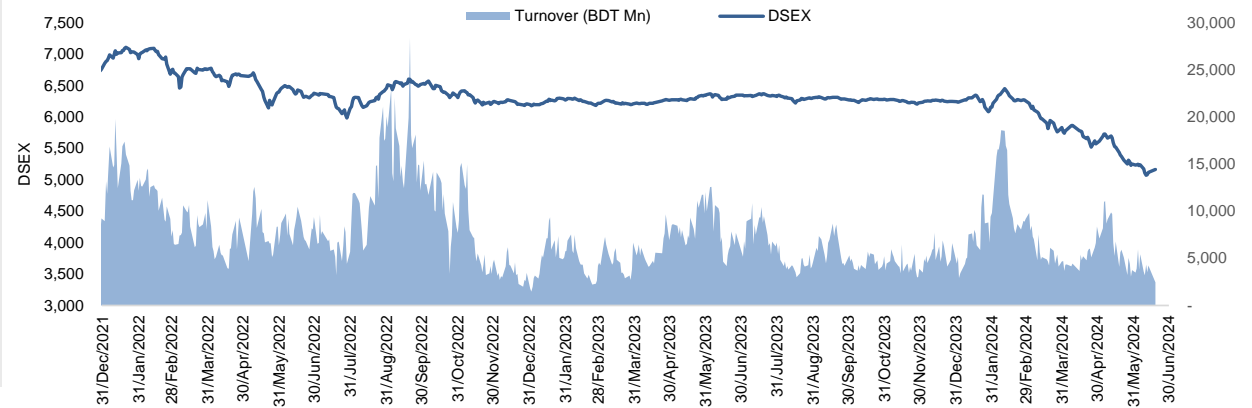


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.85%) gained 43.57 points and closed at 5,161.38. The blue-chip index DS30 (+1.22%), the Shariah-based index DSES (+1.20%), and the large-cap index CDSET (+0.83%) closed at 1,844.13, 1,121.31, and 1,000.50 points, respectively. Most of the large-cap sectors posted positive performance today. Engineering booked the highest gain of 4.43% followed by Pharmaceutical (+2.09%), Food & Allied (+1.16%), NBFi (+0.53%), Fuel & Power (+0.46%), Bank (+0.20%), and Telecommunication (-0.54%), respectively. Block trades contributed 5.5% of the overall market turnover. Crystal Insurance Company Limited (+0.8%) was the most traded share with a turnover of BDT 116 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,161.38	5,117.81	+43.57	+0.85%	-17.4%
DS30	1,844.13	1,821.89	+22.25	+1.22%	-11.9%
DSES	1,121.31	1,108.06	+13.25	+1.20%	-17.8%
CDSET	1,000.50	992.30	+8.20	+0.83%	-16.8%

	Advanced	Declined	Unchanged	Total
All Category	232	96	64	392
A Category (Equity)	156	43	33	232
B Category (Equity)	46	34	23	103
N Category (Equity)	1	3	1	5
Z Category (Equity)	29	16	7	52
Mutual Funds	19	7	11	37
Corporate Bonds	0	0	2	2
Treasury Bonds	1	0	0	1

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,368,589	6,335,939	+0.5%
	Mn USD	53,971	53,694	
Turnover	Mn BDT	2,464	4,231	-41.8%
	Mn USD	21	36	
Volume	Mn Shares	74	100	-26.1%
	No. of Trade	81,761	99,479	-17.8%

\* Average Interbank Exchange Rate is BDT 118.00 as of Jun 19, 2024

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Figure: Sectorial Turnover (BDT Mn)

