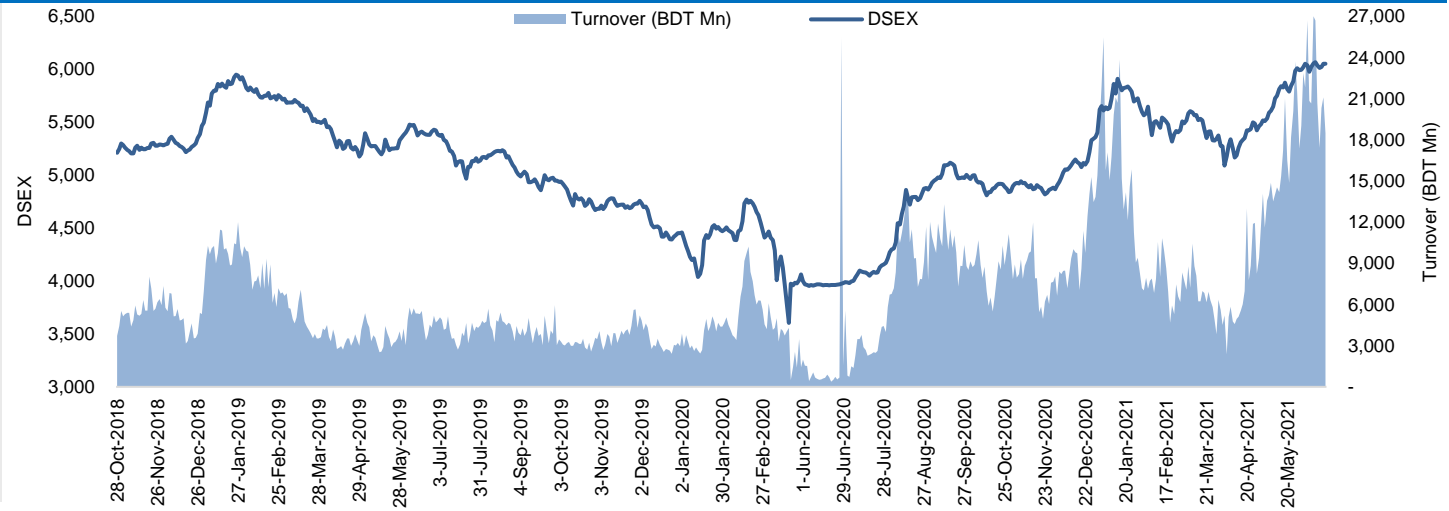


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.02%) gained 1.02 points and closed at 6,052.76. The blue-chip index DS30 (+0.63%), the Shariah-based index DSES (+0.18%), and the large-cap index CDSET (+0.69%) closed at 2,197.06, 1,290.93, and 1,224.99 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 1.38% followed by Food & Allied (+0.41%), Pharmaceutical (+0.23%), Telecommunication (+0.18%). NBF1 experienced the highest loss of 1.1% followed by Engineering (-1.05%), Bank (-0.24%). Block trades contributed 3.3% of the overall market turnover. Bangladesh Export Import Company Ltd. (+3.4%) was the most traded share with a turnover of BDT 2,140 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,052.76	6,051.74	+1.02	+0.02%	+12.0%
DS30	2,197.06	2,183.27	+13.80	+0.63%	+11.9%
DSES	1,290.93	1,288.67	+2.27	+0.18%	+3.9%
CDSET	1,224.99	1,216.62	+8.37	+0.69%	+9.1%

	Advanced	Declined	Unchanged	Total
All Category	107	237	28	372
A Category (Equity)	79	169	22	270
B Category (Equity)	9	46	4	59
N Category (Equity)	0	11	0	11
Z Category (Equity)	19	11	2	32
Mutual Funds	7	22	7	36
Corporate Bonds	1	1	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,081,348	5,083,161	-0.0%
	Mn USD	59,809	59,830	-0.0%
Turnover	Mn BDT	18,472	21,097	-12.4%
	Mn USD	217	248	-12.4%
Volume	Mn Shares	485	574	-15.5%
No. of Trade		269,745	306,707	-12.1%

