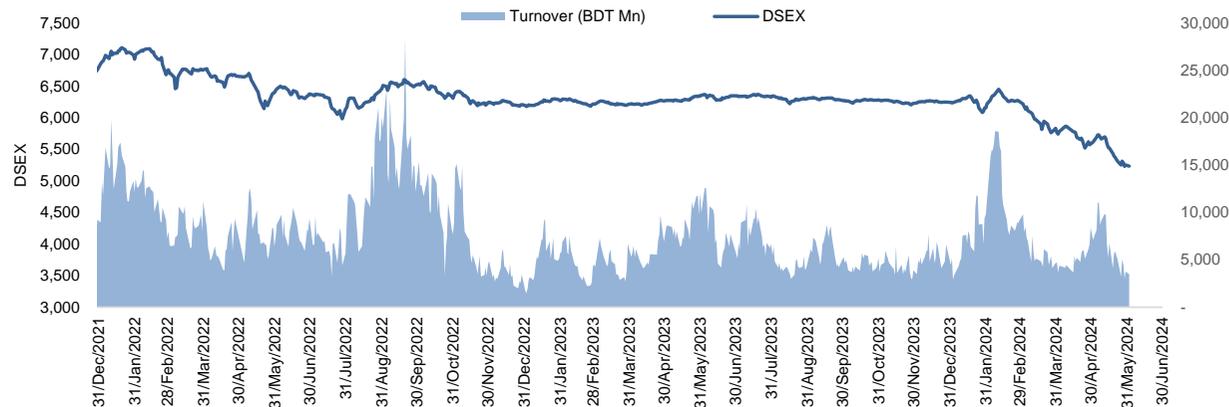


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.35%) lost 18.3 points and closed at 5,233.67. The blue-chip index DS30 (-0.42%), the Shariah-based index DSES (-0.56%), and the large-cap index CDSET (-0.37%) closed at 1,867.05, 1,137.26, and 1,005.00 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.64% followed by NBF1 (-0.64%), Fuel & Power (-0.52%), Engineering (-0.38%), Bank (-0.24%), Food & Allied (-0.24%), and Telecommunication (+0.32%), respectively. Block trades contributed 7.8% of the overall market turnover. Beach Hatchery Ltd. (+4.7%) was the most traded share with a turnover of BDT 139 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX | 5,233.67 | 5,251.96 | -18.30 | -0.35% | -16.2% |
| DS30 | 1,867.05 | 1,874.84 | -7.79 | -0.42% | -10.8% |
| DSES | 1,137.26 | 1,143.70 | -6.44 | -0.56% | -16.6% |
| CDSET | 1,005.00 | 1,008.71 | -3.71 | -0.37% | -16.4% |

Figure: Sectorial Turnover (BDT Mn)

