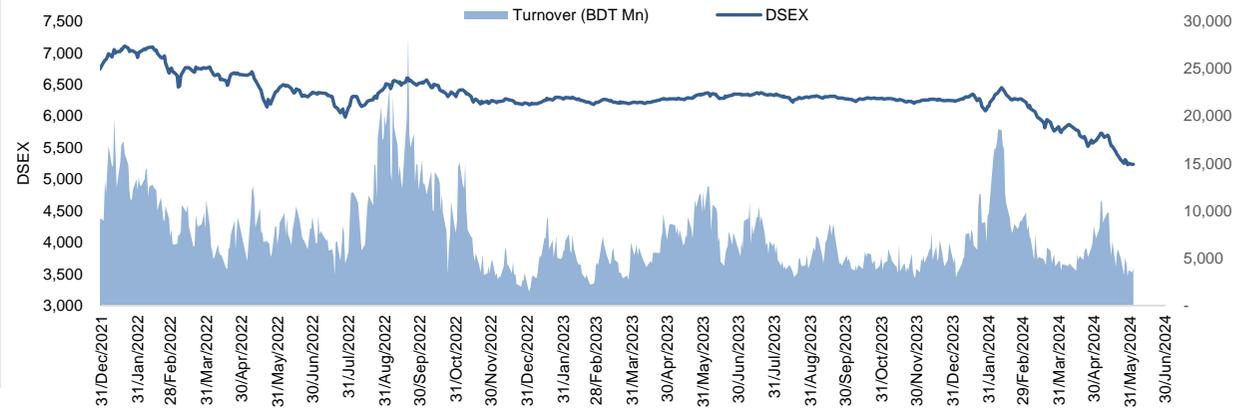


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.04%) gained 1.97 points and closed at 5,235.63. The blue-chip index DS30 (-0.54%), the Shariah-based index DSES (+0.09%), and the large-cap index CDSET (-0.24%) closed at 1,856.99, 1,138.31, and 1,002.57 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 2.45%, followed by Telecommunication (+0.13%), Fuel & Power (+0.05%), Pharmaceutical (-0.18%), Food & Allied (-0.21%), Engineering (-0.33%), and Bank (-0.45%), respectively. Block trades contributed 5.4% of the overall market turnover. Asiatic Laboratories Limited (+8.1%) was the most traded share with a turnover of BDT 191 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,235.63	5,233.67	+1.97	+0.04%	-16.2%
DS30	1,856.99	1,867.05	-10.06	-0.54%	-11.3%
DSES	1,138.31	1,137.26	+1.05	+0.09%	-16.6%
CDSET	1,002.57	1,005.00	-2.43	-0.24%	-16.6%

Figure: Sectorial Turnover (BDT Mn)

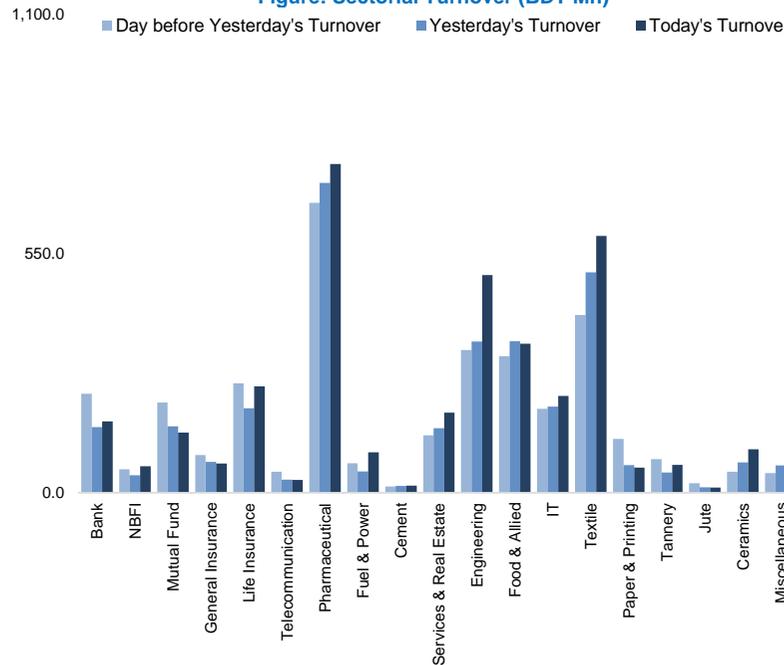
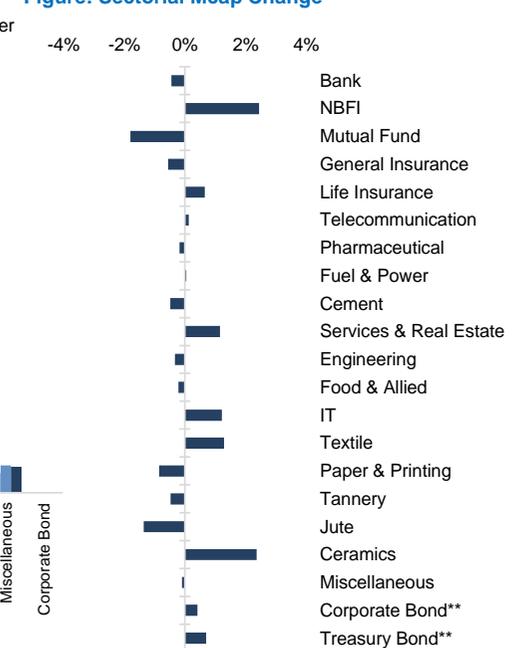