Figure: Sectorial Turnover (BDT Mn)

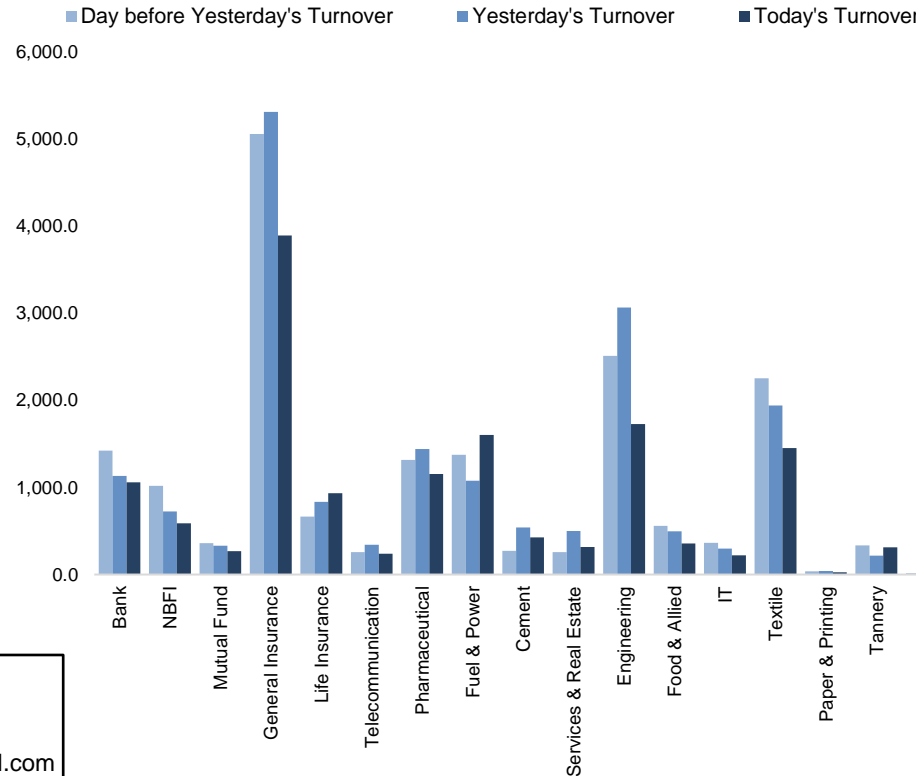
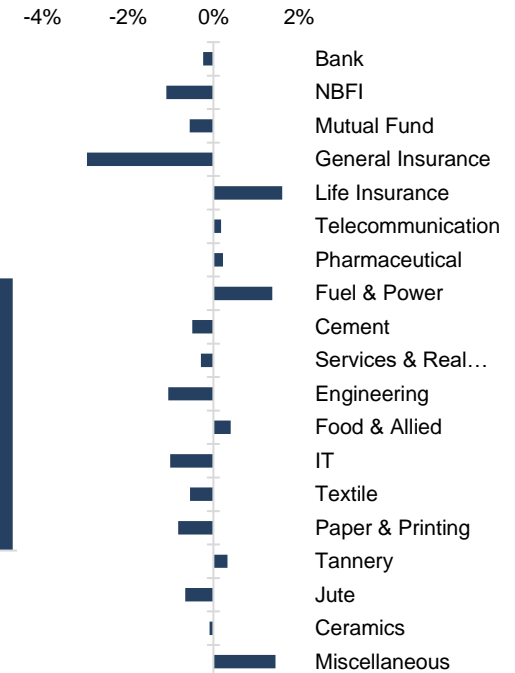