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

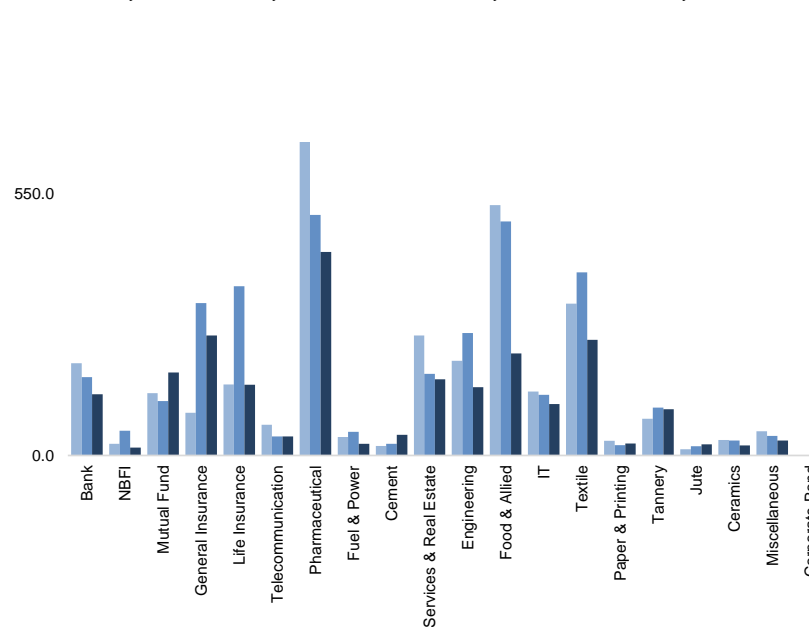
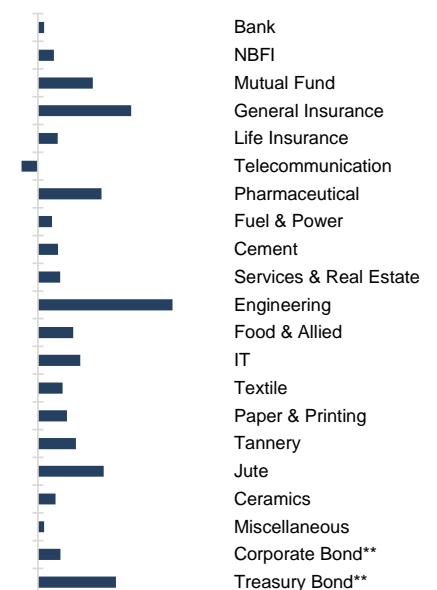