Figure: Sectorial Mcap Change



	Advanced	Declined	Unchanged	Total
All Category	181	157	54	392
A Category (Equity)	90	117	25	232
B Category (Equity)	69	20	13	102
N Category (Equity)	2	2	0	4
Z Category (Equity)	20	18	16	54
Mutual Funds	0	29	8	37
Corporate Bonds	1	2	0	3
Treasury Bonds	2	0	0	2

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,460,957	6,478,982	-0.3%
	Mn USD	54,780	54,933	
Turnover	Mn BDT	3,915	3,495	+12.0%
	Mn USD	33	30	
Volume	Mn Shares	136	120	+13.0%
No. of Trade		132,158	121,661	+8.6%

* Average Interbank Exchange Rate is BDT 117.94 as of Jun 03, 2024

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Istiaz Uddin Research Associate (880) 1708805202 mistiaz.uddin@bracepl.com
---	---

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	1,296	1,301	-5.82	-0.45%	36	619,612	9.6%	164.1	4.4%	7.1x	0.6x	GP	304,763	8.7%	10.2	7.9x	3.8x
NBFI	1,111	1,085	+26.53	+2.45%	23	107,595	1.7%	60.8	1.6%	NM	NM	SQURPHARMA	182,786	5.2%	22.6	9.0x	1.5x
Mutual Fund	678	690	-12.41	-1.80%	37	31,663	0.5%	138.1	3.7%	NM	0.6x	BATBC	177,984	5.1%	14.2	10.2x	3.4x
General Insurance	2,898	2,914	-15.96	-0.55%	43	83,942	1.3%	67.5	1.8%	15.2x	1.3x	WALTONHIL	151,525	4.3%	6.9	11.7x	1.4x
Life Insurance	2,042	2,029	+13.40	+0.66%	15	54,289	0.8%	244.5	6.6%	NM	NM	ROBI	115,758	3.3%	16.6	30.3x	1.7x
Telecommunication	3,780	3,775	+4.92	+0.13%	3	437,671	6.8%	29.8	0.8%	9.9x	2.7x	BEXIMCO	103,842	3.0%	0.0	NM	1.2x
Pharmaceutical	2,999	3,005	-5.29	-0.18%	33	572,552	8.9%	755.9	20.4%	15.5x	1.7x	BERGERPBL	77,279	2.2%	0.0	23.8x	5.8x
Fuel & Power	1,191	1,191	+0.59	+0.05%	23	313,687	4.9%	92.8	2.5%	20.5x	0.7x	RENATA	73,383	2.1%	2.4	32.0x	2.3x
Cement	2,132	2,142	-10.37	-0.48%	7	101,806	1.6%	16.3	0.4%	14.8x	2.0x	UPGDCL	72,462	2.1%	0.6	9.7x	2.1x
Services & Real Estate	1,578	1,560	+18.07	+1.16%	9	87,248	1.4%	184.3	5.0%	27.3x	0.6x	LHBL	67,244	1.9%	10.1	11.9x	2.8x
Engineering	2,704	2,713	-9.00	-0.33%	42	312,458	4.8%	500.5	13.5%	13.1x	1.0x	BRACBANK	59,993	1.7%	26.8	6.7x	0.9x
Food & Allied	15,391	15,424	-32.76	-0.21%	21	282,579	4.4%	343.0	9.3%	15.0x	4.7x	ISLAMIBANK	52,486	1.5%	0.0	8.3x	0.7x
IT	2,465	2,435	+29.81	+1.22%	11	32,432	0.5%	222.3	6.0%	26.8x	2.1x	BXPHARMA	48,180	1.4%	6.8	9.0x	1.0x
Textile	1,250	1,234	+15.99	+1.30%	58	129,643	2.0%	590.4	15.9%	94.9x	0.9x	ICB	46,745	1.3%	4.8	NM	1.1x
Paper & Printing	6,802	6,860	-57.98	-0.85%	6	31,206	0.5%	57.5	1.6%	48.2x	1.5x	DUTCHBANGL	42,535	1.2%	1.8	5.3x	0.9x
Tannery	2,299	2,309	-10.79	-0.47%	6	25,176	0.4%	63.8	1.7%	36.2x	2.4x	POWERGRID	39,385	1.1%	4.1	NM	0.2x
Jute	15,279	15,490	-210.69	-1.36%	3	3,580	0.1%	12.1	0.3%	NM	NM	UNILEVERCL	37,543	1.1%	1.5	43.5x	14.6x