Figure: Sectorial Mcap Change



Market PE 19.0x
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	1,480	1,484	-3.50	-0.24%	31	639,497	14.2%	1,056.6	5.9%	8.4x	0.8x	GP	464,638	10.3%	13.1	13.1x	7.6x
NBFI	2,050	2,073	-22.82	-1.10%	23	201,380	4.5%	588.7	3.3%	43.5x	3.2x	WALTONHIL	406,106	9.0%	26.8	40.7x	7.1x
Mutual Fund	1,007	1,012	-5.58	-0.55%	37	45,439	1.0%	267.9	1.5%	NM	0.9x	BATBC	287,874	6.4%	96.4	24.6x	7.6x
General Insurance	6,034	6,218	-183.77	-2.96%	38	156,056	3.5%	3,888.2	21.8%	29.2x	2.9x	ROBI	230,469	5.1%	119.6	NM	3.5x
Life Insurance	2,733	2,690	+43.24	+1.61%	12	74,727	1.7%	931.2	5.2%	NM	NM	SQURPHARMA	189,523	4.2%	89.8	13.1x	2.2x
Telecommunication	6,160	6,149	+10.94	+0.18%	3	723,669	16.1%	238.4	1.3%	18.6x	5.4x	UPGDCL	159,996	3.6%	48.9	16.6x	5.3x
Pharmaceutical	3,411	3,404	+7.77	+0.23%	31	621,525	13.8%	1,152.1	6.5%	20.4x	2.5x	RENATA	125,923	2.8%	90.3	27.4x	5.2x
Fuel & Power	1,717	1,693	+23.29	+1.38%	22	459,067	10.2%	1,600.5	9.0%	12.5x	1.4x	ICB	88,156	2.0%	16.4	42.6x	2.0x
Cement	2,014	2,023	-9.98	-0.49%	7	118,217	2.6%	425.1	2.4%	20.7x	2.5x	BEXIMCO	87,847	2.0%	2,139.9	24.2x	1.3x
Services & Real Estate	1,102	1,105	-3.19	-0.29%	8	42,803	1.0%	314.7	1.8%	NM	0.9x	BERGERPBL	82,098	1.8%	11.0	33.2x	8.4x
Engineering	4,946	4,998	-52.73	-1.05%	42	603,728	13.4%	1,727.3	9.7%	30.0x	2.8x	BXPBARMA	78,025	1.7%	105.0	17.1x	2.2x
Food & Allied	21,022	20,937	+85.25	+0.41%	20	380,363	8.5%	357.2	2.0%	32.4x	8.0x	MARICO	67,561	1.5%	12.5	21.7x	41.3x
IT	2,704	2,731	-27.53	-1.01%	11	32,104	0.7%	222.0	1.2%	29.7x	2.3x	LHBL	67,011	1.5%	92.7	23.4x	3.7x
Textile	1,251	1,258	-6.90	-0.55%	58	132,187	2.9%	1,452.6	8.1%	NM	0.9x	BRACBANK	66,824	1.5%	65.0	13.8x	1.3x
Paper & Printing	5,001	5,043	-41.33	-0.82%	6	14,328	0.3%	26.0	0.1%	38.5x	1.0x	SUMITPOWER	47,307	1.1%	294.2	8.4x	1.3x
Tannery	1,969	1,962	+6.46	+0.33%	6	21,487	0.5%	310.4	1.7%	NM	2.2x	ISLAMIBANK	44,919	1.0%	10.0	9.3x	0.7x
Jute	7,890	7,943	-52.34	-0.66%	3	1,946	0.0%	8.8	0.0%	NM	14.1x	DUTCHBANGL	43,835	1.0%	85.3	7.8x	1.3x
Ceramics	530	530	-0.47	-0.09%	5	26,895	0.6%	171.9	1.0%	57.6x	1.8x	TITASGAS	35,414	0.8%	62.4	9.8x	0.5x
Miscellaneous	4,043	3,985	+57.94	+1.45%	14	203,949	4.5%	3,120.6	17.5%	30.7x	2.0x	OLYMPIC	34,549	0.8%	26.8	16.7x	3.9x
												UNILEVERCL	33,190	0.7%	1.9	70.3x	22.4x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONOSPOOL	80.4	+10.0%	0.0	NM	2.0x
PAPERPROC	25.6	+9.9%	0.0	64.0x	0.9x
TAMIJTEX	19.1	+9.8%	0.0	63.7x	0.2x
SAFKOSPINN	24.9	+9.7%	117.3	NM	1.5x
MONNOFABR	16.0	+9.6%	0.2	NM	0.6x
BSC	47.1	+9.3%	150.4	28.7x	0.8x
CNATEX	3.8	+8.6%	11.8	NM	0.3x
NFML	38.1	+7.6%	502.9	29.5x	2.9x
DELTALIFE	112.1	+5.8%	85.4	NM	NM
POWERGRID	47.1	+5.6%	276.3	10.0x	0.4x

