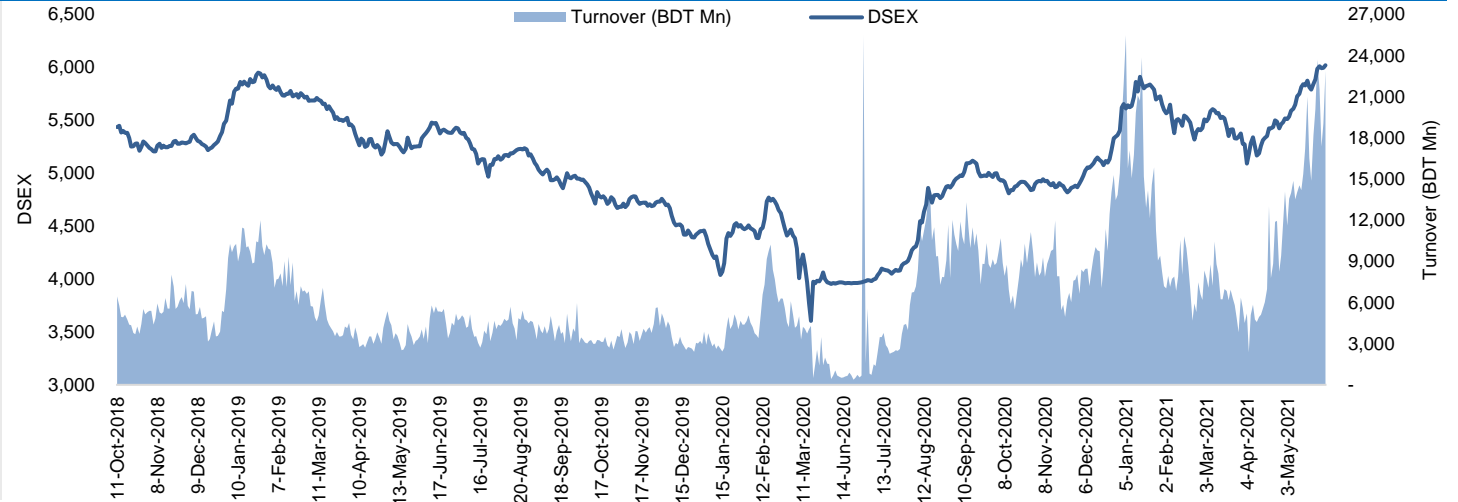


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.43%) gained 25.67 points and closed at 6,019.00. The blue-chip index DS30 (+0.08%), the Shariah-based index DSES (+0.03%), and the large-cap index CDSET (-0.10%) closed at 2,195.33, 1,284.52, and 1,231.89 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 2.10% followed by Engineering (+0.70%), Bank (+0.62%), Pharmaceutical (+0.14%). Fuel & Power experienced the highest loss of 0.57% followed by Telecommunication (-0.42%), Food & Allied (-0.39%). Block trades contributed 5.4% of the overall market turnover. Bangladesh Export Import Company Ltd. (-1.8%) was the most traded share with a turnover of BDT 846 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,019.00	5,993.33	+25.67	+0.43%	+11.4%
DS30	2,195.33	2,193.63	+1.70	+0.08%	+11.8%
DSES	1,284.52	1,284.07	+0.45	+0.03%	+3.4%
CDSET	1,231.89	1,233.16	-1.27	-0.10%	+9.7%

	Advanced	Declined	Unchanged	Total
All Category	164	147	57	368
A Category (Equity)	123	106	41	270
B Category (Equity)	27	18	14	59
N Category (Equity)	3	8	0	11
Z Category (Equity)	11	15	2	28
Mutual Funds	13	15	8	36
Corporate Bonds	0	1	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,052,256	5,041,669	+0.2%
	Mn USD	59,466	59,342	
Turnover	Mn BDT	22,873	19,035	+20.2%
	Mn USD	269	224	
Volume	Mn Shares	704	601	+17.3%
No. of Trade		304,588	278,441	+9.4%

Figure: Sectorial Turnover (BDT Mn)

