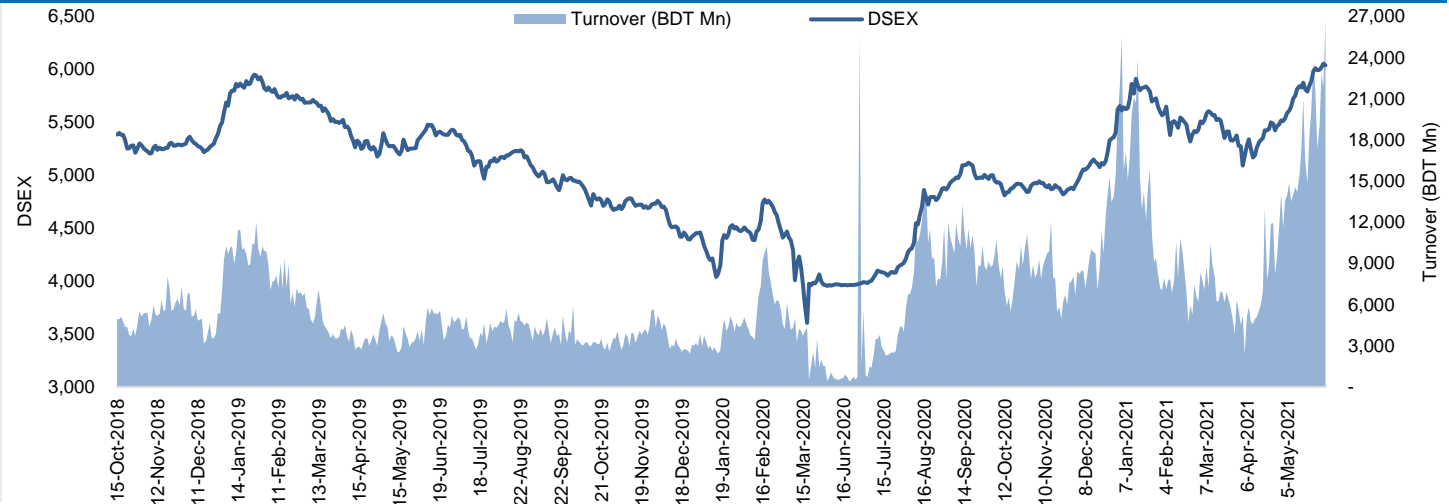


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.25%) lost 15.14 points and closed at 6,038.29. The blue-chip index DS30 (+0.86%), the Shariah-based index DSES (+0.47%), and the large-cap index CDSET (+0.34%) closed at 2,222.55, 1,299.31, and 1,238.48 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 4.01% followed by Pharmaceutical (+0.94%), and Food & Allied (+0.00%). Bank experienced the highest loss of 3.46% followed by Telecommunication (-1.80%), Fuel & Power (-0.66%), and NBF1 (-0.11%). **Today's DSE turnover of BDT 26,694mn is 10-year 6-month high.** Block trades contributed 1.7% of the overall market turnover. Bangladesh Export Import Company Ltd. (+9.8%) was the most traded share with a turnover of BDT 2,942