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	76,143	4.7%	24.6x	7.6x
RENATA	61,475	3.8%	27.4x	5.2x
BEXIMCO	61,009	3.8%	24.2x	1.3x
BXPBARMA	54,477	3.4%	17.1x	2.2x
GP	46,464	2.9%	13.1x	7.6x
BRACBANK	35,925	2.2%	13.8x	1.3x
LHBL	23,668	1.5%	23.4x	3.7x
ROBI	22,932	1.4%	NM	3.5x
EBL	22,644	1.4%	7.1x	0.9x
ISLAMIBANK	21,867	1.4%	9.3x	0.7x
OLYMPIC	20,958	1.3%	16.7x	3.9x
BEACONPHAR	18,837	1.2%	26.7x	5.1x
CITYBANK	17,908	1.1%	5.7x	0.9x
SUMITPOWER	17,404	1.1%	8.4x	1.3x
PUBALIBANK	17,119	1.1%	6.8x	0.6x
NBL	16,295	1.0%	6.6x	0.4x
UPGDCL	16,000	1.0%	16.6x	5.3x
PRIMEBANK	14,776	0.9%	8.5x	0.8x
ALARABANK	13,309	0.8%	10.0x	1.0x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	97.8	+3.4%	2,139.9	24.2x	1.3x
NFML	38.1	+7.6%	502.9	29.5x	2.9x
PIONEERINS	201.0	-1.5%	500.5	27.1x	4.2x
ORIONPHARM	56.7	-0.9%	354.4	20.8x	0.8x
NPOLYMAR	59.9	-2.0%	325.8	19.9x	1.6x
FORTUNE	43.8	+1.4%	295.7	36.4x	3.2x
SUMITPOWER	44.3	+3.7%	294.2	8.4x	1.3x
CONFIDCEM	139.9	-	276.4	8.8x	1.9x
POWERGRID	47.1	+5.6%	276.3	10.0x	0.4x
BBSCABLES	66.3	-0.7%	273.1	15.7x	2.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
INDEXAGRO	113.6	-9.0%	156.7	78.3x	2.0x
RELIANCINS	121.6	-7.6%	124.2	22.8x	2.0x
RUNNERAUTO	64.9	-6.6%	53.1	41.3x	1.0x
PROVATIINS	189.2	-5.9%	4.6	56.8x	8.5x
CRYSTALINS	67.8	-5.8%	89.3	14.0x	3.2x
GREENDELTA	135.7	-5.8%	164.7	16.9x	2.0x
LRBDL	50.8	-5.8%	228.0	35.8x	1.5x
MIRAKHTER	91.4	-5.3%	109.8	24.5x	1.8x
KEYACOSMET	7.2	-5.3%	111.5	NM	0.6x
INTRACO	19.9	-5.2%	62.3	43.2x	1.7x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
IFIC	12.1	12.1	242.0	20,000	1
GENEXIL	95.0	91.9	95.7	1,019	6
BSCCL	185.0	185.0	86.7	469	1
MTB	21.4	21.4	40.7	1,900	1
SIBL	12.8	12.8	28.1	2,198	1
NFML	36.5	34.0	22.7	665	8
INTRACO	22.8	22.8	20.0	875	2
BATBC	535.0	535.0	16.0	30	1
DACCADYE	17.0	17.0	6.9	405	2
SKTRIMS	51.2	51.2	6.2	120	2