Ceramics	514	502	+11.88	+2.37%	5	22,817	0.4%	100.0	2.7%	44.6x	1.4x	BESTHLDNG	35,272	1.0%	43.1	25.6x	0.6x
Miscellaneous	4,194	4,198	-4.00	-0.10%	15	228,499	3.5%	59.6	1.6%	38.5x	1.8x	EBL	34,497	1.0%	9.5	5.3x	0.8x
Corporate Bond**	5,633	5,610	+23.22	+0.41%	16	42,897	0.7%	0.6	0.0%	NM	NM	BEACONPHAR	31,070	0.9%	25.7	69.0x	5.1x
Treasury Bond**	131	130	+0.91	+0.71%	241	2,939,173	45.5%	0.9	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
MEGHNAPET	33.1	+10.0%	2.3	NM	NM	SQURPHARMA	121,789	7.0%	9.0x	1.5x	ASIATICLAB	57.5	+8.1%	190.9	NM	1.1x
AFTABAUTO	32.0	+10.0%	52.1	NM	0.6x	BATBC	74,086	4.3%	10.2x	3.4x	FEKDIL	19.8	+7.6%	137.6	12.7x	1.0x
STANCERAM	99.5	+9.9%	2.3	NM	NM	BEXIMCO	69,196	4.0%	NM	1.2x	EGEN	40.0	+3.9%	135.4	27.2x	1.7x
CENTRALPHL	19.9	+9.9%	90.4	NM	2.8x	RENATA	68,042	3.9%	32.0x	2.3x	GOLDENSON	21.6	+5.9%	113.0	NM	1.2x
BDTHAI	18.8	+9.9%	45.6	NM	0.7x	BXPHARMA	45,564	2.6%	9.0x	1.0x	BEACHHATCH	76.3	-2.4%	112.5	39.5x	6.1x
GHCL	37.9	+9.9%	23.3	NM	0.9x	GP	38,700	2.2%	7.9x	3.8x	AIL	130.9	-2.4%	105.6	53.0x	5.5x
OAL	13.6	+9.7%	39.6	NM	1x	BEACONPHAR	34,036	2.0%	69.0x	5.1x	SEAPEARL	92.9	+3.9%	95.4	31.2x	4.8x
MONNOFABR	20.6	+9.6%	43.3	NM	0.8x	ISLAMIBANK	33,649	1.9%	8.3x	0.7x	ORIONINFU	538.4	-3.0%	93.9	NM	36.1x
NFML	12.8	+9.4%	4.1	NM	1.1x	BRACBANK	30,964	1.8%	6.7x	0.9x	CENTRALPHL	19.9	+9.9%	90.4	NM	2.8x
ETL	11.7	+8.3%	31.5	28.7x	0.9x	LHBL	28,853	1.7%	11.9x	2.8x	PRAGATILIF	136.6	+1.4%	89.8	NM	NM
						NBL	19,116	1.1%	NM	1.3x						
						PUBALIBANK	18,457	1.1%	4.0x	0.6x						
						CITYBANK	18,190	1.0%	3.7x	0.6x						
						OLYMPIC	16,818	1.0%	15.8x	2.5x						
						ROBI	15,714	0.9%	30.3x	1.7x						
						BSRMLTD	14,210	0.8%	4.6x	0.6x						
						BESTHLDNG	14,098	0.8%	25.6x	0.6x						
						PRIMEBANK	13,962	0.8%	4.3x	0.6x						
						UPGDCL	13,547	0.8%	9.7x	2.1x						
						SUMITPOWER	13,369	0.8%	29.9x	0.5x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)					
SONALIPAPR	314.1	-3.0%	14.7	95.5x	1.8x	RUPALILIFE	166.5	166.4	2.0	200	33.29					
KOHINOOR	622.0	-3.0%	5.1	54.9x	11x	BEACHHATCH	79.5	76.0	12.0	413	31.45					
ORIONINFU	538.4	-3.0%	93.9	NM	36.1x	AL-HAJTEX	179.0	172.0	3.0	114	20.31					
MEGHNACEM	78.3	-3.0%	0.1	NM	1.7x	WALTONHIL	500.0	500.0	1.0	40	20.00					
PHARMAID	637.6	-3.0%	23.9	39.2x	5.9x	PRAGATILIF	133.1	132.5	2.0	106	14.11					
KBPPWBIL	153.8	-3.0%	0.0	NM	13.0x	BSRMLTD	89.9	89.9	1.0	111	9.96					
JUTESPINN	294.7	-3.0%	0.2	NM	NM	EIL	31.0	31.0	3.0	199	6.17					
GLDNJMF	16.4	-3.0%	2.4	NM	1.6x	ICBSONALI1	10.0	10.0	3.0	610	6.10					
HAMI	144.6	-3.0%	1.9	NM	15.9x	ANLIMAYARN	30.1	30.1	2.0	200	6.02					
NITOLINS	30.3	-2.9%	0.5	21.5x	1.0x	BDTHAI	17.0	17.0	1.0	263	4.48					

