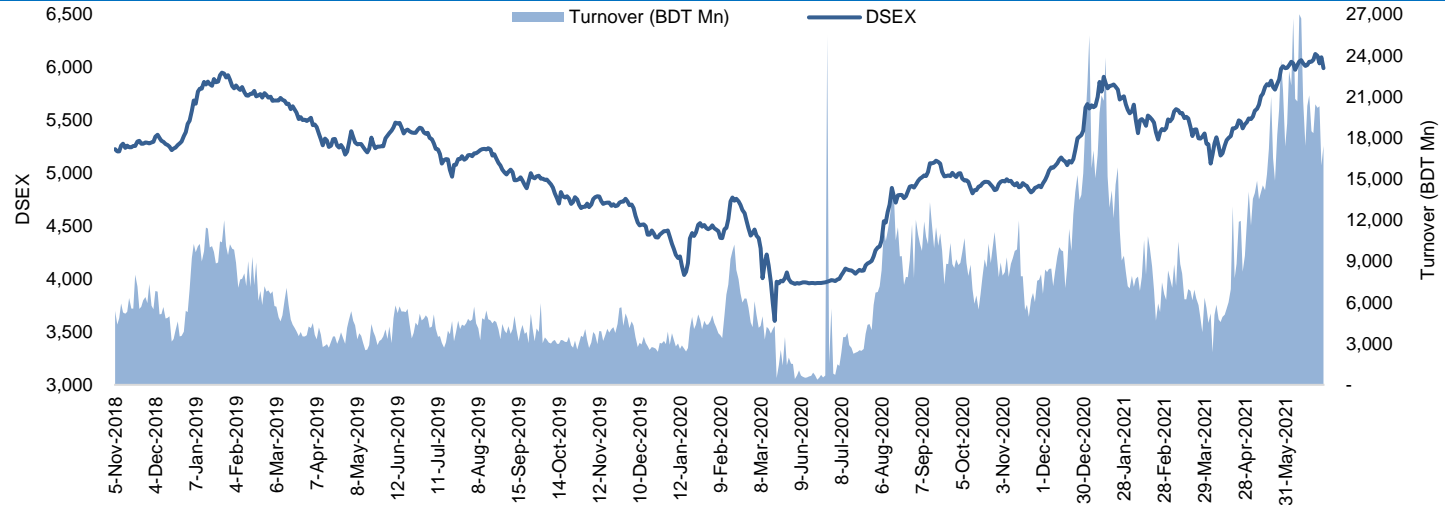


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.64%) lost 100.11 points and closed at 5,992.73. The blue-chip index DS30 (-1.40%), the Shariah-based index DSES (-1.11%), and the large-cap index CDSET (-1.33%) closed at 2,168.64, 1,287.43, and 1,210.66 points, respectively. All the large-cap sectors posted negative performance today. NBFI experienced the highest loss of 2.18% followed by Engineering (-2.00%), Fuel & Power (-1.45%), Food & Allied (-1.33%), Pharmaceutical (-1.10%), Bank (-1.10%), and Telecommunication (-0.71%), respectively. Block trades contributed 12.7% of the overall market turnover. Bangladesh Export Import Company Ltd. (-4.5%) was the most traded share with a turnover of BDT 1,030 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,992.73	6,092.84	-100.11	-1.64%	+10.9%
DS30	2,168.64	2,199.53	-30.89	-1.40%	+10.4%
DSES	1,287.43	1,301.86	-14.43	-1.11%	+3.6%
CDSET	1,210.66	1,226.92	-16.26	-1.33%	+7.8%

	Advanced	Declined	Unchanged	Total
All Category	54	306	12	372
A Category (Equity)	30	230	10	270
B Category (Equity)	12	46	1	59
N Category (Equity)	0	11	0	11
Z Category (Equity)	12	19	1	32
Mutual Funds	0	35	1	36
Corporate Bonds	1	1	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,042,524	5,106,388	-1.3%
	Mn USD	59,352	60,103	
Turnover	Mn BDT	17,402	15,980	+8.9%
	Mn USD	205	188	
Volume	Mn Shares	596	551	+8.1%
No. of Trade		275,884	254,961	+8.2%

Figure: Sectorial Turnover (BDT Mn)

