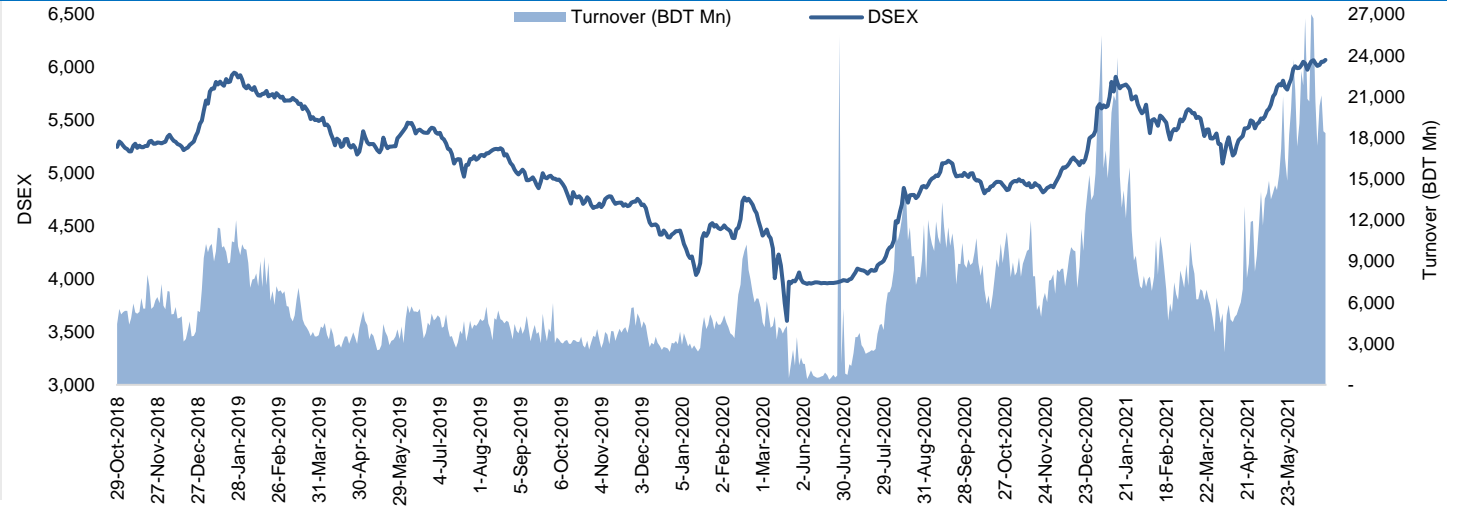


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.28%) gained 16.65 points and closed at 6,069.41. The blue-chip index DS30 (+0.47%), the Shariah-based index DSES (+0.44%), and the large-cap index CDSET (+0.32%) closed at 2,207.30, 1,296.60, and 1,228.85 points, respectively. All the large-cap sectors posted positive performance today. Bank booked the highest gain of 1.19% followed by NBF1 (+0.76%), Pharmaceutical (+0.65%), Engineering (+0.53%), Fuel & Power (+0.52%), Food & Allied (+0.36%), and Telecommunication (-0.25%), respectively. Block trades contributed 13.1% of the overall market turnover. Pioneer Insurance Company Ltd. (-4.8%) was the most traded share with a turnover of BDT 1,632 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,069.41	6,052.76	+16.65	+0.28%	+12.4%
DS30	2,207.30	2,197.06	+10.24	+0.47%	+12.4%
DSES	1,296.60	1,290.93	+5.66	+0.44%	+4.4%
CDSET	1,228.85	1,224.99	+3.86	+0.32%	+9.4%

	Advanced	Declined	Unchanged	Total
All Category	156	179	38	373
A Category (Equity)	111	132	28	271
B Category (Equity)	22	29	8	59
N Category (Equity)	6	5	0	11
Z Category (Equity)	17	13	2	32
Mutual Funds	8	13	15	36
Corporate Bonds	1	1	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,099,286	5,081,348	
	Mn USD	60,020	59,809	+0.4%
Turnover	Mn BDT	18,353	18,472	
	Mn USD	216	217	-0.6%
Volume	Mn Shares	435	485	-10.3%
No. of Trade		247,385	269,745	-8.3%