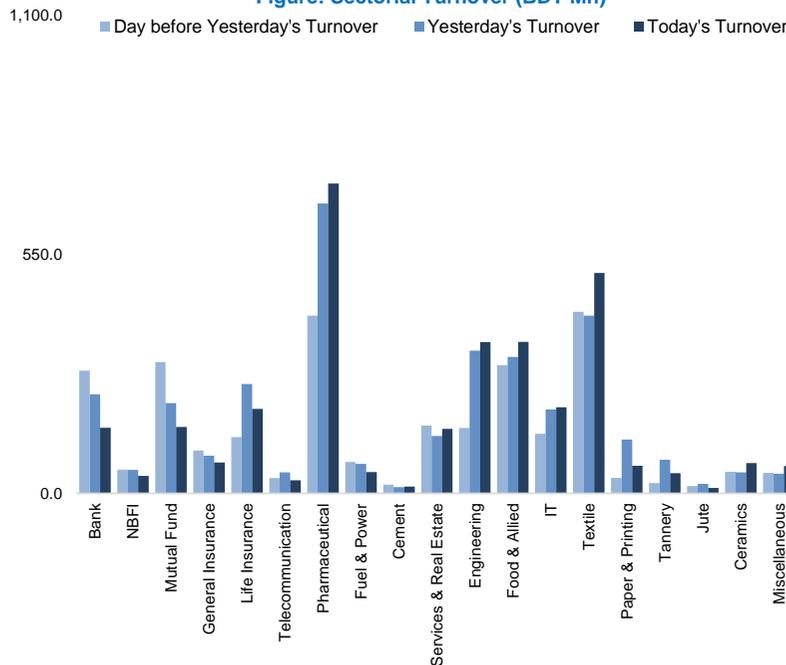
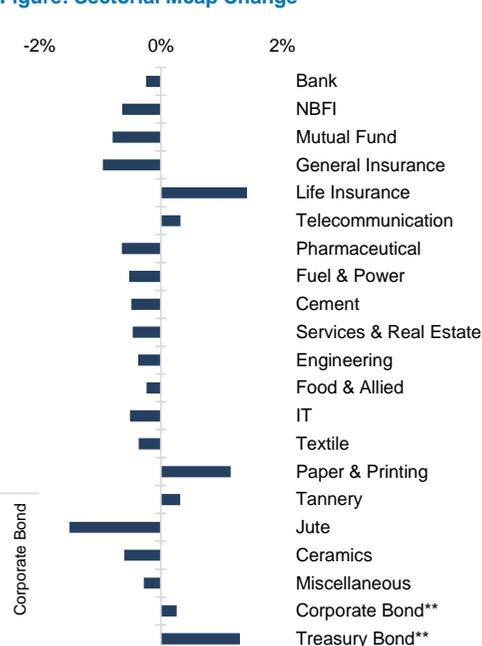


Figure: Sectorial Mcap Change



| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 124 | 219 | 48 | 391 |
| A Category (Equity) | 65 | 147 | 20 | 232 |
| B Category (Equity) | 39 | 48 | 16 | 103 |
| N Category (Equity) | 1 | 2 | 0 | 3 |
| Z Category (Equity) | 19 | 22 | 12 | 53 |
| Mutual Funds | 6 | 23 | 8 | 37 |
| Corporate Bonds | 0 | 2 | 0 | 2 |
| Treasury Bonds | 1 | 0 | 0 | 1 |

| | Today | Last Day | Daily %Δ | |
|----------|--------------|-----------|-----------|--------|
| Mcap | Mn BDT | 6,478,982 | 6,489,221 | -0.2% |
| | Mn USD | 54,948 | 55,035 | |
| Turnover | Mn BDT | 3,495 | 3,745 | -6.7% |
| | Mn USD | 30 | 32 | |
| Volume | Mn Shares | 120 | 121 | -0.6% |
| | No. of Trade | 121,661 | 108,856 | +11.8% |