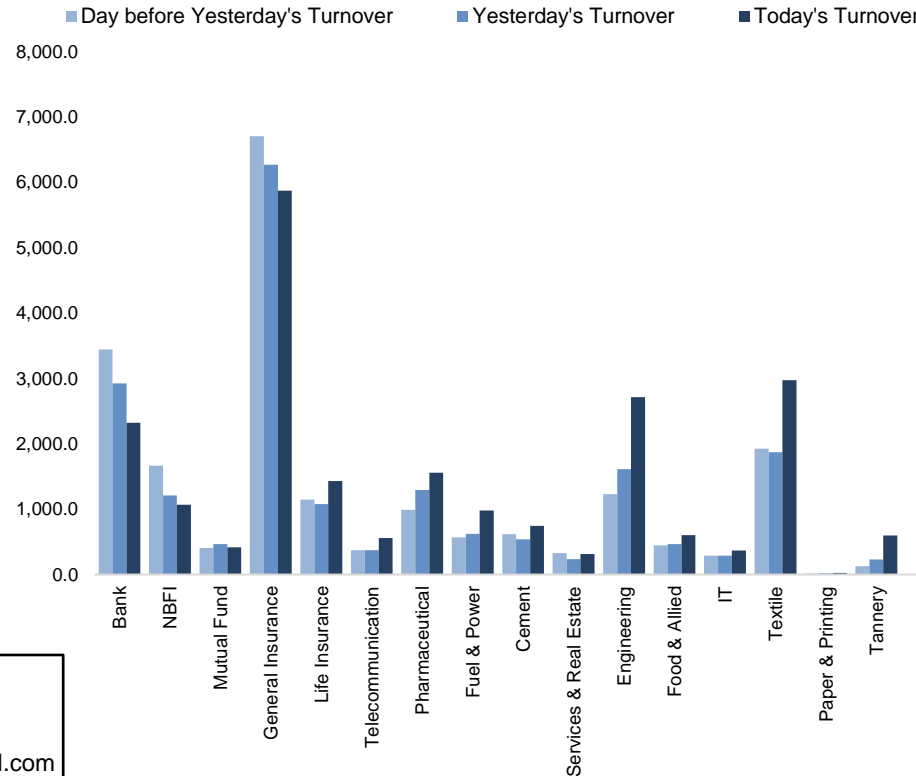
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,038.29	6,053.43	-15.14	-0.25%	+11.8%
DS30	2,222.55	2,203.59	+18.96	+0.86%	+13.2%
DSES	1,299.31	1,293.17	+6.14	+0.47%	+4.6%
CDSET	1,238.48	1,234.31	+4.17	+0.34%	+10.3%

	Advanced	Declined	Unchanged	Total
All Category	145	201	20	366
A Category (Equity)	101	157	9	267
B Category (Equity)	27	29	4	60
N Category (Equity)	4	7	0	11
Z Category (Equity)	13	8	7	28
Mutual Funds	1	31	4	36
Corporate Bonds	0	1	0	1

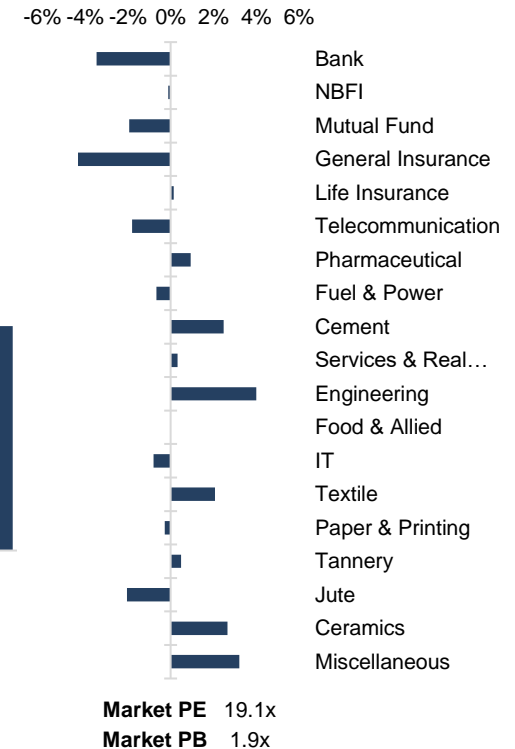
	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,083,685	5,089,475	-0.1%
	Mn USD	59,836	59,904	
Turnover	Mn BDT	26,694	21,823	+22.3%
	Mn USD	314	257	
Volume	Mn Shares	795	658	+20.7%
No. of Trade		367,892	293,067	+25.5%

<b>Md. Rafiqul Islam</b> Research Associate (880) 1708805229 mrafiqulislam@bracepl.com	<b>Md Mahirul Quddus</b> Research Associate (880) 1709636546 mmahirul.quddus@bracepl.com
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**Figure: Sectorial Turnover (BDT Mn)**