Figure: Sectorial Turnover (BDT Mn)

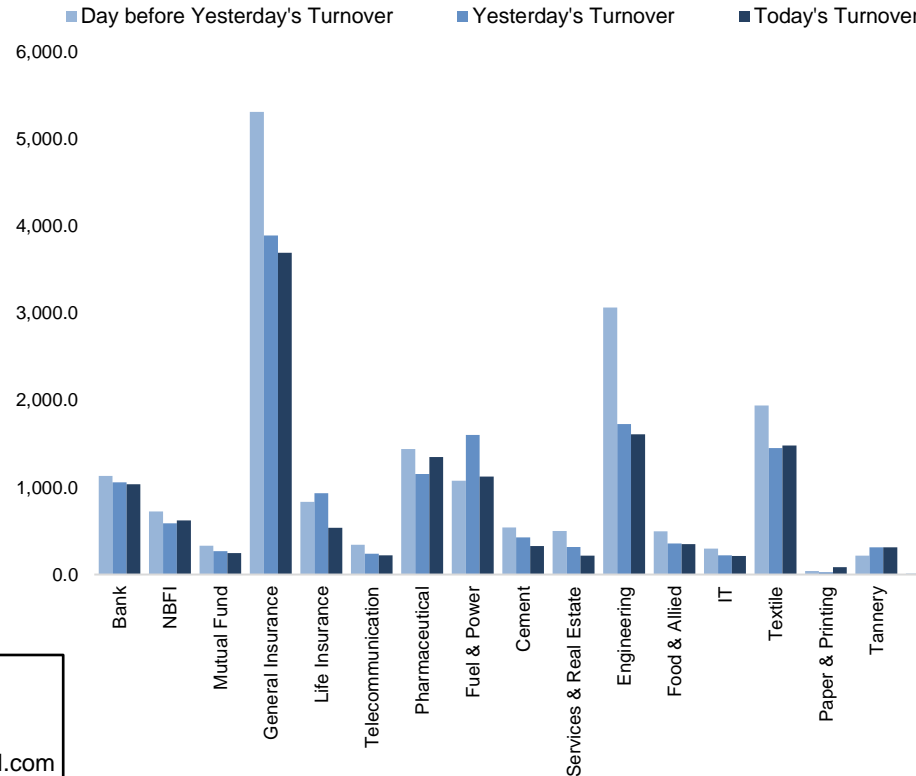
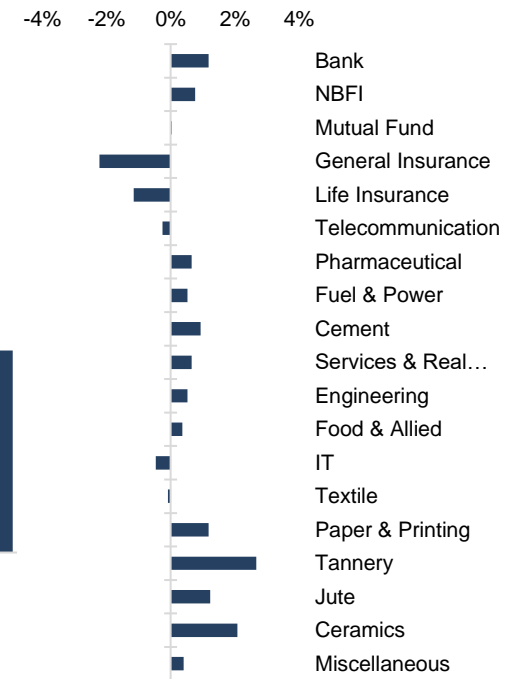


Figure: Sectorial Mcap Change



Market PE 19.1x
Market PB 1.9x

Md. Rafiqul Islam Research Associate (880) 1708805229 mrafiqulislam@bracepl.com	Md Mahirul Quddus Research Associate (880) 1709636546 mmahirul.quddus@bracepl.com
---	---