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
NRBCBANK	36.5	35.5	4.3	120	3
NPOLYMAR	63.4	63.4	3.2	51	2
BGIC	57.0	57.0	3.1	54	1
LRBDL	57.0	56.5	2.5	45	3
INDEXAGRO	120.0	120.0	2.4	20	1
BDFINANCE	45.5	45.5	2.2	48	1
SALAMCRST	34.7	33.8	2.1	62	2
KTL	24.8	24.6	2.0	81	2
STANCERAM	252.0	252.0	1.8	7	1
PREMIERLEA	8.9	8.9	1.8	200	1
RUPALIBANK	37.1	37.1	1.6	43	1
BEACONPHAR	125.9	125.9	1.3	11	1
DOREENPWR	65.0	65.0	1.3	20	1
PRAGATIINS	130.0	130.0	1.3	10	1
MAKSONSPIN	18.4	18.4	1.1	60	1
SONARBAINS	110.0	110.0	1.1	10	1
PTL	54.4	54.4	1.1	20	1
SAFKOSPINN	24.9	24.9	1.1	42	1
CAPMIBLMF	22.2	22.2	1.0	43	1
BEXIMCO	95.0	95.0	1.0	10	1
GLOBALINS	74.0	74.0	0.8	11	1
BERGERPBL	1,751.1	1,751.1	0.8		1
CONFIDCEM	150.0	150.0	0.8	5	1
GREENDELTA	150.0	150.0	0.8	5	1
EGEN	53.7	53.7	0.7	14	1
SAIFPOWER	25.5	25.5	0.7	28	1
SAIHAMCOT	20.0	20.0	0.7	35	1
Total			611.2		66

Important DSE News
MERCANBANK

Refer to their earlier news disseminated by DSE on 28.04.2021 regarding issuance of Perpetual Bond, the Company has further informed that the Board of Directors has decided to issue 'Mercantile Bank Perpetual Bond' of Tk. 700.00 crore in the following manner to comply with Bangladesh Securities and Exchange Commission (Debt Securities) Rules, 2021 and Directive issued on 23 May 2021: Tk. 630.00 crore (90%) through Private Placement and Tk. 70.00 crore (10%) through Public Offer instead of previously decided 100% private placement of Tk. 700.00 crore, Contingent-Convertible BASEL III compliant Mercantile Bank Perpetual Bond as part of Additional Tier- I Capital subject to the approval from Regulatory Authorities as well as approval of the Shareholders of the Company.

SAIHAMTEX

National Credit Ratings Limited (NCR) has announced the Surveillance Entity Rating of the Company as "AA" in the long term and "ST-2" in the short term along with a developing outlook based on audited financial statements of the Company as on June 30, 2020.

STANDARINS

Mr. Hasib Mosharraf, one of the Directors of the Company, has expressed his intention to buy 6,04,000 shares of the Company at prevailing market price (In the Block Market) through Stock Exchange (DSE) within next 30 working days. Mr. Nahyan Haroon, one of the Directors of the Company, has expressed his intention to sell 5,50,500 shares out of his total holding of 2,19,85,463 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

EXCH

Commencement of subscription of South Bangla Agriculture & Commerce Bank Limited by General Public and upload the IPO file and deposit the full subscription amount of General Public in the ESS by TREC Holders of DSE & CSE and Merchant Bankers: The subscription for shares of South Bangla Agriculture & Commerce Bank Limited will be started from July 05, 2021 and continued till July 11, 2021. Minimum required investment for General Public (RB, NRB and ASI) will be BDT 20,000 (twenty thousand only) (Continuation of DSENEWS): as on June 24, 2021 (day-end) in matured listed securities at market price (between the close price of both Exchanges whichever is higher) which is in accordance with the BSEC consent letter to South Bangla Agriculture & Commerce Bank Limited (Ref: BSEC/CI/IPO-313/2021/407 dated June 01, 2021). Minimum and maximum amount allowed for subscription for General Public would be BDT 10,000 (or its multiples) and 50,000 respectively. (Continuation of DSENEWS): The registered TREC Holders/ merchant bankers have to upload the IPO file of General Public in the Electronic Subscription System (ESS) from 10:00 AM of July 12, 2021 to 5:00 PM of July 14, 2021 and make the full payment to DSE through Mercantile Bank Limited (A/C Name: Dhaka Stock Exchange Limited, A/C No.: 135413134079404) from July 12, 2021 to July 14, 2021 (during banking hour) (Continuation of DSENEWS): from their consolidated customers' Account based on total submitted application. Exchanges shall send the list of BO accounts who have applied in the IPO to the CDBL and CDBL shall verify the list of BO accounts provided by the Exchanges regarding investment of general applicants in listed securities. Please visit the following website for subscription related updates: <https://www.essbangladesh.com>.