**Figure: Sectorial Mcap Change**



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	1,532	1,587	-54.94	-3.46%	31	662,109	14.7%	2,319.9	8.8%	8.6x	0.8x	GP	473,010	10.5%	40.7	13.4x	7.8x
NBFI	2,062	2,064	-2.24	-0.11%	23	202,572	4.5%	1,067.9	4.1%	43.7x	3.2x	WALTONHIL	422,222	9.4%	166.4	42.3x	7.4x
Mutual Fund	993	1,012	-19.56	-1.93%	37	44,792	1.0%	415.0	1.6%	NM	0.9x	BATBC	293,328	6.5%	313.9	25.0x	7.7x
General Insurance	5,411	5,655	-244.51	-4.32%	38	139,937	3.1%	5,873.3	22.4%	26.3x	2.6x	ROBI	234,136	5.2%	429.8	NM	3.5x
Life Insurance	2,585	2,581	+3.77	+0.15%	12	70,673	1.6%	1,431.4	5.5%	NM	NM	SQURPHARMA	189,169	4.2%	124.7	13.0x	2.2x
Telecommunication	6,264	6,378	-114.49	-1.80%	3	735,872	16.3%	560.3	2.1%	18.9x	5.5x	UPGDCL	160,692	3.6%	42.0	16.6x	5.3x
Pharmaceutical	3,405	3,373	+31.65	+0.94%	31	620,369	13.8%	1,555.1	5.9%	20.4x	2.5x	RENATA	124,324	2.8%	25.7	27.1x	5.1x
Fuel & Power	1,692	1,703	-11.21	-0.66%	22	452,482	10.1%	979.4	3.7%	12.3x	1.4x	ICB	88,962	2.0%	37.3	43.0x	2.0x
Cement	2,074	2,024	+50.10	+2.48%	7	121,779	2.7%	741.9	2.8%	21.3x	2.6x	BEXIMCO	84,565	1.9%	2,942.4	23.3x	1.3x
Services & Real Estate	1,089	1,085	+3.53	+0.33%	8	42,304	0.9%	313.0	1.2%	NM	0.9x	BERGERPBL	83,471	1.9%	32.1	33.8x	8.5x
Engineering	4,989	4,796	+192.44	+4.01%	42	608,990	13.5%	2,715.5	10.3%	33.5x	2.8x	BXPBARMA	81,014	1.8%	333.1	17.8x	2.3x
Food & Allied	21,279	21,279	+0.41	+0.00%	20	385,023	8.6%	600.5	2.3%	32.8x	8.1x	LHBL	70,495	1.6%	341.5	24.6x	3.9x
IT	2,589	2,610	-20.65	-0.79%	11	30,740	0.7%	365.8	1.4%	31.0x	2.2x	BRACBANK	68,077	1.5%	61.0	14.1x	1.3x
Textile	1,172	1,148	+23.84	+2.08%	56	122,311	2.7%	2,971.0	11.3%	NM	0.8x	MARICO	66,497	1.5%	16.8	21.4x	40.6x
Paper & Printing	5,103	5,116	-13.68	-0.27%	4	14,373	0.3%	25.5	0.1%	38.8x	1.0x	SUMITPOWER	45,705	1.0%	224.4	8.1x	1.3x
Tannery	1,798	1,790	+8.79	+0.49%	6	19,626	0.4%	596.0	2.3%	NM	2.0x	ISLAMIBANK	44,919	1.0%	14.9	9.3x	0.7x
Jute	8,341	8,514	-173.56	-2.04%	3	2,057	0.0%	16.1	0.1%	NM	15.1x	DUTCHBANGL	43,670	1.0%	278.0	7.7x	1.3x
Ceramics	521	508	+13.52	+2.66%	5	26,459	0.6%	263.9	1.0%	56.8x	1.8x	TITASGAS	34,821	0.8%	8.4	9.6x	0.5x
