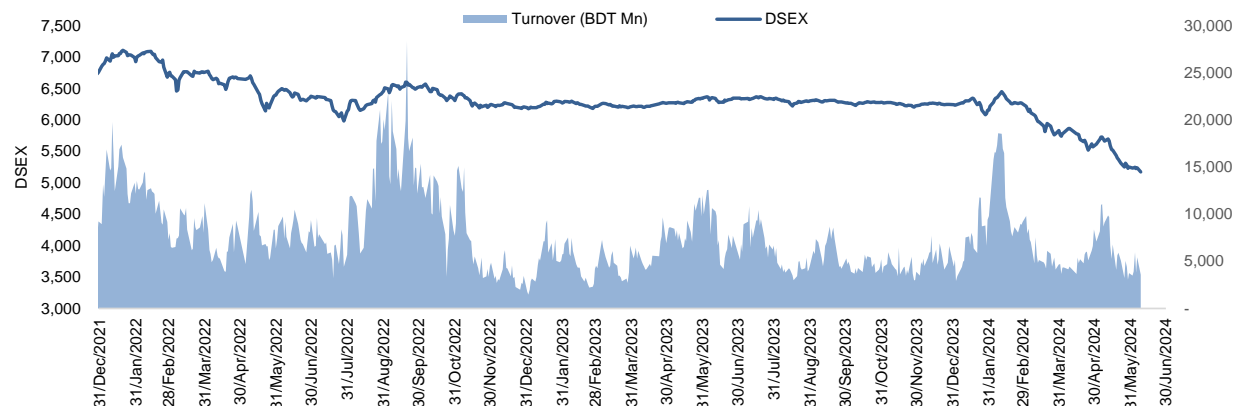


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.26%) lost 65.76 points and closed at 5,171.56. The blue-chip index DS30 (-1.21%), the Shariah-based index DSES (-1.40%), and the large-cap index CDSET (-0.77%) closed at 1,835.46, 1,120.83, and 995.54 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.25% followed by Engineering (-2.06%), Fuel & Power (-1.68%), Pharmaceutical (-1.48%), Bank (-0.85%), Telecommunication (-0.32%), and Food & Allied (+0.08%), respectively. Block trades contributed 13.6% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (-3.0%) was the most traded share with a turnover of BDT 159 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,171.56	5,237.32	-65.76	-1.26%	-17.2%
DS30	1,835.46	1,857.98	-22.52	-1.21%	-12.3%
DSES	1,120.83	1,136.76	-15.94	-1.40%	-17.8%
CDSET	995.54	1,003.22	-7.68	-0.77%	-17.2%

	Advanced	Declined	Unchanged	Total
All Category	33	340	19	392
A Category (Equity)	18	202	12	232
B Category (Equity)	8	94	1	103
N Category (Equity)	0	4	0	4
Z Category (Equity)	7	40	6	53
Mutual Funds	1	30	6	37
Corporate Bonds	1	1	1	3
Treasury Bonds	0	1	0	1

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,390,986	6,464,779	-1.1%
	Mn USD	54,164	54,789	
Turnover	Mn BDT	3,579	5,426	-34.0%
	Mn USD	30	46	
Volume	Mn Shares	107	141	-24.0%
	No. of Trade	109,640	127,261	-13.8%

\* Average Interbank Exchange Rate is BDT 117.99 as of Jun 09, 2024

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Figure: Sectorial Turnover (BDT Mn)