* Based on Traded Scrips

| | |
|---|---|
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|---|---|

Market PE 13.5x
Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and 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 | 1,301 | 1,305 | -3.19 | -0.24% | 36 | 622,398 | 9.6% | 151.0 | 4.7% | 7.2x | 0.6x | GP | 304,358 | 8.7% | 12.3 | 7.9x | 3.8x |
| NBFI | 1,085 | 1,092 | -6.97 | -0.64% | 23 | 105,027 | 1.6% | 40.2 | 1.2% | NM | NM | SQRPHARMA | 182,609 | 5.2% | 41.1 | 9.0x | 1.5x |
| Mutual Fund | 690 | 696 | -5.54 | -0.80% | 37 | 32,242 | 0.5% | 152.8 | 4.7% | NM | 0.6x | BATBC | 178,146 | 5.1% | 24.1 | 10.2x | 3.4x |
| General Insurance | 2,914 | 2,942 | -28.18 | -0.96% | 43 | 84,404 | 1.3% | 70.7 | 2.2% | 15.3x | 1.3x | WALTONHIL | 154,827 | 4.4% | 5.3 | 12.0x | 1.4x |
| Life Insurance | 2,029 | 2,000 | +28.45 | +1.42% | 15 | 53,933 | 0.8% | 194.3 | 6.0% | NM | NM | ROBI | 115,758 | 3.3% | 15.2 | 30.3x | 1.7x |
| Telecommunication | 3,775 | 3,763 | +12.11 | +0.32% | 3 | 437,101 | 6.7% | 30.2 | 0.9% | 9.8x | 2.7x | BEXIMCO | 103,842 | 3.0% | 0.1 | NM | 1.2x |
| Pharmaceutical | 3,005 | 3,024 | -19.50 | -0.64% | 33 | 573,563 | 8.9% | 712.2 | 22.1% | 15.5x | 1.7x | BERGERPBL | 77,279 | 2.2% | 0.9 | 23.8x | 5.8x |
| Fuel & Power | 1,191 | 1,197 | -6.26 | -0.52% | 23 | 313,532 | 4.8% | 48.9 | 1.5% | 20.5x | 0.7x | RENATA | 73,234 | 2.1% | 3.0 | 31.9x | 2.3x |
| Cement | 2,142 | 2,153 | -10.48 | -0.49% | 7 | 102,301 | 1.6% | 15.7 | 0.5% | 14.8x | 2.0x | UPGDCL | 73,042 | 2.1% | 2.3 | 9.7x | 2.2x |
| Services & Real Estate | 1,560 | 1,567 | -7.26 | -0.46% | 9 | 86,249 | 1.3% | 148.2 | 4.6% | 27.0x | 0.6x | LHBL | 67,476 | 1.9% | 7.5 | 11.9x | 2.8x |
| Engineering | 2,713 | 2,724 | -10.24 | -0.38% | 42 | 313,497 | 4.8% | 347.6 | 10.8% | 13.1x | 1.0x | BRACBANK | 61,232 | 1.7% | 7.6 | 6.9x | 0.9x |
| Food & Allied | 15,424 | 15,461 | -36.52 | -0.24% | 21 | 283,181 | 4.4% | 348.3 | 10.8% | 15.1x | 4.8x | ISLAMIBANK | 52,486 | 1.5% | 0.1 | 8.3x | 0.7x |
| IT | 2,435 | 2,448 | -12.48 | -0.51% | 11 | 32,039 | 0.5% | 198.3 | 6.2% | 26.4x | 2.1x | BXPBARMA | 48,403 | 1.4% | 4.8 | 9.1x | 1.0x |
| Textile | 1,234 | 1,238 | -4.53 | -0.37% | 58 | 127,984 | 2.0% | 507.1 | 15.7% | 93.7x | 0.9x | ICB | 44,490 | 1.3% | 2.4 | NM | 1.1x |
| Paper & Printing | 6,860 | 6,782 | +78.12 | +1.15% | 6 | 31,472 | 0.5% | 63.2 | 2.0% | 48.6x | 1.5x | DUTCHBANGL | 42,183 | 1.2% | 0.8 | 5.2x | 0.9x |
| Tannery | 2,309 | 2,302 | +7.37 | +0.32% | 6 | 25,294 | 0.4% | 46.7 | 1.4% | 36.4x | 2.4x | POWERGRID | 39,294 | 1.1% | 1.9 | NM | 0.2x |
| Jute | 15,490 | 15,727 | -237.37 | -1.51% | 3 | 3,630 | 0.1% | 12.7 | 0.4% | NM | NM | UNILEVERCL | 38,595 | 1.1% | 0.9 | 44.7x | 15.0x |
| Ceramics | 502 | 505 | -3.04 | -0.60% | 5 | 22,289 | 0.3% | 69.6 | 2.2% | 43.5x | 1.4x | BESTHLDNG | 34,743 | 1.0% | 51.9 | 25.2x | 0.6x |
| Miscellaneous | 4,198 | 4,209 | -11.88 | -0.28% | 15 | 228,717 | 3.5% | 62.6 | 1.9% | 38.6x | 1.8x | EBL | 34,633 | 1.0% | 8.5 | 5.3x | 0.8x |
| Corporate Bond** | 5,610 | 5,595 | +14.59 | +0.26% | 16 | 43,037 | 0.7% | 0.1 | 0.0% | NM | NM | BEACONPHAR | 31,809 | 0.9% | 20.4 | 70.6x | 5.2x |
| Treasury Bond** | 130 | 128 | +1.67 | +1.30% | 241 | 2,956,666 | 45.6% | 0.3 | 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 |
|-----------------|-------------------|-------|-------------------|-------|------|----------------------------|--------------------------|----------------------------|-------|------|-------------------|-------------------|-------|-------------------|-------|-------|
| GHCL | 34.5 | +9.9% | 11.9 | NM | 0.8x | SQRPHARMA | 121,789 | 7.0% | 9.0x | 1.5x | BEACHHATCH | 78.2 | +4.7% | 138.6 | 40.5x | 6.3x |
| CENTRALPHL | 18.1 | +9.7% | 86.0 | NM | 2.5x | BATBC | 74,086 | 4.3% | 10.2x | 3.4x | ASIATICLAB | 53.2 | -2.9% | 123.7 | NM | 1.1x |
| AFCAGRO | 14.9 | +8.0% | 10.9 | NM | 0.8x | BEXIMCO | 69,196 | 4.0% | NM | 1.2x | AIL | 134.1 | -1.1% | 118.0 | 54.3x | 5.6x |
| MEGHNACEM | 80.7 | +7.9% | 2.3 | NM | 1.8x | RENATA | 68,042 | 3.9% | 31.9x | 2.3x | ORIONPHARM | 71.3 | -2.3% | 104.7 | 16.2x | 0.8x |
| TILIL | 45.8 | +7.8% | 7.5 | NM | NM | BXPBARMA | 45,564 | 2.6% | 9.1x | 1.0x | EGEN | 38.5 | -2.8% | 101.0 | 26.2x | 1.7x |
| RUPALILIFE | 166.5 | +7.1% | 79.6 | NM | NM | GP | 38,700 | 2.2% | 7.9x | 3.8x | ORIONINFU | 555.0 | -3.0% | 92.1 | NM | 37.2x |
| YPL | 22.3 | +5.2% | 15.0 | NM | 4x | BEACONPHAR | 34,036 | 2.0% | 70.6x | 5.2x | GOLDENSON | 20.4 | +2.0% | 89.9 | NM | 1.1x |
| ETL | 10.8 | +4.9% | 20.2 | 26.5x | 0.9x | ISLAMIBANK | 33,649 | 1.9% | 8.3x | 0.7x | FEKDIL | 18.4 | +4.5% | 89.4 | 11.8x | 0.9x |
| BEACHHATCH | 78.2 | +4.7% | 138.6 | 40.5x | 6.3x | BRACBANK | 30,964 | 1.8% | 6.9x | 0.9x | CENTRALPHL | 18.1 | +9.7% | 86.0 | NM | 2.5x |
| REGENTTEX | 4.5 | +4.7% | 0.3 | NM | 0.2x | LHBL | 28,853 | 1.7% | 11.9x | 2.8x | RUPALILIFE | 166.5 | +7.1% | 79.6 | NM | NM |