Figure: Sectorial Mcap Change

-2% 0% 2% 4% 6%



Market PE 13.4x  
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	1,277	1,275	+2.57	+0.20%	36	610,765	9.6%	128.5	5.5%	7.0x	0.6x	GP	300,037	8.7%	31.4	7.8x	3.7x
NBFI	1,056	1,050	+5.52	+0.53%	23	102,224	1.6%	16.4	0.7%	NM	NM	SQURPHARMA	181,457	5.3%	35.1	9.0x	1.5x
Mutual Fund	650	639	+11.54	+1.81%	37	30,371	0.5%	174.5	7.5%	NM	0.6x	BATBC	173,718	5.1%	12.2	10.0x	3.3x
General Insurance	2,915	2,828	+86.88	+3.07%	43	84,421	1.3%	251.8	10.8%	15.2x	1.3x	WALTONHIL	147,011	4.3%	5.7	11.4x	1.3x
Life Insurance	1,957	1,945	+12.58	+0.65%	15	52,036	0.8%	148.8	6.4%	NM	NM	ROBI	107,378	3.1%	7.6	28.1x	1.6x
Telecommunication	3,667	3,687	-19.74	-0.54%	3	424,597	6.7%	40.0	1.7%	9.6x	2.6x	BEXIMCO	103,842	3.0%	0.0	NM	1.2x
Pharmaceutical	2,996	2,935	+61.37	+2.09%	33	571,931	9.0%	427.6	18.4%	15.5x	1.7x	BERGERPBL	80,985	2.4%	2.1	24.9x	6.0x
Fuel & Power	1,151	1,145	+5.27	+0.46%	23	302,941	4.8%	24.5	1.1%	19.8x	0.7x	RENATA	71,857	2.1%	0.9	31.3x	2.2x
Cement	2,115	2,101	+13.92	+0.66%	7	100,996	1.6%	43.1	1.9%	14.6x	2.0x	UPGDCL	70,317	2.0%	0.8	9.4x	2.1x
Services & Real Estate	1,487	1,477	+10.75	+0.73%	9	82,241	1.3%	159.9	6.9%	25.8x	0.6x	LHBL	68,869	2.0%	40.0	12.2x	2.9x
Engineering	2,622	2,511	+111.29	+4.43%	42	302,907	4.8%	143.2	6.1%	12.7x	0.9x	BRACBANK	59,816	1.7%	11.4	6.7x	0.9x
Food & Allied	15,453	15,276	+176.80	+1.16%	21	283,713	4.5%	214.3	9.2%	15.1x	4.8x	ISLAMIBANK	52,486	1.5%	0.0	8.3x	0.7x
IT	2,399	2,366	+33.09	+1.40%	11	31,558	0.5%	108.0	4.6%	26.0x	2.0x	BXPHARMA	46,485	1.4%	4.4	8.7x	1.0x
Textile	1,198	1,188	+9.65	+0.81%	58	124,248	2.0%	242.9	10.4%	NM	0.8x	UNILEVERCL	46,426	1.4%	11.4	53.8x	18.0x
Paper & Printing	6,192	6,133	+58.39	+0.95%	6	28,406	0.4%	24.9	1.1%	43.9x	1.4x	ICB	46,225	1.3%	1.7	NM	1.1x
Tannery	2,391	2,362	+29.56	+1.25%	6	26,189	0.4%	97.2	4.2%	37.7x	2.5x	DUTCHBANGL	41,920	1.2%	1.5	5.2x	0.8x
Jute	14,240	13,938	+301.35	+2.16%	3	3,337	0.1%	23.4	1.0%	NM	NM	BEACONPHAR	38,161	1.1%	71.0	84.7x	6.2x
Ceramics	478	476	+2.74	+0.58%	5	21,236	0.3%	21.3	0.9%	41.5x	1.3x	POWERGRID	35,182	1.0%	0.1	NM	0.2x
Miscellaneous	4,179	4,171	+8.63	+0.21%	15	227,729	3.6%	31.1	1.3%	38.4x	1.8x	EBL	34,904	1.0%	0.3	5.3x	0.8x
Corporate Bond**	6,008	5,963	+44.39	+0.74%	16	42,827	0.7%	0.2	0.0%	NM	NM	BESTHLDNG	30,930	0.9%	18.9	22.5x	0.5x
Treasury Bond**	146	142	+3.65	+2.57%	240	2,913,505	45.8%	7.7	0.3%	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
STYLECRAFT	57.5	+9.9%	2.5	NM	6.3x	SQURPHARMA	121,789	7.0%	9.0x	1.5x	CRYSTALINS	107.4	+0.8%	116.1	38.1x	4.3x
CENTRALINS	48.0	+9.8%	46.0	23.9x	1.0x	BATBC	74,086	4.3%	10.0x	3.3x	PRAGATILIF	134.8	+4.1%	89.3	NM	NM
BIFC	10.2	+9.7%	2.3	NM	NM	BEXIMCO	69,196	4.0%	NM	1.2x	FORTUNE	33.7	+5.0%	77.7	33.2x	2.3x
GLDNJMF	17.1	+9.6%	55.9	NM	1.7x	RENATA	68,042	3.9%	31.3x	2.2x	ASIATICLAB	53.8	-1.8%	73.7	NM	1.1x
CAPITECGBF	13.7	+9.6%	63.3	NM	1.4x	BXPHARMA	45,564	2.6%	8.7x	1.0x	LOVELLO	86.8	-2.6%	72.5	62.9x	6.6x
SAFKOSPINN	13.6	+8.8%	2.8	NM	3.0x	GP	38,700	2.2%	7.8x	3.7x	BEACONPHAR	165.2	+7.5%	71.0	84.7x	6.2x
WALTONHIL	485.3	+8.7%	5.7	11.4x	1x	BEACONPHAR	34,036	2.0%	84.7x	6.2x	FEKDIL	19.3	+7.8%	69.5	12.4x	1.0x
MERCINS	30.4	+8.2%	0.2	26.4x	1.5x	ISLAMIBANK	33,649	1.9%	8.3x	0.7x	UNIQUEHRL	55.0	+4.6%	65.6	11.4x	0.6x
AIBL1STIMF	8.0	+8.1%	2.2	NM	0.9x	BRACBANK	30,964	1.8%	6.7x	0.9x	CAPITECGBF	13.7	+9.6%	63.3	NM	1.4x
ARAMITCEM	19.2	+7.9%	0.6	NM	NM	LHBL	28,853	1.7%	12.2x	2.9x	AIL	119.4	-0.7%	61.3	48.3x	5.0x

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)
SICL	27.0	-3.9%	7.0	NM	0.9x	PUBALIBANK	18,457	1.1%	4.0x	0.6x	PRAGATILIF	135.0	125.7	4.0	201	27.02
KBPPWBIL	117.4	-3.0%	0.3	NM	10x	CITYBANK	18,190	1.0%	3.7x	0.6x	DGIC	28.7	25.4	4.0	723	19.53
PHPMF1	3.3	-2.9%	0.2	NM	0.4x	OLYMPIC	16,818	1.0%	14.2x	2.3x	SAMORITA	69.4	68.3	2.0	249	17.23
EXIM1STMF	3.4	-2.9%	0.3	NM	0.4x	ROBI	15,714	0.9%	28.1x	1.6x	SQURPHARMA	204.5	204.5	2.0	78	15.91
EBLNRBMF	3.4	-2.9%	0.7	NM	0.4x	BSRMLTD	14,210	0.8%	4.6x	0.6x	RUPALILIFE	192.7	192.1	2.0	80	15.39
RINGSHINE	3.4	-2.9%	0.3	NM	NM	BESTHLDNG	14,098	0.8%	22.5x	0.5x	APEXFOOT	242.0	216.0	2.0	47	10.82
PREMIERLEA	3.5	-2.8%	0.1	NM	NM	PRIMEBANK	13,962	0.8%	4.5x	0.6x	PARAMOUNT	55.0	51.5	7.0	111	5.76
COPPERTECH	28.2	-2.8%	7.4	65.6x	2.1x	UPGDCL	13,547	0.8%	9.4x	2.1x	MEGHNAINS	28.2	28.2	2.0	200	5.64
PRIMETEX	14.5	-2.7%	0.2	NM	0.2x	SUMITPOWER	13,369	0.8%	28.9x	0.5x	AIL	120.5	117.0	2.0	34	4.12
JUTESPINN	299.2	-2.6%	0.0	NM	NM						BEXIMCO	118.5	104.8	8.0	37	4.00