* 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
RUPALILIFE	166.5	166.4	33.3	200	2
BEACHHATCH	79.5	76.0	31.4	413	12
AL-HAJTEX	179.0	172.0	20.3	114	3
WALTONHIL	500.0	500.0	20.0	40	1
PRAGATILIF	133.1	132.5	14.1	106	2
BSRMLTD	89.9	89.9	10.0	111	1
EIL	31.0	31.0	6.2	199	3
ICBSONALI1	10.0	10.0	6.1	610	3
ANLIMAYARN	30.1	30.1	6.0	200	2
BDTHAI	17.0	17.0	4.5	263	1
ACMEPL	17.0	17.0	4.3	250	1
ASIATICLAB	52.2	52.0	4.1	79	2
AIL	136.5	130.1	3.8	29	3
PTL	71.5	71.5	3.0	42	1
FEKDIL	20.2	18.1	2.7	146	2
SPCL	65.5	65.5	2.4	36	3
MAKSONSPIN	12.0	12.0	2.3	190	1
RECKITTBEN	4,225.0	4,225.0	2.1	1	1
BSC	100.9	100.9	2.0	20	1
ACIFORMULA	130.2	130.2	2.0	15	1
SEAPEARL	86.8	86.8	1.5	18	2
POWERGRID	47.3	47.3	1.5	31	1
Total			210.5		85

Important DSE News
DGIC

The Company has informed that as per the approval of the Board of Directors, Mr. Md. Shakhawat Hossain has joined as the Company Secretary of the Company.

TITASGAS

The Board of Directors has approved the asset revaluation report submitted by ACNABIN Chartered Accountants & ZA Capital Advisory, resulting in an increase of the company's total fixed assets to BDT 4862,60,54,329.00 from BDT 958,35,74,188.33 as of June 30, 2023, an increment of BDT 3904,24,80,140.67.

IFIC

The Company has informed that Mr. Syed Mansur Mustafa has been appointed as the Managing Director of the Company with effect from June 02, 2024.

STANDBANKL

Refer to their earlier news disseminated by DSE on 02.05.2024 regarding dividend declaration, the company has informed that BSEC has accorded its consent to the company for issuance of 2.50% Stock Dividend (Bonus Shares) for the year ended December 31, 2023.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
STANDBANKL		2.5%	3%	Record Date	11-Jun-24
RUPALIBANK		0.0%	0%	Record Date	12-Jun-24
NATLIFEINS		0.0%	38%	Record Date	12-Jun-24

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.