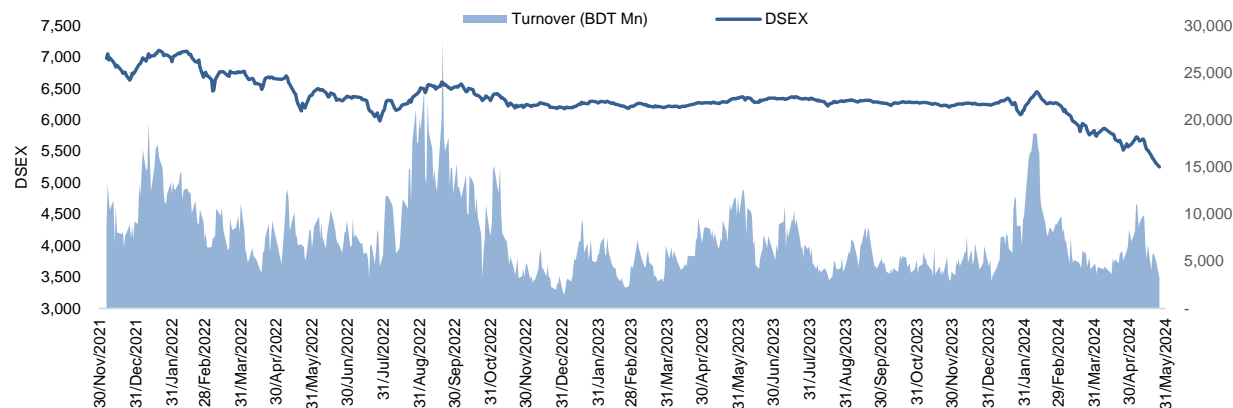


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.16%) lost 61.55 points and closed at 5,250.85. The blue-chip index DS30 (-0.99%), the Shariah-based index DSES (-1.13%), and the large-cap index CDSET (-0.84%) closed at 1,888.72, 1,146.47, and 1,002.42 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.38% followed by Engineering (-2.33%), Food & Allied (-2.28%), Pharmaceutical (-1.51%), Fuel & Power (-1.14%), Bank (-0.65%), and Telecommunication (-0.50%), respectively. Block trades contributed 17.7% of the overall market turnover. Orion Pharma Ltd. (-2.6%) was the most traded share with a turnover of BDT 209 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,250.85	5,312.40	-61.55	-1.16%	-15.9%
DS30	1,888.72	1,907.70	-18.98	-0.99%	-9.8%
DSES	1,146.47	1,159.54	-13.06	-1.13%	-16.0%
CDSET	1,002.42	1,010.94	-8.52	-0.84%	-16.7%

	Advanced	Declined	Unchanged	Total
All Category	31	322	29	382
A Category (Equity)	20	190	15	225
B Category (Equity)	4	90	6	100
N Category (Equity)	0	3	1	4
Z Category (Equity)	7	39	7	53
Mutual Funds	1	29	7	37
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,473,712	6,530,667	-0.9%
	Mn USD	54,945	55,428	
Turnover	Mn BDT	3,228	5,080	-36.5%
	Mn USD	27	43	
Volume	Mn Shares	93	111	-16.6%
	No. of Trade	81,365	98,429	-17.3%

* Average Interbank Exchange Rate is BDT 117.82 as of May 26, 2024

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Figure: Sectorial Turnover (BDT Mn)