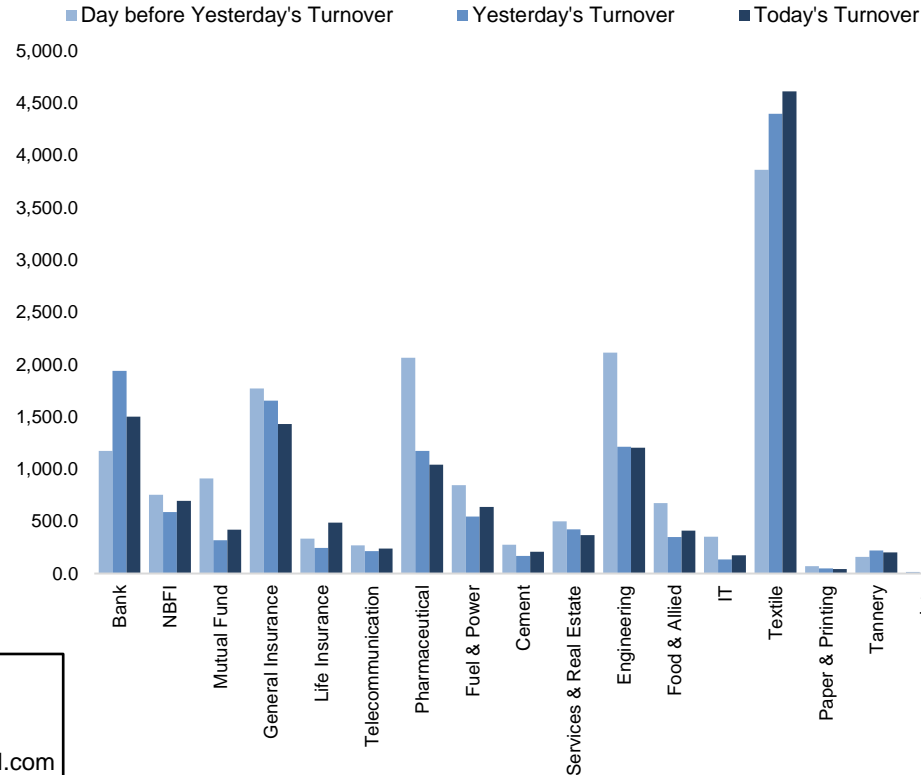
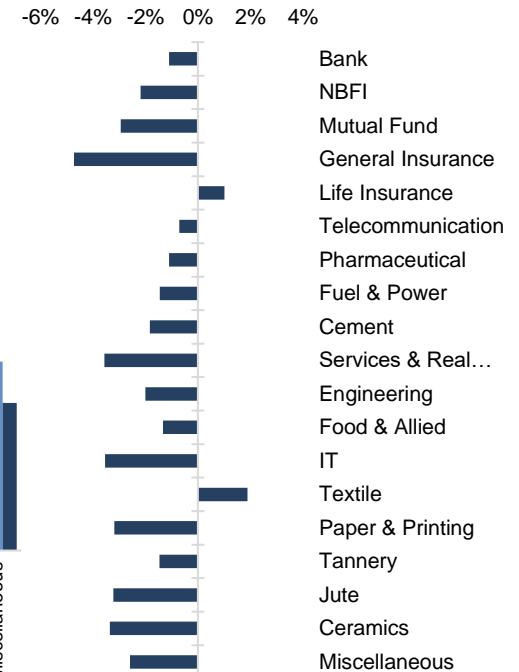