■ Day before Yesterday's Turnover ■ Yesterday's Turnover ■ Today's Turnover

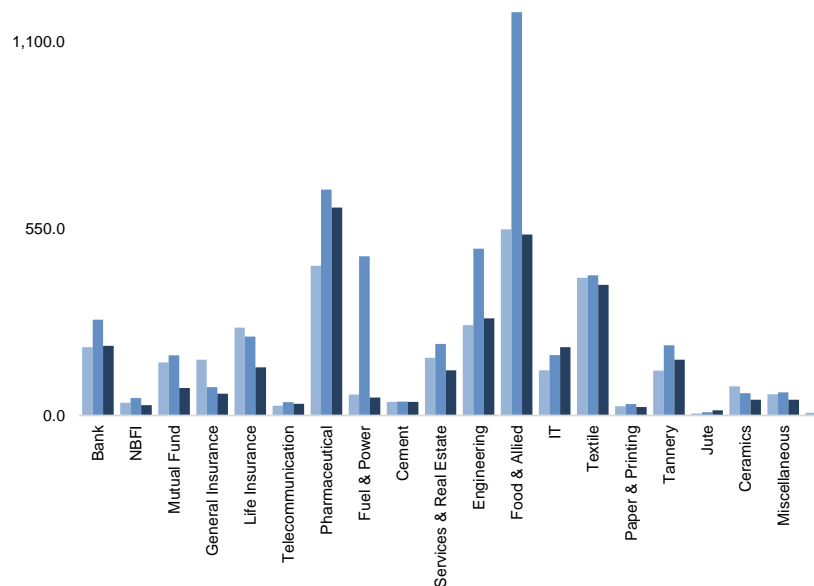
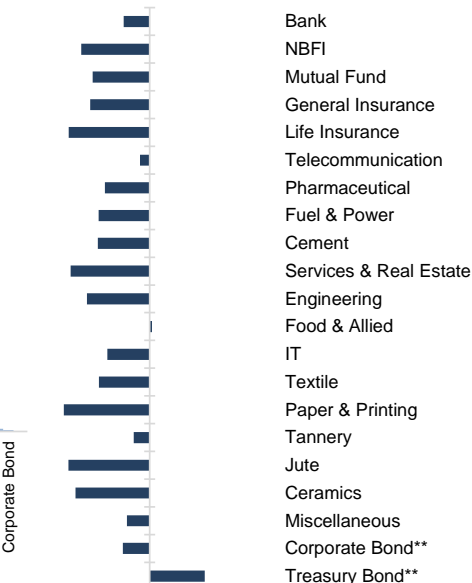