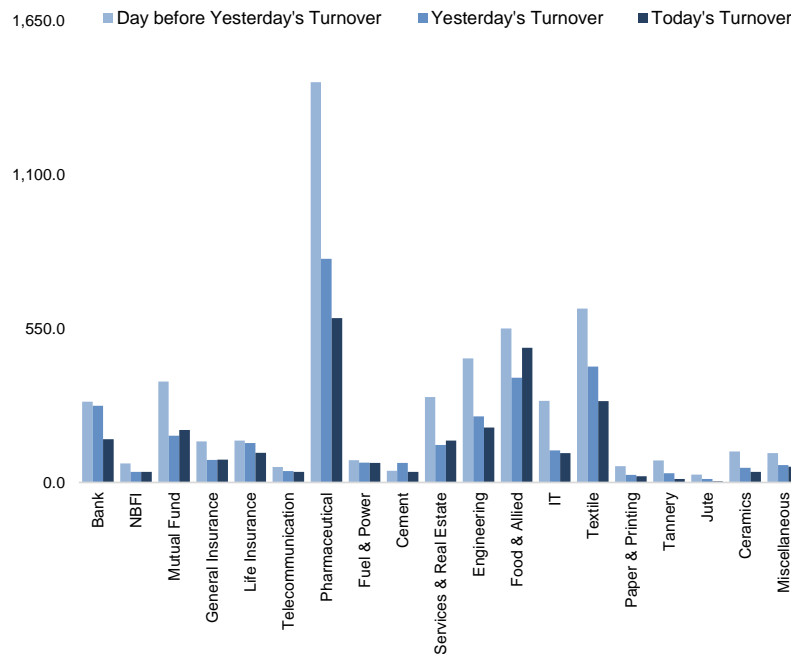
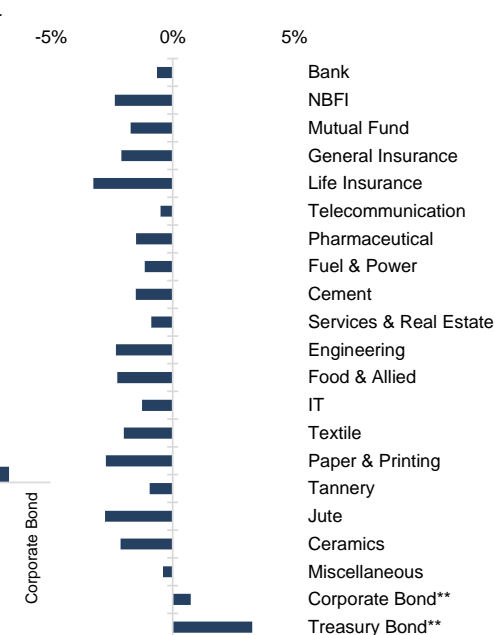