AMBEEPHA

The auditor of the Ambee Pharmaceuticals Ltd has given the "Qualified Opinion" & "Emphasis of Matter" paragraphs in the Auditor's Report for the year ended on 30 June 2020. Basis for Qualified Opinion: The Company has not disclosed BDT 18,000,000 as VAT payable in their VAT return. Emphasis of matter: Due to some unavoidable circumstances, AGM of the company could not be held in time and accordingly, the company filed an application to the Hon'ble High Court for condonation of default for not holding the AGM in time. On hearing the petition, the Hon'ble High Court in its' verdict has accepted the condonation petition and directed the company to hold the AGM within eight weeks on receipt of the copy of verdict. However, the company received the verdict on 01-06-2021.

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
NORTHRNIINS	-	0.0%	10.0%	Record Date	23-Jun-21
REPUBLIC	-	7.0%	7.0%	Record Date	24-Jun-21

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PRAGATIINS

The auditor of the Pragati Insurance Ltd. has given the "Qualified Opinion" paragraphs in the Auditor's Report for the year ended on 31 December 2020. Basis for Qualified Opinion: 1. Gratuity provision: As disclosed in Note # 2.06 (k) (ii) the company has a funded Gratuity Scheme for all eligible employees who have completed minimum 5 years of confirmed service with the company. As per Note # 26.00 the company reported an amount of Tk. 10,030,031 as Provision for Gratuity, as at 31/12/2020 whereas the balance as at 31/12/2019 was Tk. 2,530,031. The amount of Tk. 10,030,031 has been calculated for the employees who have left the company during the year after completing minimum five years' service. No provision has been made for the employees who have completed 5 years' service and continuing with the company. As a result, the provision for gratuity and expenses has been understated, and EPS has been overstated. 2. Compliance with IDRA Regulation: The company has not made proper investment in designated instruments in the manner as prescribed in SRO No. 353-1aw/2019 dated 11 November 2019 issued by IDRA. As well as the company has not submitted the report on category of investment in assets in the prescribed manner as prescribed in Schedule # 1 of the said SRO.

PREMIERBAN

Mr. Nahyan Haroon, one of the Directors of the Company, has expressed his intention to sell 5,50,500 shares out of his total holding of 2,19,85,463 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

Mr. Yeh Cheng Min, one of the Sponsor Directors of the Company, has expressed his intention to sell 32,03,442 shares out of his total holding of 3,13,23,385 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

BXSYNTH

BSEC News: Referring to the earlier news disseminated on 03.06.2021 regarding Suspension of trading of the shares of BXSYNTH as per BSEC Directive, the trading of the shares has been further suspended for 15 days effective from June 20, 2021 as per BSEC Directive No. BSEC/SRMIC/174-2020/52 dated September 07, 2020 under Section 9(7) of the Securities and Exchange Ordinance, 1969 (Ordinance No. XVII of 1969) subject to the compliance of Section 9(8) of this Ordinance.

EASTRN LUB

The Company has informed that Mr. A B M Azad ndc, Chairman, BPC (Secretary to Govt.) has been appointed as Chairman of the Board of Directors of the Company with effect from June 07, 2021.

IFADAUTOS

The Company has informed that Bangladesh Economic Zones Authority (BEZA) has allotted 30 acres of land in favor of IFAD Autos Limited to develop and operate industries, run commercial activities and to construct onsite infrastructures at Bangabandhu Sheikh Mujib Shilpa Nagar, at Mirsarai-Feni Economic Zones. Furthermore, the land is being allotted on lease for 50 years on a rental basis. The Company will disclose all information immediately after making Deed with Bangladesh Economic Zones Authority.

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