Figure: Sectorial Mcap Change

-4% -2% 0% 2% 4%



Market PE 13.3x  
Market PB 1.1x

\* 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	1,286	1,297	-11.09	-0.85%	36	614,969	9.6%	204.8	6.6%	7.1x	0.6x	GP	309,354	9.0%	15.0	8.0x	3.9x
NBFI	1,074	1,098	-24.76	-2.25%	23	103,932	1.6%	30.2	1.0%	NM	NM	SQURPHARMA	178,265	5.2%	87.4	8.8x	1.5x
Mutual Fund	655	668	-12.53	-1.88%	37	30,616	0.5%	80.7	2.6%	NM	0.6x	BATBC	177,876	5.2%	63.8	10.2x	3.4x
General Insurance	2,850	2,907	-56.87	-1.96%	43	82,545	1.3%	63.9	2.1%	15.0x	1.3x	WALTONHIL	140,953	4.1%	5.1	10.9x	1.3x
Life Insurance	2,018	2,073	-55.35	-2.67%	15	53,650	0.8%	141.9	4.6%	NM	NM	ROBI	110,520	3.2%	17.0	28.9x	1.6x
Telecommunication	3,774	3,786	-12.07	-0.32%	3	436,958	6.8%	34.1	1.1%	9.8x	2.7x	BEXIMCO	103,842	3.0%	0.0	NM	1.2x
Pharmaceutical	2,938	2,982	-44.01	-1.48%	33	560,756	8.8%	611.2	19.8%	15.2x	1.6x	BERGERPBL	75,461	2.2%	0.2	23.2x	5.6x
Fuel & Power	1,170	1,190	-20.04	-1.68%	23	307,978	4.8%	52.8	1.7%	20.1x	0.7x	RENATA	72,236	2.1%	2.0	31.5x	2.2x
Cement	2,124	2,161	-36.91	-1.71%	7	101,429	1.6%	40.0	1.3%	14.7x	2.0x	UPGDCL	71,882	2.1%	1.4	9.6x	2.1x
Services & Real Estate	1,512	1,552	-40.33	-2.60%	9	83,596	1.3%	132.9	4.3%	26.2x	0.6x	LHBL	68,173	2.0%	32.6	12.0x	2.9x
Engineering	2,585	2,639	-54.39	-2.06%	42	298,644	4.7%	285.3	9.2%	12.5x	0.9x	BRACBANK	59,639	1.7%	19.4	6.7x	0.9x
Food & Allied	15,388	15,376	+11.54	+0.08%	21	282,519	4.4%	531.9	17.2%	15.0x	4.7x	ISLAMIBANK	52,486	1.5%	0.0	8.3x	0.7x
IT	2,450	2,485	-34.73	-1.40%	11	32,236	0.5%	201.1	6.5%	26.6x	2.1x	BXPBARMA	46,396	1.3%	8.9	8.7x	1.0x
Textile	1,217	1,238	-20.65	-1.67%	58	126,316	2.0%	384.3	12.4%	92.5x	0.8x	ICB	44,664	1.3%	1.9	NM	1.1x
Paper & Printing	6,494	6,683	-188.70	-2.82%	6	29,793	0.5%	24.8	0.8%	46.0x	1.4x	DUTCHBANGL	42,095	1.2%	1.5	5.2x	0.9x
Tannery	2,392	2,405	-12.71	-0.53%	6	26,202	0.4%	164.1	5.3%	37.7x	2.5x	UNILEVERCL	39,059	1.1%	122.4	45.3x	15.1x
Jute	15,197	15,614	-417.02	-2.67%	3	3,561	0.1%	14.9	0.5%	NM	NM	POWERGRID	36,644	1.1%	5.1	NM	0.2x
Ceramics	494	506	-12.37	-2.45%	5	21,919	0.3%	46.3	1.5%	42.8x	1.3x	EBL	35,176	1.0%	1.2	5.4x	0.8x
Miscellaneous	4,117	4,148	-30.98	-0.75%	15	224,317	3.5%	46.5	1.5%	37.8x	1.7x	BEACONPHAR	33,680	1.0%	40.3	74.8x	5.5x
Corporate Bond**	5,892	5,944	-52.26	-0.88%	16	43,577	0.7%	0.4	0.0%	NM	NM	BESTHLDNG	32,942	1.0%	47.3	23.9x	0.5x
Treasury Bond**	137	135	+2.44	+1.81%	240	2,925,039	45.8%	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
VFSTD	13.9	+9.4%	16.5	29.5x	0.7x	SQURPHARMA	121,789	7.0%	8.8x	1.5x	LOVELLO	91.7	-3.0%	159.1	66.4x	6.9x
NURANI	4.8	+9.1%	2.4	NM	0.5x	BATBC	74,086	4.3%	10.2x	3.4x	FORTUNE	33.8	-0.3%	151.4	33.3x	2.3x
UTTARAFIN	20.3	+6.8%	1.1	NM	0.3x	BEXIMCO	69,196	4.0%	NM	1.2x	ASIATICLAB	52.3	-1.1%	130.8	NM	1.0x
CENTRALPHL	20.9	+4.0%	100.4	NM	2.9x	RENATA	68,042	3.9%	31.5x	2.2x	UNILEVERCL	2,026.5	+0.6%	122.4	45.3x	15.1x
CRYSTALINS	98.1	+3.6%	9.1	34.8x	3.9x	BXPBARMA	45,564	2.6%	8.7x	1.0x	CENTRALPHL	20.9	+4.0%	100.4	NM	2.9x
ENVOYTEX	33.1	+3.4%	1.2	11.7x	0.8x	GP	38,700	2.2%	8.0x	3.9x	EGEN	37.8	-2.1%	89.3	25.7x	1.6x
GBBPOWER	8.3	+2.5%	0.4	NM	0x	BEACONPHAR	34,036	2.0%	74.8x	5.5x	SQURPHARMA	201.1	-1.1%	87.4	8.8x	1.5x
MLDYEING	11.4	+1.8%	5.8	NM	0.9x	ISLAMIBANK	33,649	1.9%	8.3x	0.7x	RUPALILIFE	178.8	-3.0%	83.2	NM	NM
NEWLINE	46.5	+1.8%	0.1	89.4x	1.9x	BRACBANK	30,964	1.8%	6.7x	0.9x	ORIONPHARM	70.7	-1.9%	76.6	16.1x	0.8x
GEMINISEA	230.4	+1.5%	30.4	32.6x	10.5x	LHBL	28,853	1.7%	12.0x	2.9x	BATBC	329.4	+0.9%	63.8	10.2x	3.4x