Figure: Sectorial Mcap Change



Market PE 13.6x
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	1,308	1,316	-8.51	-0.65%	36	625,309	9.7%	154.5	5.8%	7.2x	0.6x	GP	305,168	8.7%	15.0	7.9x	3.8x
NBFI	1,112	1,139	-27.06	-2.38%	23	107,603	1.7%	38.1	1.4%	NM	NM	SQURPHARMA	182,166	5.2%	46.1	9.0x	1.5x
Mutual Fund	681	693	-12.02	-1.74%	37	31,812	0.5%	187.1	7.0%	NM	0.6x	BATBC	170,586	4.9%	152.2	9.8x	3.3x
General Insurance	2,981	3,045	-64.42	-2.12%	43	86,344	1.3%	81.1	3.1%	15.7x	1.3x	WALTONHIL	158,250	4.5%	11.1	12.2x	1.5x
Life Insurance	1,988	2,055	-67.02	-3.26%	15	52,850	0.8%	106.0	4.0%	NM	NM	ROBI	112,092	3.2%	20.8	29.3x	1.7x
Telecommunication	3,756	3,775	-18.87	-0.50%	3	434,904	6.7%	38.2	1.4%	9.8x	2.7x	BEXIMCO	103,842	3.0%	0.2	NM	1.2x
Pharmaceutical	3,030	3,077	-46.51	-1.51%	33	578,416	8.9%	586.8	22.1%	15.6x	1.7x	BERGERPBL	78,842	2.2%	1.0	24.2x	5.9x
Fuel & Power	1,181	1,195	-13.66	-1.14%	23	310,895	4.8%	69.6	2.6%	20.3x	0.7x	RENATA	72,431	2.1%	8.3	31.6x	2.2x
Cement	2,121	2,154	-32.79	-1.52%	7	101,310	1.6%	37.9	1.4%	14.7x	2.0x	UPGDCL	72,346	2.1%	3.4	9.7x	2.1x
Services & Real Estate	1,563	1,577	-13.83	-0.88%	9	86,419	1.3%	149.2	5.6%	27.1x	0.6x	LHBL	67,360	1.9%	27.6	11.9x	2.8x
Engineering	2,738	2,803	-65.30	-2.33%	42	316,287	4.9%	196.5	7.4%	13.2x	1.0x	BRACBANK	61,409	1.7%	22.4	6.9x	0.9x
Food & Allied	15,161	15,514	-353.09	-2.28%	21	278,346	4.3%	481.3	18.1%	14.8x	4.7x	ISLAMIBANK	52,486	1.5%	0.2	8.3x	0.7x
IT	2,536	2,568	-32.41	-1.26%	11	33,362	0.5%	105.3	4.0%	27.5x	2.2x	ICB	47,959	1.4%	1.8	NM	1.1x
Textile	1,228	1,253	-25.13	-2.01%	58	127,386	2.0%	290.4	10.9%	97.8x	0.9x	BXPHARMA	47,689	1.4%	11.6	8.9x	1.0x
Paper & Printing	6,841	7,034	-193.12	-2.75%	6	31,387	0.5%	22.6	0.9%	48.5x	1.5x	DUTCHBANGL	41,656	1.2%	1.1	5.2x	0.8x
Tannery	2,353	2,376	-22.48	-0.95%	6	25,776	0.4%	12.6	0.5%	37.1x	2.5x	UNILEVERCL	41,249	1.2%	96.4	47.8x	16.0x
Jute	17,045	17,532	-487.01	-2.78%	3	3,994	0.1%	3.7	0.1%	NM	NM	POWERGRID	37,375	1.1%	3.2	NM	0.2x
Ceramics	494	505	-10.86	-2.15%	5	21,951	0.3%	37.7	1.4%	42.2x	1.3x	EBL	35,447	1.0%	12.2	5.4x	0.8x
Miscellaneous	4,263	4,280	-17.23	-0.40%	15	232,288	3.6%	56.7	2.1%	39.2x	1.8x	BESTHLDNG	35,378	1.0%	67.6	25.7x	0.6x
Corporate Bond**	5,387	5,347	+39.76	+0.74%	16	42,874	0.7%	0.0	0.0%	NM	NM	BEACONPHAR	34,997	1.0%	25.4	77.7x	5.7x
Treasury Bond**	118	115	+3.74	+3.27%	241	2,943,755	45.5%	0.0	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
BIFC	9.0	+9.8%	2.8	NM	NM	SQURPHARMA	121,789	7.0%	9.0x	1.5x	ORIONPHARM	74.0	-2.6%	209.2	16.9x	0.8x
AFCAGRO	15.0	+7.1%	12.5	NM	0.8x	BATBC	74,086	4.3%	9.8x	3.3x	BATBC	315.9	-2.8%	152.2	9.8x	3.3x
SAMORITA	71.6	+6.5%	14.4	NM	1.4x	BEXIMCO	69,196	4.0%	NM	1.2x	LOVELLO	88.9	+6.5%	127.6	64.4x	6.7x
LOVELLO	88.9	+6.5%	127.6	64.4x	6.7x	RENATA	68,042	3.9%	31.6x	2.2x	UNILEVERCL	2,140.1	-3.0%	96.4	47.8x	16.0x
ACTIVEFINE	16.1	+5.9%	45.7	NM	0.7x	BXPHARMA	45,564	2.6%	8.9x	1.0x	RELIANCE1	19.8	-1.5%	90.1	NM	1.8x
JHRML	70.3	+3.5%	25.9	27.6x	2.1x	GP	38,700	2.2%	7.9x	3.8x	ORIONINFU	551.4	-2.9%	72.6	NM	37.0x
RUPALILIFE	144.0	+3.4%	34.9	NM	NM	BEACONPHAR	34,036	2.0%	77.7x	5.7x	BESTHLDNG	33.4	-	67.6	25.7x	0.6x
FASFIN	3.4	+3.0%	1.2	NM	NM	ISLAMIBANK	33,649	1.9%	8.3x	0.7x	SIMTEX	24.2	-2.8%	61.3	25.5x	1.1x
SANDHANINS	24.2	+3.0%	9.7	NM	NM	BRACBANK	30,964	1.8%	6.9x	0.9x	AIL	128.0	-0.5%	58.9	51.8x	5.3x
APEXFOOT	219.3	+2.2%	1.4	21.4x	1.0x	LHBL	28,853	1.7%	11.9x	2.8x	SQURPHARMA	205.5	-0.1%	46.1	9.0x	1.5x
						NBL	19,116	1.1%	NM	1.3x						
						PUBALIBANK	18,457	1.1%	3.9x	0.6x						
						CITYBANK	18,190	1.0%	3.7x	0.6x						
						OLYMPIC	16,818	1.0%	15.5x	2.5x						
						ROBI	15,714	0.9%	29.3x	1.7x						
						BSRMLTD	14,210	0.8%	4.6x	0.6x						
						BESTHLDNG	14,098	0.8%	25.7x	0.6x						
						PRIMEBANK	13,962	0.8%	4.1x	0.6x						
						UPGDCL	13,547	0.8%	9.7x	2.1x						
						SUMITPOWER	13,369	0.8%	29.6x	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)					
NATLIFEINS	102.7	-8.8%	10.6	NM	NM	MPETROLEUM	198.6	198.6	2.0	707	140.41					
WMSHIPYARD	9.7	-3.0%	7.8	NM	1x	UNILEVERCL	2,250.0	2,250.0	3.0	62	138.66					
GEMINISEA	252.5	-3.0%	14.3	35.8x	11.5x	LOVELLO	85.0	84.0	4.0	950	80.68					
OIMEX	25.9	-3.0%	38.8	72.4x	8.3x	STANDBANKL	6.4	6.4	5.0	7,134	45.66					
UNILEVERCL	2,140.1	-3.0%	96.4	47.8x	16.0x	SAMORITA	73.9	70.5	3.0	500	35.49					
KOHINOOR	689.7	-3.0%	31.5	60.9x	12.0x	ASIATICLAB	69.4	61.3	2.0	409	25.15					
HWAWELLTEX	42.1	-3.0%	1.2	10.1x	1.1x	BSRMLTD	90.0	90.0	1.0	222	19.94					
TOSRIFA	22.7	-3.0%	10.1	37.8x	0.7x	WALTONHIL	528.0	528.0	3.0	29	15.31					
PROGRESLIF	42.2	-3.0%	0.7	NM	NM	AIL	132.0	124.9	4.0	108	13.50					
ICB	55.3	-3.0%	1.8	NM	1.1x	DGIC	31.9	28.2	2.0	327	9.87					