| Top Ten Losers | 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 | Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|----------------|-------------------|-------|-------------------|-------|-------|----------------------------|--------------------------|----------------------------|-------|------|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| HAMI | 149.0 | -3.5% | 6.6 | NM | 16.4x | PUBALIBANK | 18,457 | 1.1% | 4.0x | 0.6x | BEACHHATCH | 76.0 | 72.5 | 18.0 | 1,258 | 91.47 |
| KBPPWBIL | 158.5 | -3.0% | 0.1 | NM | 13x | CITYBANK | 18,190 | 1.0% | 3.7x | 0.6x | SAMORITA | 67.7 | 67.1 | 4.0 | 567 | 38.38 |
| KOHINOOR | 641.2 | -3.0% | 19.8 | 56.6x | 11.1x | OLYMPIC | 16,818 | 1.0% | 15.7x | 2.5x | WALTONHIL | 513.0 | 513.0 | 1.0 | 40 | 20.52 |
| KPPL | 22.7 | -3.0% | 26.3 | NM | NM | ROBI | 15,714 | 0.9% | 30.3x | 1.7x | BSRMLTD | 90.0 | 90.0 | 1.0 | 218 | 19.62 |
| ORIONINFU | 555.0 | -3.0% | 92.1 | NM | 37.2x | BSRMLTD | 14,210 | 0.8% | 4.6x | 0.6x | RUPALILIFE | 160.0 | 152.1 | 3.0 | 121 | 19.22 |
| PRIME1CBA | 6.5 | -3.0% | 9.9 | NM | 1.1x | BESTHLDNG | 14,098 | 0.8% | 25.2x | 0.6x | AIL | 132.0 | 131.6 | 5.0 | 91 | 12.05 |
| BEACONPHAR | 137.7 | -3.0% | 20.4 | 70.6x | 5.2x | PRIMEBANK | 13,962 | 0.8% | 4.3x | 0.6x | RUPALILIFE | 160.0 | 152.1 | 3.0 | 121 | 19.22 |
| IDLC | 29.7 | -2.9% | 0.7 | 8.1x | 0.6x | UPGDCL | 13,547 | 0.8% | 9.7x | 2.2x | PRAGATILIF | 131.5 | 131.0 | 3.0 | 87 | 11.40 |
| HAKKANIPUL | 49.7 | -2.9% | 1.1 | 30.7x | 2.0x | SUMITPOWER | 13,369 | 0.8% | 29.7x | 0.5x | JAMUNAOIL | 177.0 | 177.0 | 1.0 | 60 | 10.62 |
| ASIATICLAB | 53.2 | -2.9% | 123.7 | NM | 1.1x | | | | | | SQRPHARMA | 210.6 | 210.6 | 1.0 | 50 | 10.53 |
| | | | | | | | | | | | RELIANCE1 | 19.8 | 19.8 | 1.0 | 400 | 7.92 |