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	1,498	1,480	+17.60	+1.19%	31	647,100	14.3%	1,036.3	6.5%	8.5x	0.8x	GP	463,558	10.3%	45.5	13.1x	7.6x
NBFI	2,066	2,050	+15.61	+0.76%	23	202,913	4.5%	619.4	3.9%	43.8x	3.2x	WALTONHIL	406,621	9.0%	39.7	40.7x	7.1x
Mutual Fund	1,007	1,007	+0.40	+0.04%	37	45,457	1.0%	244.5	1.5%	NM	0.9x	BATBC	289,116	6.4%	124.6	24.7x	7.6x
General Insurance	5,900	6,034	-133.71	-2.22%	38	152,597	3.4%	3,690.2	23.2%	28.6x	2.9x	ROBI	229,421	5.1%	134.8	NM	3.5x
Life Insurance	2,702	2,733	-31.60	-1.16%	12	73,863	1.6%	536.2	3.4%	NM	NM	SQURPHARMA	189,523	4.2%	61.3	13.1x	2.2x
Telecommunication	6,144	6,160	-15.30	-0.25%	3	721,871	16.0%	219.4	1.4%	18.6x	5.4x	UPGDCL	160,807	3.6%	23.5	16.7x	5.3x
Pharmaceutical	3,434	3,411	+22.31	+0.65%	31	625,589	13.9%	1,346.4	8.4%	20.6x	2.6x	RENATA	126,244	2.8%	64.2	27.5x	5.2x
Fuel & Power	1,726	1,717	+8.99	+0.52%	22	461,471	10.2%	1,122.1	7.0%	12.6x	1.4x	ICB	90,171	2.0%	28.5	43.5x	2.0x
Cement	2,032	2,014	+18.87	+0.94%	7	119,325	2.6%	326.1	2.0%	20.9x	2.5x	BEXIMCO	86,948	1.9%	1,514.6	23.9x	1.3x
Services & Real Estate	1,109	1,102	+7.20	+0.65%	8	43,083	1.0%	217.1	1.4%	NM	0.9x	BERGERPBL	82,724	1.8%	9.9	33.5x	8.5x
Engineering	4,972	4,946	+26.04	+0.53%	42	606,907	13.4%	1,608.0	10.1%	30.1x	2.8x	BXPBARMA	80,300	1.8%	291.9	17.6x	2.3x
Food & Allied	21,098	21,022	+76.00	+0.36%	20	381,738	8.5%	347.5	2.2%	32.5x	8.0x	MARICO	68,207	1.5%	10.6	21.9x	41.7x
IT	2,691	2,704	-12.42	-0.46%	11	31,956	0.7%	212.7	1.3%	29.5x	2.3x	LHBL	67,824	1.5%	64.9	23.6x	3.7x
Textile	1,250	1,251	-1.04	-0.08%	58	132,077	2.9%	1,480.1	9.3%	NM	0.9x	BRACBANK	67,381	1.5%	18.4	13.9x	1.3x
Paper & Printing	5,061	5,001	+59.44	+1.19%	6	14,498	0.3%	82.6	0.5%	39.0x	1.0x	SUMITPOWER	48,054	1.1%	216.0	8.6x	1.3x
Tannery	2,022	1,969	+52.63	+2.67%	6	22,061	0.5%	313.2	2.0%	NM	2.2x	DUTCHBANGL	46,475	1.0%	97.4	8.2x	1.4x
Jute	7,988	7,890	+97.68	+1.24%	3	1,970	0.0%	9.1	0.1%	NM	14.3x	ISLAMIBANK	44,919	1.0%	10.3	9.3x	0.7x
Ceramics	541	530	+11.05	+2.09%	5	27,456	0.6%	212.0	1.3%	58.8x	1.8x	TITASGAS	35,216	0.8%	37.5	9.8x	0.5x
Miscellaneous	4,060	4,043	+16.30	+0.40%	14	204,772	4.5%	2,316.5	14.5%	30.8x	2.0x	OLYMPIC	34,509	0.8%	14.9	16.7x	3.9x
												UNILEVERCL	33,206	0.7%	1.6	70.4x	22.4x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONNOFABR	17.6	+10.0%	0.1	NM	0.6x
NFML	41.9	+10.0%	422.0	32.5x	3.2x
SALVOCHEM	29.8	+10.0%	109.9	67.1x	2.3x
MONOSPOOL	88.4	+10.0%	2.1	NM	2.2x
TAMIJTEX	21.0	+9.9%	0.0	70.0x	0.3x
INDEXAGRO	124.9	+9.9%	115.4	86.1x	2.2x
UNIQUEHRL	37.6	+9.9%	34.4	NM	0.5x
ARAMITCEM	46.5	+9.9%	36.8	NM	1.8x
AMANFEED	53.4	+9.9%	157.3	20.0x	1.4x
FORTUNE	48.1	+9.8%	267.6	40.0x	3.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	124,005	7.7%	13.1x	2.2x
BATBC	76,471	4.7%	24.7x	7.6x
RENATA	61,632	3.8%	27.5x	5.2x
BEXIMCO	60,386	3.7%	23.9x	1.3x
BXPBARMA	56,066	3.5%	17.6x	2.3x
GP	46,356	2.9%	13.1x	7.6x
BRACBANK	36,224	2.2%	13.9x	1.3x
LHBL	23,956	1.5%	23.6x	3.7x
ROBI	22,827	1.4%	NM	3.5x
EBL	22,377	1.4%	7.0x	0.9x
ISLAMIBANK	21,867	1.4%	9.3x	0.7x
OLYMPIC	20,933	1.3%	16.7x	3.9x
BEACONPHAR	18,643	1.2%	26.4x	5.1x
CITYBANK	17,908	1.1%	5.7x	0.9x
SUMITPOWER	17,679	1.1%	8.6x	1.3x
PUBALIBANK	17,189	1.1%	6.8x	0.6x
NBL	16,083	1.0%	6.5x	0.4x
UPGDCL	16,081	1.0%	16.7x	5.3x
PRIMEBANK	14,845	0.9%	8.5x	0.8x
ALARABANK	13,371	0.8%	10.0x	1.0x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PIONEERINS	191.4	-4.8%	1,632.1	25.8x	4.0x
BEXIMCO	96.8	-1.0%	1,514.6	23.9x	1.3x
ORIONPHARM	59.9	+5.6%	428.2	22.0x	0.9x
NFML	41.9	+10.0%	422.0	32.5x	3.2x
BXPBARMA	180.0	+2.9%	291.9	17.6x	2.3x
FORTUNE	48.1	+9.8%	267.6	40.0x	3.5x
SUMITPOWER	45.0	+1.6%	216.0	8.6x	1.3x
CONFIDCEM	143.7	+2.7%	205.9	9.0x	1.9x
LRBDL	52.4	+3.1%	205.2	36.9x	1.5x
NRBCBANK	36.3	+7.7%	203.4	14.9x	2.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SEAPEARL	58.6	-10.0%	0.2	76.8x	5.2x
SKTRIMS	46.1	-10.0%	2.0	55.2x	3.4x
SAMATALETH	79.1	-9.8%	25.8	NM	5.5x
PF1STMF	10.7	-9.3%	25.3	NM	1.8x
STANCERAM	230.0	-8.7%	1.5	NM	26.0x
NURANI	8.1	-8.0%	23.0	NM	0.9x
MONNOAGML	604.3	-7.0%	42.0	NM	44.5x
DBH	75.1	-6.8%	136.4	14.0x	1.7x
RINGSHINE	9.9	-6.6%	94.1	34.5x	0.6x
TUNGHAI	4.3	-6.5%	3.3	NM	0.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
PROVATIINS	197.0	190.0	#####	5,369	17
BATBC	537.0	535.0	663.3	1,235	3
NFML	39.1	35.5	230.0	6,076	26
BXPBARMA	171.4	171.4	197.1	1,150	1
FORTUNE	43.7	43.4	103.6	2,380	3
RENATA	1,297.0	1,297.0	60.2	46	1
PHOENIXFIN	27.5	27.5	27.5	1,000	1
BEXIMCO	98.6	98.6	19.7	200	1
PRAGATIINS	126.9	126.9	8.6	68	1
SKTRIMS	51.0	50.0	6.0	119	5