Figure: Sectorial Mcap Change



Market PE 18.9x  
Market PB 1.9x

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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	1,520	1,537	-16.86	-1.10%	31	656,868	14.7%	1,498.5	9.9%	8.7x	0.8x	GP	467,069	10.5%	59.8	13.2x	7.7x
NBFI	2,030	2,075	-45.27	-2.18%	23	199,393	4.5%	693.5	4.6%	43.4x	3.1x	WALTONHIL	395,291	8.9%	41.4	39.6x	6.9x
Mutual Fund	1,005	1,035	-30.48	-2.94%	37	45,344	1.0%	419.3	2.8%	NM	0.9x	BATBC	287,118	6.4%	172.7	24.5x	7.6x
General Insurance	5,300	5,562	-262.44	-4.72%	38	137,076	3.1%	1,430.0	9.4%	25.6x	2.6x	ROBI	226,279	5.1%	130.1	NM	3.4x
Life Insurance	2,588	2,563	+25.80	+1.01%	12	70,760	1.6%	486.0	3.2%	NM	NM	SQURPHARMA	188,903	4.2%	115.4	13.0x	2.2x
Telecommunication	6,140	6,184	-43.85	-0.71%	3	721,365	16.2%	237.7	1.6%	18.6x	5.3x	UPGDCL	158,837	3.6%	26.1	16.5x	5.2x
Pharmaceutical	3,419	3,457	-37.92	-1.10%	31	622,923	14.0%	1,041.8	6.9%	20.5x	2.5x	RENATA	126,692	2.8%	25.0	27.6x	5.2x
Fuel & Power	1,674	1,699	-24.70	-1.45%	22	447,776	10.0%	637.7	4.2%	12.2x	1.4x	ICB	87,673	2.0%	16.6	42.3x	2.0x
Cement	1,957	1,993	-36.40	-1.83%	7	114,894	2.6%	208.9	1.4%	20.1x	2.5x	BERGERPBL	81,718	1.8%	6.0	33.1x	8.4x
Services & Real Estate	1,047	1,086	-38.70	-3.56%	8	40,687	0.9%	366.1	2.4%	NM	0.9x	BEXIMCO	79,493	1.8%	1,030.3	21.9x	1.2x
Engineering	4,795	4,893	-97.94	-2.00%	42	585,288	13.1%	1,203.0	7.9%	29.1x	2.7x	BXPBARMA	76,821	1.7%	139.4	16.8x	2.2x
Food & Allied	20,976	21,259	-283.53	-1.33%	20	379,529	8.5%	409.9	2.7%	32.3x	8.0x	MARICO	69,026	1.5%	10.9	22.2x	42.2x
IT	2,599	2,694	-95.29	-3.54%	11	30,859	0.7%	173.5	1.1%	28.5x	2.2x	BRACBANK	67,520	1.5%	13.7	14.0x	1.3x
Textile	1,416	1,390	+26.25	+1.89%	58	149,585	3.4%	4,610.4	30.3%	NM	1.0x	LHBL	65,501	1.5%	90.9	22.8x	3.6x
Paper & Printing	4,877	5,037	-160.49	-3.19%	6	13,972	0.3%	44.0	0.3%	37.5x	0.9x	DUTCHBANGL	52,415	1.2%	389.3	9.3x	1.6x
Tannery	1,977	2,006	-29.33	-1.46%	6	21,575	0.5%	202.0	1.3%	NM	2.2x	SUMITPOWER	45,919	1.0%	83.8	8.2x	1.3x
Jute	7,662	7,917	-255.15	-3.22%	3	1,889	0.0%	10.4	0.1%	NM	13.7x	ISLAMIBANK	45,080	1.0%	7.0	9.3x	0.7x
Ceramics	508	525	-17.62	-3.35%	5	25,769	0.6%	112.9	0.7%	55.2x	1.7x	OLYMPIC	34,110	0.8%	6.7	16.5x	3.9x
Miscellaneous	3,843	3,945	-101.88	-2.58%	14	193,829	4.3%	1,411.2	9.3%	29.0x	1.9x	TITASGAS	33,930	0.8%	25.0	9.4x	0.5x
												UNILEVERCL	33,267	0.7%	2.0	70.5x	22.4x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONOSPOOL	142.1	+10.0%	3.6	NM	3.5x
MATINSPIINN	52.5	+9.8%	243.5	11.7x	1.1x
TAMIJTEX	33.6	+9.8%	0.0	NM	0.4x
PAPERPROC	44.9	+9.8%	0.0	NM	1.6x
MONNOFABR	28.1	+9.8%	18.6	NM	1.0x
SONARGAON	27.0	+9.8%	35.3	NM	1.2x
OAL	11.3	+9.7%	91.5	NM	0.8x
ARGONDENIM	28.3	+9.7%	323.4	32.9x	1.1x
ZAHEENSPIN	9.1	+9.6%	51.6	NM	1.0x
HWAWELLTEX	45.6	+9.6%	15.8	26.9x	1.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	123,599	7.7%	13.0x	2.2x
BATBC	75,943	4.8%	24.5x	7.6x
RENATA	61,851	3.9%	27.6x	5.2x
BEXIMCO	55,208	3.5%	21.9x	1.2x
BXPBARMA	53,636	3.4%	16.8x	2.2x
GP	46,707	2.9%	13.2x	7.7x
BRACBANK	36,299	2.3%	14.0x	1.3x
LHBL	23,135	1.4%	22.8x	3.6x
EBL	22,777	1.4%	7.1x	0.9x
ROBI	22,515	1.4%	NM	3.4x
ISLAMIBANK	21,945	1.4%	9.3x	0.7x
OLYMPIC	20,691	1.3%	16.5x	3.9x
BEACONPHAR	20,228	1.3%	28.6x	5.5x
CITYBANK	18,338	1.1%	5.9x	0.9x
PUBALIBANK	17,049	1.1%	6.7x	0.6x
NBL	16,930	1.1%	6.8x	0.5x
SUMITPOWER	16,893	1.1%	8.2x	1.3x
UPGDCL	15,884	1.0%	16.5x	5.2x
PRIMEBANK	15,397	1.0%	8.8x	0.8x
ALARABANK	13,681	0.9%	10.2x	1.0x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	88.5	-4.5%	1,030.3	21.9x	1.2x
DUTCHBANGL	95.3	+2.8%	389.3	9.3x	1.6x
MALEKSPIN	34.6	-0.3%	384.4	NM	0.8x
KTL	32.5	-1.8%	378.3	32.4x	1.9x
MAKSONSPIN	20.3	+1.0%	358.8	27.8x	1.1x
ARGONDENIM	28.3	+9.7%	323.4	32.9x	1.1x
QUEENSOUTH	35.0	+9.0%	316.9	58.5x	2.2x
DSSL	19.0	-0.5%	297.7	17.8x	1.1x
MATINSPIINN	52.5	+9.8%	243.5	11.7x	1.1x
LANKABAFIN	34.5	-2.3%	241.9	19.1x	1.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SEAPEARL	42.0	-9.9%	63.5	55.1x	3.7x
PIONEERINS	154.3	-9.6%	184.7	20.2x	3.0x
SONARBAINS	84.6	-9.3%	100.5	36.9x	4.0x
AGRANINS	55.9	-8.8%	36.5	34.2x	3.0x
STANCERAM	187.9	-8.7%	16.1	NM	21.2x
PRAGATIINS	101.1	-8.5%	47.6	26.4x	2.0x
SALAMCRST	30.9	-8.3%	27.8	52.4x	1.6x
GLOBALINS	58.1	-8.2%	29.8	37.5x	4.2x
SAFKOSPINN	27.0	-7.8%	58.6	NM	1.6x
CRYSTALINS	58.8	-7.7%	46.0	12.1x	2.7x