Miscellaneous	3,933	3,811	+122.53	+3.22%	14	198,395	4.4%	3,430.7	13.1%	29.9x	2.0x	EBL	34,721	0.8%	13.8	7.6x	1.0x
												OLYMPIC	34,050	0.8%	12.0	16.4x	3.9x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FORTUNE	28.6	+10.0%	593.2	23.8x	2.1x
RSRMSTEEL	21.0	+9.9%	16.4	NM	0.4x
RUNNERAUTO	60.9	+9.9%	64.5	38.8x	0.9x
BEXIMCO	96.5	+9.8%	2,942.4	23.3x	1.3x
SPCERAMICS	29.2	+9.8%	215.3	84.8x	1.0x
COPPERTECH	22.5	+9.8%	63.1	35.9x	1.9x
OIMEX	22.6	+9.7%	8.9	NM	1.6x
AFCAGRO	19.3	+9.7%	36.6	NM	1.1x
ALIF	10.3	+9.6%	189.2	20.2x	0.8x
SAFKOSPINN	14.0	+9.4%	14.9	NM	0.8x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	123,773	7.7%	13.0x	2.2x
BATBC	77,585	4.8%	25.0x	7.7x
RENATA	60,695	3.8%	27.1x	5.1x
BEXIMCO	58,730	3.7%	23.3x	1.3x
BXPBARMA	56,564	3.5%	17.8x	2.3x
GP	47,301	3.0%	13.4x	7.8x
BRACBANK	36,598	2.3%	14.1x	1.3x
LHBL	24,899	1.6%	24.6x	3.9x
EBL	24,242	1.5%	7.6x	1.0x
ROBI	23,296	1.5%	NM	3.5x
ISLAMIBANK	21,867	1.4%	9.3x	0.7x
OLYMPIC	20,654	1.3%	16.4x	3.9x
BEACONPHAR	20,373	1.3%	28.8x	5.5x
CITYBANK	18,696	1.2%	6.0x	0.9x
PUBALIBANK	17,260	1.1%	6.8x	0.6x
SUMITPOWER	16,815	1.1%	8.1x	1.3x
NBL	16,718	1.0%	6.8x	0.5x
UPGDCL	16,069	1.0%	16.6x	5.3x
PRIMEBANK	15,259	1.0%	8.7x	0.8x
ALARABANK	14,671	0.9%	11.0x	1.0x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	96.5	+9.8%	2,942.4	23.3x	1.3x
IFADAUTOS	57.9	+2.5%	612.4	63.5x	1.4x
FORTUNE	28.6	+10.0%	593.2	23.8x	2.1x
RUPALIINS	49.6	-1.4%	505.5	26.5x	2.3x
ROBI	44.7	-4.1%	429.8	NM	3.5x
LANKABAFIN	36.0	-0.8%	418.1	19.9x	2.0x
SANDHANINS	41.0	-0.7%	401.3	NM	NM
GLOBALINS	67.9	-7.0%	395.1	43.8x	4.9x
SSSTEEL	20.8	+6.7%	388.0	11.0x	1.3x
SONARBAINS	97.8	-0.3%	358.8	45.7x	4.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NCCBANK	15.1	-16.1%	108.7	7.2x	0.7x
PHENIXINS	67.3	-9.8%	233.0	27.2x	1.8x
RELIANCINS	78.0	-9.7%	60.0	14.6x	1.3x
SOUTHEASTB	15.1	-9.6%	128.0	7.3x	0.6x
ASIAPACINS	68.7	-8.9%	201.7	30.9x	3.2x
DUTCHBANGL	79.4	-8.3%	278.0	7.7x	1.3x
JANATAINS	45.0	-8.2%	78.5	34.8x	3.1x
PRIMEBANK	22.1	-7.9%	179.1	8.7x	0.8x
AMANFEED	39.8	-7.9%	133.2	14.9x	1.1x
UNITEDINS	57.4	-7.7%	19.1	NM	1.9x

