	2.5%	84.8	0.7%	NM	4.3x	WALTONHIL	317,378	7.0%	0.0	49.1x	3.2x
Mutual Fund	835	839	-3.63	-0.43%	37	37,758	0.5%	87.5	0.8%	NM	0.7x	BATBC	280,098	6.1%	0.5	15.3x	6.9x
General Insurance	3,543	3,636	-92.22	-2.54%	42	103,419	1.4%	1,421.4	12.4%	18.7x	1.6x	SQURPHARM	185,977	4.1%	1.6	9.9x	1.7x
Life Insurance	2,912	2,922	-10.15	-0.35%	15	81,399	1.1%	1,903.0	16.6%	NM	NM	ROBI	157,138	3.4%	0.3	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.1	0.0%	16.9x	4.3x	RENATA	139,689	3.1%	0.1	38.0x	4.6x
Pharmaceutical	3,709	3,710	-1.41	-0.04%	34	719,414	9.5%	1,085.5	9.4%	19.4x	2.3x	UPGDCL	135,475	3.0%	0.0	16.7x	4.4x
Fuel & Power	1,706	1,708	-1.66	-0.10%	23	450,099	6.0%	672.3	5.8%	23.6x	1.1x	BEXIMCO	103,571	2.3%	0.2	12.0x	1.2x
Cement	2,604	2,627	-23.15	-0.88%	7	125,082	1.7%	440.9	3.8%	31.8x	2.7x	BERGERPBL	83,480	1.8%	5.4	28.3x	7.0x
Services & Real Esta	2,094	2,132	-38.43	-1.80%	8	82,720	1.1%	859.2	7.5%	30.0x	1.1x	LHBL	82,458	1.8%	334.1	15.2x	4.1x
Engineering	4,504	4,506	-2.53	-0.06%	42	528,606	7.0%	350.3	3.0%	72.3x	1.8x	ICB	74,119	1.6%	0.2	NM	1.7x
Food & Allied	21,571	21,558	+13.60	+0.06%	21	399,151	5.3%	759.7	6.6%	20.0x	8.2x	BXPHARMA	65,222	1.4%	0.1	14.6x	1.5x
IT	3,437	3,279	+157.53	+4.80%	11	44,806	0.6%	1,651.4	14.4%	31.4x	3.2x	BRACBANK	57,596	1.3%	0.3	9.0x	0.9x
Textile	1,613	1,612	+1.56	+0.10%	58	170,009	2.3%	555.7	4.8%	77.4x	1.1x	BEACONPHAR	56,595	1.2%	0.0	80.9x	9.2x
Paper & Printing	11,154	10,954	+199.92	+1.83%	6	42,976	0.6%	711.5	6.2%	41.4x	2.2x	ISLAMIBANK	52,486	1.2%	0.3	8.9x	0.8x
Tannery	3,242	3,263	-20.39	-0.62%	6	34,243	0.5%	243.6	2.1%	49.3x	3.4x	DUTCHBANGL	44,203	1.0%	0.2	7.6x	1.0x
Jute	16,045	16,200	-154.81	-0.96%	3	3,925	0.1%	59.3	0.5%	NM	6.3x	TITASGAS	40,459	0.9%	0.0	32.0x	0.6x
Ceramics	692	693	-1.20	-0.17%	5	31,995	0.4%	83.1	0.7%	49.0x	1.9x	UNILEVERCL	39,740	0.9%	4.4	45.2x	13.2x
Miscellaneous	4,190	4,191	-0.91	-0.02%	14	228,131	3.0%	447.8	3.9%	16.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	89	89	-	-	9	36,540	0.5%	4.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	93	93	+0.02	+0.02%	252	2,980,951	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
AGNISYSL	29.7	+10.0%	267.7	25.2x	1.9x	SQURPHARMA	121,499	7.1%	9.9x	1.7x	BPML	86.6	+3.7%	505.5	23.5x	1.1x
TILIL	40.9	+9.9%	0.4	NM	NM	BATBC	74,086	4.3%	15.3x	6.9x	INTRACO	44.2	-4.3%	426.9	29.4x	3.4x
ADNTEL	133.7	+9.3%	199.4	34.7x	4.9x	BEXIMCO	69,196	4.0%	12.0x	1.2x	NAVANAPHAR	107.1	-0.2%	377.9	24.3x	2.6x
NORTHERN	310.8	+8.7%	11.0	NM	3.8x	RENATA	68,042	4.0%	38.0x	4.6x	GENEXIL	93.0	+3.9%	360.5	27.4x	4.9x
PRAGATILIF	136.3	+8.5%	218.6	NM	NM	BXPHARMA	45,564	2.6%	14.6x	1.5x	LHBL	71.0	-1.3%	334.1	15.2x	4.1x
ISNLTD	61.7	+8.1%	39.1	NM	19.3x	BEACONPHAR	39,617	2.3%	80.9x	9.2x	UNIQUEHRL	78.6	-1.5%	316.9	13.8x	0.9x
IMAMBUTTON	116.0	+7.7%	28.4	NM	24x	GP	38,700	2.2%	13.0x	7.2x	MEGHNALIFE	85.3	-3.8%	308.3	NM	NM
GEMINISEA	812.1	+7.5%	153.2	38.7x	32.0x	BRACBANK	30,976	1.8%	9.0x	0.9x	EHL	107.7	-1.6%	306.0	16.0x	1.4x
NTC	574.1	+7.5%	4.3	NM	284.2x	LHBL	26,980	1.6%	15.2x	4.1x	RUPALILIFE	197.0	+5.2%	284.5	NM	NM
ITC	40.4	+6.9%	241.5	18.1x	2.2x	EBL	24,998	1.5%	6.9x	0.9x	AAMRANET	80.2	+0.8%	275.4	21.0x	2.1x
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)
EASTERNINS	56.4	-9.0%	46.9	16.9x	1.1x	NBL	19,116	1.1%	NM	0.7x	RUPALILIFE	206.0	175.0	11.0	545	106.80
JUTESPINN	415.8	-8.6%	9.5	NM	NM	PUBALIBANK	18,314	1.1%	4.6x	0.6x	SQURPHARMA	206.8	203.5	39.0	210	43.08
ICICL	38.8	-6.7%	79.2	42.9x	2.5x	SEAPEARL	16,847	1.0%	30.9x	12.3x	METROSPIN	42.9	38.1	8.0	798	33.25
MEGHNACEM	61.5	-6.7%	9.8	52.2x	1.2x	ROBI	15,714	0.9%	85.7x	2.3x	GEMINISEA	812.1	756.0	11.0	37	29.34
METROSPIN	36.6	-6.2%	79.4	37.4x	1.7x	ALARABANK	15,220	0.9%	15.8x	1.1x	BRACBANK	32.3	32.3	9.0	697	22.51
PRIMELIFE	66.0	-6.0%	59.9	NM	NM	PRIMEBANK	14,248	0.8%	5.4x	0.7x	BEXIMCO	116.0	104.1	6.0	205	22.09
SANDHANINS	31.6	-5.7%	92.3	NM	NM	BSRMLTD	14,210	0.8%	NM	0.7x	PRAGATILIF	126.5	126.5	2.0	130	16.45
KARNAPHULI	33.6	-5.4%	34.0	17.7x	1.6x	UPGDCL	13,547	0.8%	16.7x	4.4x	RENATA	1,217.9	1,141.8	7.0	12	14.96
DHAKABANK	12.5	-5.3%	0.5	7.5x	0.5x	* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.										
DHAKAINS	64.3	-5.3%	79.2	21.4x	1.9x	** 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										
											ANWARGALV	206.0	194.7	20.0	75	14.90
											BATBC	479.8	479.8	8.0	30	14.45