Block Trade (Top 35)	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
RENATA	1,310.0	1,305.0	446.3	341	2
EBL	34.3	32.2	437.4	12,754	4
SQURPHARMA	215.0	213.1	296.3	1,390	2
STANDARINS	80.0	78.7	202.9	2,579	5
BATBC	543.0	543.0	135.8	250	1
PRIMEBANK	23.0	23.0	115.0	5,000	2
FORTUNE	47.0	43.9	83.5	1,792	4
BDFINANCE	48.5	43.1	49.7	1,098	5
BEACONPHAR	131.0	130.0	47.3	363	5
AAMRANET	42.0	42.0	42.0	1,000	1

Block Trade (Top 35)	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity (‘000)	No. of Trade
SONALIPAPR	206.0	206.0	41.2	200	1
NRBCBANK	37.2	34.6	38.4	1,049	8
IFIC	12.8	12.8	32.0	2,500	1
PHOENIXFIN	32.4	31.9	25.3	785	3
BRACBANK	48.7	48.7	24.4	500	2
BEXIMCO	92.8	89.7	15.1	165	3
PIONEERINS	180.0	175.0	13.3	76	3
PTL	59.8	54.5	12.0	210	3
POPULARLIF	117.0	107.6	11.2	104	2
DACCADYE	17.4	17.0	11.2	645	6
AIL	41.2	40.3	10.7	264	2
MBL1STMF	9.3	8.6	10.0	1,150	2
UTTARABANK	23.1	23.1	8.1	352	1
CRYSTALINS	63.8	63.8	6.4	100	1
ROBI	46.8	44.0	6.3	138	2
GREENDELT	122.0	122.0	6.1	50	1
DUTCHBANGL	95.0	93.5	6.0	63	2
ORIONPHARM	58.5	58.5	5.9	100	1
RUPALIINS	42.3	42.3	5.7	134	1
MPETROLEUM	183.5	183.5	4.8	26	1
NHFIL	45.0	45.0	4.7	105	3
GENEXIL	94.1	94.0	4.5	48	2
NFML	41.5	41.5	4.2	100	1
MAKSONSPIN	21.1	21.1	3.7	177	1
OLYMPIC	171.0	171.0	3.4	20	2
<b>Total</b>			<b>2,204.5</b>		<b>115</b>

**Important DSE News**
**POPULARLIF**

(Q1 Un-audited): Decrease in life revenue account for Jan- March, 2021 was Tk. 261.93 million with total life insurance fund of Tk. 17,319.58 million as against increase in life revenue account of Tk. 151.09 million with total life insurance fund of Tk. 17,099.72 million respectively for the same period of the previous year.