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)
GIB	6.9	-3.4%	1.9	4.7x	0.5x	MPETROLEUM	198.6	198.6	3.0	775	153.92
PDL	9.7	-3.0%	5.9	NM	1x	BATBC	336.0	336.0	1.0	309	103.82
NPOLYMER	38.8	-3.0%	2.0	14.2x	1.3x	AIL	132.8	124.6	3.0	285	35.56
ESQUIRENIT	19.4	-3.0%	0.8	NM	0.3x	FINEFOODS	180.0	168.0	10.0	194	34.65
AL-HAJTEX	161.7	-3.0%	8.8	NM	17.8x	SQURPHARMA	216.0	198.7	6.0	87	18.00
ISLAMIINS	35.6	-3.0%	0.7	11.8x	1.7x	CNATEX	8.1	8.1	2.0	1,850	14.98
ADVENT	25.9	-3.0%	25.2	26.2x	1.6x	BSRMLTD	89.9	89.9	1.0	128	11.51
UNIQUEHRL	51.8	-3.0%	5.1	10.8x	0.6x	ADVENT	29.3	26.3	3.0	388	11.20
KOHINOOR	592.8	-3.0%	14.3	52.3x	10.3x	RELIANCE1	19.9	19.5	6.0	500	9.91
SONALILIFE	77.8	-3.0%	9.4	NM	NM	WALTONHIL	467.0	467.0	1.0	21	9.81

\* 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
MPETROLEUM	198.6	198.6	153.9	775	3
BATBC	336.0	336.0	103.8	309	1
AIL	132.8	124.6	35.6	285	3
FINEFOODS	180.0	168.0	34.6	194	10
SQURPHARMA	216.0	198.7	18.0	87	6
CNATEX	8.1	8.1	15.0	1,850	2
BSRMLTD	89.9	89.9	11.5	128	1
ADVENT	29.3	26.3	11.2	388	3
RELIANCE1	19.9	19.5	9.9	500	6
WALTONHIL	467.0	467.0	9.8	21	1
EIL	32.7	32.7	6.5	200	1
INDEXAGRO	62.6	62.5	6.3	100	3
OIMEX	27.4	27.1	4.6	170	3
KBPPWBIL	154.5	154.5	4.6	30	1
ORIONPHARM	79.3	79.0	4.0	50	4
BEXIMCO	122.0	104.1	3.9	35	5
SPCL	65.5	65.5	3.4	52	5
LOVELLO	97.0	97.0	3.2	33	1
PTL	71.5	71.5	3.0	42	1
EGEN	39.4	38.0	2.7	70	3
ICBSONALI1	9.4	9.4	2.6	277	1
QUASEMIND	40.4	40.4	2.5	61	1
<b>Total</b>			<b>486.4</b>		<b>99</b>

**Important DSE News**
**RUPALIBANK**

The company has informed that after obtaining permission from the Bangladesh Bank, the Board of Directors of the Company has reviewed the earlier declared dividend (no dividend) and the Board has declared 5% stock dividend for the year ended December 31, 2023, subject to the approval of Bangladesh Securities and Exchange Commission. The record date and schedule of AGM will remain unchanged.

**ACMEPL**

The company has informed that the Board of Directors, meeting held on June 06, 2024, has decided to extend the time of Utilization of IPO proceeds up to June 30, 2025 subject to the approval of shareholders in the Annual General Meeting.

**PDL**

The company has informed, among others, that the production of the factory had to be completely stopped due to the gas supply being cut off without notice in the area of the factory from April 28, 2024 to till now. They have also mentioned that they are fully dependent on gas based captive power.

**KARNAPHULI**

Meghna Life Insurance Co. Ltd., a Corporate Director of the Company, has further informed that it has completed buying of 2,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated on 05.06.2024.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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		5.0%	0%	Record Date	12-Jun-24
NATLIFEINS		0.0%	38%	Record Date	12-Jun-24
PURABIGEN		0.0%	10%	Record Date	25-Jun-24
UNIONINS		0.0%	10%	Record Date	25-Jun-24
HAMI		0.0%	1%	Record Date	26-Jun-24
TAKAFULINS		0.0%	10%	Record Date	27-Jun-24
DGIC		0.0%	5%	Record Date	15-Jul-24

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