Top 30 Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
BEXIMCO	95.0	89.0	114.6	1,271	13
LRGLOBMF1	7.4	7.4	62.5	8,446	2
PROVATIINS	190.0	190.0	41.8	220	3
NRBCBANK	38.0	36.0	34.5	949	7
MERCINS	62.0	58.5	31.0	500	9
SUMITPOWER	48.3	47.8	24.4	508	4
RDFOOD	32.6	32.0	15.4	480	8
SILCOPHL	24.0	24.0	12.0	500	1
KTL	24.0	23.0	8.2	347	3
BDFINANCE	40.5	40.5	8.1	200	2

Top 30 Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
LANKABAFIN	37.0	36.7	7.5	203	3
PROGRESLIF	133.5	124.5	7.3	55	2
REPUBLIC	68.5	60.1	6.3	98	2
SAFKOSPINN	13.0	13.0	5.2	402	2
SALVOCHEM	20.9	20.5	4.6	220	2
GLOBALINS	75.0	69.7	4.3	58	2
IFADAUTOS	60.0	59.5	4.2	70	3
PRIMELIFE	83.7	83.7	4.2	50	2
RUPALILIFE	80.0	80.0	3.2	40	1
BXPHERMA	173.0	173.0	3.0	17	1
BATBC	540.0	538.0	2.8	5	2
BDTHAI	27.6	27.6	2.8	100	1
GREENDELT	110.0	110.0	2.8	25	1
CITYBANK	26.4	26.4	2.6	100	2
FORTUNE	26.2	26.2	2.6	100	1
PARAMOUNT	91.4	91.4	2.6	29	1
NHFIL	40.9	40.9	2.2	55	1
DUTCHBANGL	88.0	85.0	2.1	25	2
GBBPOWER	36.0	35.0	1.8	52	3
RUNNERAUTO	58.0	58.0	1.7	30	2
<b>Total</b>			<b>451.4</b>		<b>119</b>

**Important DSE News**
**PHENIXINS**

The Board of Directors has recommended 15% cash dividend for the year ended on December 31, 2020. Date of AGM: 11.08.2021, Time: 2:30 PM, Venue: Digital Platform. Record Date: 30.06.2021. The Company has also reported EPS of Tk. 2.33, NAV per share of Tk. 39.10 and NOCFPS of Tk. 2.07 for the year ended on December 31, 2020 as against Tk. 2.31, Tk. 34.88 and Tk. 0.63 respectively for the same period of the previous year.

(Q1 Un-audited): EPS was Tk. 0.69 for January-March 2021 as against Tk. 0.55 for January-March 2020. NOCFPS was Tk. 0.29 for January-March 2021 as against Tk. 0.35 for January-March 2020. NAV per share was Tk. 37.18 as on March 31, 2021 and Tk. 35.41 as on March 31, 2020.

**REGL**

In the interest of investors and development of the capital market, the Commission in exercise of its power conferred by the Section 20A of the Securities and Exchange Ordinance, 1969 (XVII of 1969), hereby directs through Order No. BSEC/Surveillance/2020-975/212 dated June 03, 2021, the Dhaka Stock Exchange Limited and Chittagong Stock Exchange Limited to impose standard downward price change limit (circuit breaker) of 2% (two percent) of following 30 companies based on the reference price/previous trading day's closing price. Upper limit of the circuit breaker and other conditions of the Order No. BSEC/CMRRCD/2001-07/229 dated November 14, 2019 shall remained unchanged: 01. Renwick Jaineswar & Co. (BD) Ltd., 02. Monno Agro and General Machinery Limited, 03. Bata Shoe Company (Bangladesh) Limited, 04. Kohinoor Chemicals Company (Bangladesh) Ltd., 05. Northern Jute Manufacturing Co. Ltd. 06. Standard Ceramic Industries Limited 07. Wata Chemicals Limited, 08. Sonali Paper & Board Mills Ltd., 09. Apex Footwear Limited 10. Kay & que (Bangladesh) Limited, 11. Bangladesh Autocars Limited 12. Stylecraft Limited 13. Gemini Sea Food Limited 14. Eastern Cables Limited 15. Apex Spinning and knitting Mills Limited 16. Monno Ceramic Industries Limited 17. Bangas Limited 18. CVO Petro Chemicals Refinery Limited 19. Atlas Bangladesh Limited 20. Apex Tannery Limited 21. Samata Leather Complex Ltd., 22. National Tubes Limited 23. Aziz Pipes Ltd., 24. Sea Pearl Beach & Spa Limited 25. Hakkani Pulp & Paper Mills Ltd., 26. Orion Infusion Ltd., 27. Legacy Footwear Ltd., 28. Sk. Stims & Industries Limited 29. National Polymer Industries Limited 30. Daffodil Computers Limited.