**PIONEERINS**

The Board of Directors has recommended 20% cash and 10% stock dividend for the year ended on December 31, 2020. Date of AGM: 25.08.2021, Time: 11:00 AM, Venue: Digital Platform. Record Date: 18.07.2021. The Company has also reported EPS (after tax) of Tk. 7.61, NAV per share of Tk. 49.75 and NOCFPS of Tk. 5.82 for the year ended on December 31, 2020 as against Tk. 4.89, Tk. 44.09 and Tk. 5.48 respectively for the same period of the previous year. Disclosure on recommendation of Bonus share: i) Bonus share is to increase the Paid-up Capital of the Company which will strengthen its financial status both in Bangladesh and global Insurance market. ii) Bonus share is declared out of accumulated profit. iii) The bonus share is not declared from capital reserve or revaluation reserve or any unrealized gain or out of profit earned prior to incorporation of the Company and in no way the post dividend retained earnings become negative or a debit balance.

(Q1 Un-audited): EPS was Tk. 2.04 for January-March 2021 as against Tk. 2.03 for January-March 2020; NOCFPS was Tk. 1.14 for January-March 2021 as against Tk. 0.81 for January-March 2020. NAV per share was Tk. 51.47 as on March 31, 2021 and Tk. 49.75 as on December 31, 2020.

**PHOENIXFIN**

The Board of Directors has recommended 6% cash and 6% stock dividend for the year ended on December 31, 2020. Date of AGM: 30.09.2021, Time: 11:30 AM, Venue: Digital Platform. Record date: 29.07.2021. The Company has also reported EPS of Tk. 1.36, NAV per share of Tk. 22.01 and NOCFPS of Tk. 5.25 for the year ended on December 31, 2020 as against Tk. 1.79, Tk. 21.23 and Tk. 7.11 respectively for the same period of the previous year. Disclosure on recommendation of stock dividend: i) Stock dividend has been recommended in view to utilize its retained amount as paid-up capital for improving the capital adequacy and thereby facilitate future business expansion of the Company. ii) Stock dividend is declared out of accumulated profit. iii) Stock dividend is not declared from capital reserve or revaluation reserve or any unrealized gain or out of profit earned prior to incorporation of the Company or through reducing paid up capital or through doing anything so that the post- dividend retained earnings become negative or a debit balance.

(Q1 Un-audited): EPS was Tk. 0.45 for January-March 2021 as against Tk. 0.36 for January-March 2020. NOCFPS was Tk. 0.94 for January-March 2021 as against Tk. 1.26 for January-March 2020. NAV per share was Tk. 22.46 as on March 31, 2021 and Tk. 22.01 as on December 31, 2020.

**RINGSHINE**

Press Release of BSEC; dated June 24, 2021: 1) Ring Shine Textiles Limited has raised its paid-up capital from Tk. 9.95 crore to Tk. 285.05 crore through issuance of ordinary shares totaling Tk. 275.10 crore under private offer to existing Sponsors/Directors and external 73 local shareholders. The 11 Sponsors/Directors and 33 external local shareholders did not pay any amount against the allotment of aforesaid shares; 2) The published audited financial statements for the year ended on 30 June 2017 to 30 June 2020 do not reflect the true & fair view of the company's actual financial performance; 3) The Commission is taking legal measures against the respective parties for violating the relevant provisions of securities laws and anti-money laundering laws; 4) Ring Shine Textiles Limited (RSTL) is now in operation and improving its capacity.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
AMBEEPHA	-	0.0%	15.0%	Record Date	28-Jun-21
PHENIXINS	-	0.0%	15.0%	Record Date	30-Jun-21
PRAGATIINS	-	0.0%	30.0%	Record Date	30-Jun-21
UCB	-	5.0%	5.0%	Record Date	30-Jun-21
DHAKAINS	-	0.0%	20.0%	Record Date	04-Jul-21

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