* 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	140.4	707	2
UNILEVERCL	2,250.0	2,250.0	138.7	62	3
LOVELLO	85.0	84.0	80.7	950	4
STANDBANKL	6.4	6.4	45.7	7,134	5
SAMORITA	73.9	70.5	35.5	500	3
ASIATICLAB	69.4	61.3	25.1	409	2
BSRMLTD	90.0	90.0	19.9	222	1
WALTONHIL	528.0	528.0	15.3	29	3
AIL	132.0	124.9	13.5	108	4
DGIC	31.9	28.2	9.9	327	2
SQURPHARMA	200.5	199.9	6.4	32	6
PARAMOUNT	65.0	61.0	5.4	84	3
SEAPEARL	86.5	86.5	4.3	50	1
ISLAMIINS	42.0	42.0	3.3	78	1
SALVOCHEM	60.3	60.3	3.0	50	2
DUTCHBANGL	52.0	52.0	2.4	45	1
SAIHAMCOT	14.3	14.3	2.0	140	2
BBSCABLES	28.8	28.8	1.9	65	1
INTRACO	35.9	34.9	1.8	51	3
POPULARLIF	51.7	51.7	1.5	29	2
RUPALILIFE	136.0	135.5	1.3	9	2
ICBSONALI1	11.4	11.4	1.3	110	1
Total			572.1		72

Important DSE News
NATLIFEINS

The Board of Directors has recommended 38% Cash Dividend for the year ended December 31, 2023. Date of AGM: 30.06.2024, Time: 12:00 P.M, Venue: Digital Platform. Record Date: 12.06.2024. The Company has also reported Consolidated EPS of Tk. 4.23, Consolidated NAV per share of Tk. 51.02 and Consolidated NOCFPS of Tk. 46.51 for the year ended December 31, 2023 as against Tk. 5.78, Tk. 68.22 and Tk. 24.10 respectively for the year ended December 31, 2022.

(Q1 Un-audited): As per consolidated life revenue account of the company for Jan-Mar 2024, excess of total income over total expenses including claims (Surplus) was BDT 783.32 million as against excess of total income over total expenses including claims (Surplus) of BDT 466.71 million in the corresponding previous period 2023.

PHARMAID

The Company has informed that the Board of Directors has decided to purchase 103.00 decimal land adjacent to Nabinagar-Chandra highway at Mouza: Chandora, PS & SRO: Kaliakoir, District: Gazipur, for a total investment up to Tk. 11,38,00,000.00 (Eleven Crore Thirty-Eight Lac) only, excluding the cost for registration and other related expenses, and depending on the availability of necessary funds

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
BNICL		0.0%	20%	Record Date	27-May-24
PRAGATIINS		7.0%	20%	Record Date	27-May-24
MARICO		0.0%	200%	Record Date	27-May-24
SIBL		5.0%	0%	Record Date	28-May-24
TRUSTBANK		8.0%	12%	Record Date	29-May-24
SBACBANK		0.0%	2%	Record Date	29-May-24
ISLAMIINS		0.0%	15%	Record Date	30-May-24
ASIAPACINS		0.0%	12%	Record Date	30-May-24
EASTERNINS		0.0%	20%	Record Date	30-May-24
NRBBANK		0.0%	10%	Record Date	2-Jun-24
NCCBANK		0.0%	12%	Record Date	2-Jun-24
DHAKAINS		0.0%	17%	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

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