\* 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	206.0	175.0	106.8	545	11
SQURPHARMA	206.8	203.5	43.1	210	39
METROSPIN	42.9	38.1	33.2	798	8
GEMINISEA	812.1	756.0	29.3	37	11
BRACBANK	32.3	32.3	22.5	697	9
BEXIMCO	116.0	104.1	22.1	205	6
PRAGATILIF	126.5	126.5	16.4	130	2
RENATA	1,217.9	1,141.8	15.0	12	7
ANWARGALV	206.0	194.7	14.9	75	20
BATBC	479.8	479.8	14.5	30	8
SAIFPOWER	29.8	26.9	11.7	404	3
AIL	65.0	63.1	10.4	162	2
BEACHHATCH	45.9	45.8	9.3	202	3
LRBDL	32.8	31.6	8.0	252	15
PTL	78.0	72.0	7.7	103	9
ORIONPHARM	77.0	72.0	6.3	86	11
SONALIPAPR	656.5	585.0	5.9	10	6
BXPHERMA	140.0	138.5	5.4	39	5
BEACONPHAR	243.0	225.0	5.3	22	3
MIDLANDBNK	15.5	14.4	4.8	328	3
GP	261.6	261.6	4.7	18	5
AOL	32.9	32.9	4.4	133	6
<b>Total</b>			<b>489.2</b>		<b>278</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
NBL		0.0%	0%	Record Date	12-Jun-23
GLOBALINS		0.0%	12%	Record Date	13-Jun-23
PROVATIINS		0.0%	12%	Record Date	19-Jun-23
BGIC		0.0%	12%	Record Date	20-Jun-23
DHAKAINS		0.0%	20%	Record Date	22-Jun-23
DGIC		0.0%	5%	Record Date	3-Jul-23
PURABIGEN		3.0%	7%	Record Date	10-Jul-23