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
AMANFEED	49.2	49.0	5.1	104	5
GREENDELTA	149.2	144.0	4.9	34	2
PENINSULA	22.6	22.6	4.8	211	1
NRBCBANK	36.9	36.9	3.7	100	1
SALVOCHEM	25.5	25.1	3.5	140	2
NAHEEACP	43.9	43.9	3.5	79	1
MARICO	2,140.0	2,140.0	3.0	1	1
POPULARLIF	105.0	104.5	2.7	26	2
UNIQUEHRL	36.0	36.0	2.3	64	3
AIL	36.0	35.0	1.7	49	3
DACCADYE	16.0	16.0	1.6	100	1
STANDARINS	80.0	80.0	1.4	17	1
SAFKOSPINN	26.4	26.4	1.3	50	1
RUPALILIFE	82.3	82.1	1.3	16	2
GBBPOWER	33.0	32.2	1.1	34	2
PDL	13.5	13.5	1.1	80	1
DHAKAINS	104.9	104.9	0.9	9	1
WALTONHIL	1,260.0	1,260.0	0.9	1	1
CRYSTALINS	73.9	73.9	0.7	10	1
RAKCERAMIC	36.5	36.5	0.7	20	1
NORTHRNINS	70.0	70.0	0.7	10	1
SAMORITA	70.0	70.0	0.7	10	1
EMERALDOIL	23.5	23.5	0.6	26	1
ORIONPHARM	58.0	58.0	0.6	10	1
ARAMIT	329.0	329.0	0.6	2	1
PTL	54.2	54.2	0.5	10	1
0	0.0	0.0	-		0
Total			2,413.0		98