* 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 | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|--------------|---------------------|---------------|-------------------|-----------------|--------------|
| BEACHHATCH | 76.0 | 72.5 | 91.5 | 1,258 | 18 |
| SAMORITA | 67.7 | 67.1 | 38.4 | 567 | 4 |
| WALTONHIL | 513.0 | 513.0 | 20.5 | 40 | 1 |
| BSRMLTD | 90.0 | 90.0 | 19.6 | 218 | 1 |
| RUPALILIFE | 160.0 | 152.1 | 19.2 | 121 | 3 |
| AIL | 132.0 | 131.6 | 12.0 | 91 | 5 |
| PRAGATILIF | 131.5 | 131.0 | 11.4 | 87 | 3 |
| JAMUNAOIL | 177.0 | 177.0 | 10.6 | 60 | 1 |
| SQURPHARMA | 210.6 | 210.6 | 10.5 | 50 | 1 |
| RELIANCE1 | 19.8 | 19.8 | 7.9 | 400 | 1 |
| AL-HAJTEX | 169.5 | 169.5 | 4.2 | 25 | 1 |
| KBPPWBIL | 179.0 | 179.0 | 3.6 | 20 | 1 |
| EIL | 33.9 | 33.9 | 3.4 | 100 | 1 |
| LOVELLO | 91.7 | 91.4 | 3.1 | 34 | 3 |
| SIMTEX | 25.3 | 25.2 | 2.3 | 90 | 2 |
| RDFOOD | 35.7 | 35.7 | 2.1 | 60 | 1 |
| BEXIMCO | 104.1 | 104.1 | 2.1 | 20 | 2 |
| IFIC | 9.9 | 9.3 | 2.0 | 204 | 2 |
| JAMUNABANK | 16.7 | 16.7 | 1.6 | 97 | 1 |
| REPUBLIC | 33.0 | 33.0 | 1.4 | 43 | 1 |
| MONNOCERA | 90.3 | 90.3 | 0.9 | 10 | 1 |
| 1STPRIMFMF | 39.9 | 39.9 | 0.8 | 21 | 1 |
| Total | | | 274.1 | | 63 |