**MICEMENT**

Referring to the earlier news of the Company disseminated by DSE on 11.10.2020 regarding postponement of setting up of the 6th Unit, the Company has further informed that the Board of Directors were taken following decision: Approved resumption of installation of the 6th Unit of the Company (which was postponed earlier) with a Production Capacity of 8,280 Metric Ton per day at its existing Factory premises, West Mukterpur, Munshiganj to increase the overall Production Capacity of the Company from existing 11,000 Metric Ton per day to 19,280 Metric Ton per day at an estimated Project Cost of Tk. 770.00 Crore only approximately including the civil construction. The probable schedule of the Commercial Production is February, 2023.

The Company has further informed that they have mistakenly submitted the wrong PSI of Third Quarter Un-Audited Financial Statements for the period ended 31st March, 2021. The Board of Directors of the Company has recommended to revise the 3rd Quarter Un-Audited Financial Statements within three days and they will submit the revised accounts along with the PSI.

**GPHISPAT**

The Company has informed that the Board of Directors has approved the revaluation of Fixed Assets (Land) as on March 31, 2021. The revaluation was performed by renowned Chartered Accountancy firm Ahmed Zaker & Co. The valuation of land was based on estimated net realizable value method (the market approach) and rest of the class of assets was based on depreciated replacement cost method (the cost approach) complying with International Valuation Standards (IVS) and BSEC notification dated 18 August 2013. The amount of Fixed Assets has been increased from Tk. 3,85,16,77,558.00 to Tk. 8,18,20,60,663.00. Revaluation surplus was Tk. 4,33,03,83,105.00. They also informed that after revaluation Net Assets Value would be Tk. 11,72,42,17,480 and NAV per share would be Tk. 29.52.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
JANATAINS	-	5.0%	6.0%	Record Date	07-Jun-21
ISLAMIINS	-	10.0%	0.0%	Record Date	07-Jun-21
RUPALIINS	-	0.0%	10.0%	Record Date	10-Jun-21
ALARABANK	-	0.0%	15.0%	Record Date	10-Jun-21
CENTRALINS	-	7.5%	6.0%	Record Date	17-Jun-21
TAKAFULINS	-	0.0%	10.0%	Record Date	21-Jun-21

**Disclaimer:** This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.

**ISLAMIBANK**

The Company has informed that the Board of Director has taken decision to issue IBBL 2nd Perpetual Mudaraba Bond of BDT 8,000 million, for inclusion in Tier 1 capital as regulatory Additional Tier 1 Capital under Basel-III norms, which will be issued on Private Placement basis for BDT 7200 million and the rest amount of BDT 800 million on Public offer basis instead of Private Placement basis for the entire amount of BDT 8000 million in line with Directive (No. BSEC/CMRRCD/2009-193/19, dated 23 May, 2021) issued by Bangladesh Securities and Exchange Commission, other regulatory requirements and subject to approval of the Regulatory Authorities as well as the approval of the Shareholders of the Company.

**RAKCERAMIC**

Referring to the earlier news of the Company disseminated by DSE on 20.05.2021 regarding Maintenance of Production Lines and Others, the Company has further informed that the machineries of tiles Production Line-1 will remain under maintenance for further 7 (Seven) days from 6th of June, 2021 till 12th of June, 2021. The company will announce the resumption of operations of tiles Production Line-1 as soon as it is ready after the completion of maintenance work.