Important DSE News
IFIC

On the close of operation on June 17, 2021, the Fund has reported Net Asset Value (NAV) of Tk. 11.43 per unit on the basis of current market price and Tk. 11.12 per unit on the basis of cost price against face value of Tk. 10.00 whereas total Net Assets of the Fund stood at Tk. 1,814,819,740.26 on the basis of current market price and Tk. 1,765,920,722.84 on the basis of cost price after considering all assets and liabilities of the Fund. The Company has informed that the Board of Directors of the Company has decided to raise BDT 10,000.00 million through issuance of Perpetual Bond as Additional Tier-1 Capital to support the Bank under BASEL - III norms complying with Bangladesh Bank Guidelines on Risk Based Capital Adequacy, on Private Placement basis for BDT 9,000.00 million and on Public Offer basis for BDT 1,000.00 million in line with the Directives. Issued on 23 May, 2021 by Bangladesh Securities & Exchange Commission subject to the approval of the Shareholders of the Bank and concerned regulatory authorities and took the decisions to held an EGM. Date of EGM: 26.08.2021, time: 11:00 AM, venue: Digital Platform. Record Date for EGM: 13.07.2021.

BRACBANK

Mr. Asif Saleh, one of the Nominated Directors of BRAC Bank Ltd., has expressed his intention to buy 31000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

JAMUNABANK

Mr. Arifur Rahman, one of the Sponsors of Jamuna Bank Ltd., has further reported that he has completed his sale of 30,00,000 shares of the Company at prevailing market price through Stock Exchange (DSE) as per declaration disseminated on 03.06.2021.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
TAKAFULINS	-	0.0%	10.0%	Record Date	21-Jun-21
ASIAINS	-	0.0%	12.0%	Record Date	22-Jun-21
BATASHOE	-	0.0%	25.0%	Record Date	22-Jun-21
GLOBALINS	-	0.0%	10.0%	Record Date	22-Jun-21
NORTHRNINS	-	0.0%	10.0%	Record Date	23-Jun-21
REPUBLIC	-	7.0%	7.0%	Record Date	24-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.