Important DSE News
HAMI

The Board of Directors of the company has recommended 1% interim cash dividend for the period ended March 31, 2024 except the sponsors and Directors of the Company holding 34.12% shares. Record date for entitlement of Interim Cash Dividend: 26.06.2024

(Q3 Un-audited): EPS was Tk. 0.06 for January-March 2024 as against Tk. (0.19) for January-March 2023. EPS was Tk. 0.21 for July 2023-March 2024 as against Tk. (0.56) for July 2022-March 2023. NOCFPS was Tk. (0.75) for July 2023-March 2024 as against Tk. (0.02) for July 2022-March 2023. NAV per share was Tk. 9.10 as on March 31, 2024 and Tk. 1.97 as on June 30, 2023.

The company has informed that the BOD of the company has decided to take lease of a new agro project in Mohammadpur, Chandgaon, Thana Daudkandi, Cumilla from Mr. Mohammad Salamat Ullah and Md. Tarikul Islam Bhuya for a period of 5 (Five) years from 01.06.24. Total land area is 705 Shotok (23.5 Bigha). Lease Value is 3,52,500 Tk. per year.

RUPALIBANK

(Q1 Un-audited): Consolidated Basic EPS was Tk. 0.49 for January-March 2024 as against Tk. 0.38 (restated) for January-March 2023. Consolidated Diluted EPS (considering share money deposit) was Tk. 0.20 for January-March 2024 as against Tk. 0.15 for January-March 2023. Consolidated NOCFPS was Tk. (24.23) for January-March 2024 as against Tk. (3.74) (restated) for January-March 2023. Consolidated Diluted NOCFPS (considering share money deposit) was Tk. (9.84) for January-March 2024 as against Tk. (1.52) for January-March 2023. Consolidated NAV per share was Tk. 37.07 as on March 31, 2024 and Tk. 36.90 (restated) as on December 31, 2023. Consolidated Diluted NAV per share (considering share money deposit) was Tk. 15.05 as on March 31, 2024 and Tk. 14.98 as on December 31, 2023.

CLICL

The Company has informed that the Board of Directors has appointed Mr. GM Rashed, ACS as the Company Secretary of the Company.

Upcoming Corporate Events

| DSE Ticker | Right Share | Dividend | | Event | Date |
|------------|-------------|----------|------|-------------|-----------|
| | | Stock | Cash | | |
| DHAKAINS | | 0.0% | 17% | Record Date | 3-Jun-24 |
| ABBANK | | 2.0% | 0% | Record Date | 3-Jun-24 |
| UCB | | 5.0% | 0% | Record Date | 3-Jun-24 |
| PEOPLESINS | | 0.0% | 10% | Record Date | 4-Jun-24 |
| RUPALIINS | | 0.0% | 10% | Record Date | 4-Jun-24 |
| PHENIXINS | | 0.0% | 12% | Record Date | 4-Jun-24 |
| UNIONBANK | | 0.0% | 5% | Record Date | 6-Jun-24 |
| GIB | | 5.0% | 5% | Record Date | 6-Jun-24 |
| JANATAINS | | 0.0% | 11% | Record Date | 6-Jun-24 |
| ALARABANK | | 5.0% | 10% | Record Date | 9-Jun-24 |
| CONTININS | | 5.0% | 5% | Record Date | 9-Jun-24 |
| KARNAPHULI | | 0.0% | 10% | Record Date | 9-Jun-24 |
| ICICL | | 0.0% | 10% | Record Date | 10-Jun-24 |
| FEDERALINS | | 0.0% | 10% | Record Date | 10-Jun-24 |
| SOUTHEASTB | | 4.0% | 6% | Record Date | 10-Jun-24 |

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