#### Important DSE News

##### DHAKAINS

The Board of Directors has recommended 20% Cash Dividend for the year ended December 31, 2022. Date of AGM: 31.07.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 22.06.2023. The Company has also reported EPS of Tk. 3.00, NAV per share (with revaluation) of Tk. 33.99, NAV per share (without revaluation) of Tk. 23.36 and NOCFPS of Tk. 1.61 for the year ended December 31, 2022 as against Tk. 3.64, Tk. 33.78, Tk. 23.14 and Tk. 1.52 respectively for the year ended December 31, 2021.

##### LRBDL

**(Q3 Un-audited):** EPS was Tk. 0.46 for January-March 2023 as against Tk. 0.41 for January-March 2022; EPS was Tk. 1.42 for July 2022-March 2023 as against Tk. 1.46 for July 2021-March 2022. NOCFPS was Tk. 2.78 for July 2022-March 2023 as against Tk. 2.59 for July 2021-March 2022. NAV per share (with revaluation) was Tk. 38.37 as on March 31, 2023 and Tk. 37.95 as on June 30, 2022 and NAV per share (without revaluation) was Tk. 34.34 as on March 31, 2023 and Tk. 33.90 as on June 30, 2022.

##### RUPALIBANK

**(Q1 Un-audited):** Consolidated EPS was Tk. 0.38 for January-March 2023 as against Tk. 0.21 (Restated) for January-March 2022. Consolidated NOCFPS was Tk. (3.74) for January-March 2023 as against Tk. 3.80 (Restated) for January-March 2022. Consolidated NAV per share was Tk. 36.77 as on March 31, 2023 and Tk. 36.10 (Restated) as on December 31, 2022.

##### NCCBANK

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.

##### STANDBANKL

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 2.50% Stock Dividend for the year ended December 31, 2022.

##### EXIMBANK

Mazakat Harun, one of the Sponsors of the company, has expressed his intention to sell 4,80,000 shares out of his holding of 1,02,29,618 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange Ltd. within next 30 working days.

##### CENTRALINS

Dr. Jahanara Arzu, one of the Directors of the Company, has expressed her intention to buy 1,00,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange Ltd. within next 30 working days.

##### CONTININS

Md Tehsin Rashid, one of the Directors of the company, has submitted a declaration to receive 1,45,300 shares from his mother Fatema Rashid (General shareholder of the company), by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of approval letter by DSE.

Md Tehsin Rashid, one of the Directors of the company, has submitted a declaration to receive 4,65,500 shares from his wife Shusmita Sharif Islam (General shareholder of the company), by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of approval letter by DSE.

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