\* 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
PRAGATILIF	135.0	125.7	27.0	201	4
DGIC	28.7	25.4	19.5	723	4
SAMORITA	69.4	68.3	17.2	249	2
SQURPHARMA	204.5	204.5	15.9	78	2
RUPALILIFE	192.7	192.1	15.4	80	2
APEXFOOT	242.0	216.0	10.8	47	2
PARAMOUNT	55.0	51.5	5.8	111	7
MEGHNAIS	28.2	28.2	5.6	200	2
AIL	120.5	117.0	4.1	34	2
BEXIMCO	118.5	104.8	4.0	37	8
FIRSTSBANK	6.1	6.1	1.8	300	1
SONALIPAPR	260.0	260.0	1.3	5	1
PTL	75.9	75.9	0.9	11	1
JAMUNABANK	16.5	16.5	0.8	50	1
EGEN	37.7	37.7	0.8	21	1
BRACBANK	33.0	33.0	0.7	21	1
CNATEX	7.0	7.0	0.7	100	1
PDL	9.1	9.1	0.7	75	1
MARICO	2,010.0	2,010.0	0.6		1
FEKDIL	19.1	19.1	0.5	28	1
RINGSHINE	3.4	3.4	0.5	150	1
LOVELLO	94.7	94.7	0.5	5	1
<b>Total</b>			<b>135.2</b>		<b>47</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
DELTALIFE		0.0%	30%	Record Date	8-Jul-24
BDFINANCE		0.0%	0%	Record Date	8-Jul-24
DGIC		0.0%	5%	Record Date	15-Jul-24

**Important DSE News**
**SICL**

The Board of Directors has recommended 3% Cash Dividend for the year ended December 31, 2023. Date of AGM: 26.09.2024, Time: 11:00 AM, AGM mode: Hybrid System (through Physical presence and Digital platform virtually). Record date: 25.07.2024. The Company has also reported EPS of Tk. 1.34, NAV per share of Tk. 30.49 and NOCFPS of Tk. 0.36 for the year ended December 31, 2023 as against Tk. 1.22, Tk. 28.73 and Tk. 2.27 respectively for the year ended December 31, 2022.

**WALTONHIL**

Mr. S. M. Rezaul Alam, a Sponsor Director of the Company, has further informed that he has completed his sale of 500,000 shares of the Company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated on 30.04.2024.

**NORTHRNINS**

The company has informed that Mr. Biddut Kumar Samadder CAP, will hold the position of Company Secretary (Acting) until further information. His mobile no. is: 01712704417.

**RENATA**

The company has informed that it has shipped the initial consignment of Terbinafine 250 mg tablets to the UK market, known by its brand name of Terbimax in Bangladesh. The product is being supplied directly from the Company's UK MHRA-approved facility in Rajendrapur, Gazipur and will be commercialized under the livery of Renata (UK) Limited.

**POWERGRID**

The company has informed that Bangladesh Securities and Exchange Commission has given consent to Power Grid Company of Bangladesh (PGCB) to issue 250,54,04,976 Irredeemable and Noncumulative Preference Shares of face value of Tk. 10 each totaling of Tk. 2,505,40,49,760.00 in favor of Secretary, Power Division, Ministry of Power, Energy & Mineral Resources, other than existing shareholders of the company against share money deposit for the year ended on 30th June, 2023 as per audited financial statements for the Financial Year 2022-23.

**TRUSTBANK**

The company has informed that the Board of Directors has approved issuance of TBL Fully Redeemable Non-Convertible Unsecured Subordinated Bond-VII worth BDT 500.00 Crore (Taka Five Hundred Crore) only to strengthen the capital base subject to approval of Regulatory Authorities.

**EXIMBANK**

The company has informed that the Board of Directors has accorded its approval for issuance of EXIM 6th Subordinated Bond for Tk. 300.00 (Three Hundred) Crore only as a process of inclusion in Tier-II capital for a period of 7 (seven) years through private placement subject to the approval of the Regulatory Authorities and compliance of all formalities in this respect.

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