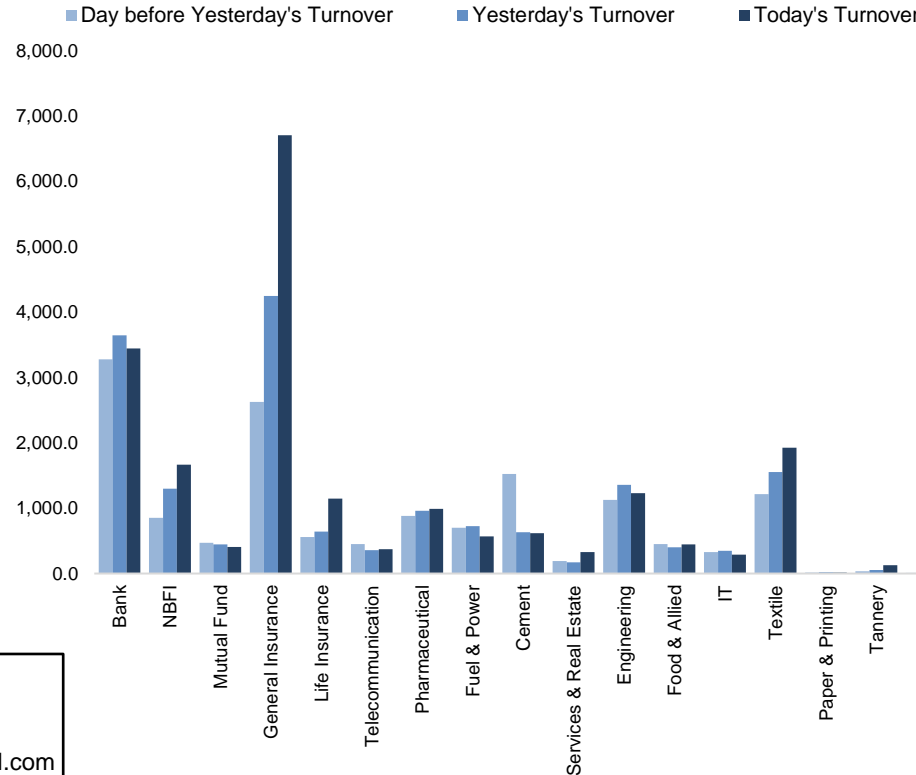
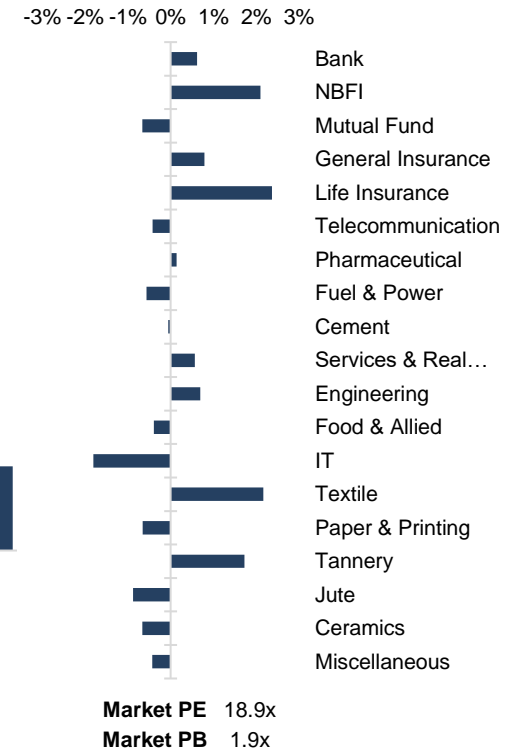


Figure: Sectorial Mcap Change



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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	1,599	1,589	+9.83	+0.62%	31	690,975	15.5%	3,444.2	15.9%	9.0x	0.9x	GP	468,284	10.5%	22.4	13.2x	7.7x
NBFI	2,077	2,034	+42.73	+2.10%	23	204,061	4.6%	1,663.3	7.7%	44.0x	3.2x	WALTONHIL	388,445	8.7%	78.4	38.9x	6.8x
Mutual Fund	1,003	1,010	-6.68	-0.66%	37	45,271	1.0%	406.5	1.9%	NM	0.9x	BATBC	294,084	6.6%	229.4	25.1x	7.8x
General Insurance	5,320	5,278	+41.62	+0.79%	38	137,597	3.1%	6,704.2	31.0%	25.9x	2.6x	ROBI	245,135	5.5%	231.9	NM	3.7x
Life Insurance	2,530	2,471	+58.64	+2.37%	12	69,166	1.5%	1,144.9	5.3%	NM	NM	SQURPHARMA	188,194	4.2%	110.4	13.0x	2.2x
Telecommunication	6,320	6,347	-26.64	-0.42%	3	742,492	16.6%	370.0	1.7%	19.1x	5.5x	UPGDCL	160,460	3.6%	40.7	16.6x	5.3x
Pharmaceutical	3,356	3,351	+4.78	+0.14%	31	611,368	13.7%	991.1	4.6%	20.1x	2.5x	RENATA	123,944	2.8%	89.2	27.0x	5.1x
Fuel & Power	1,700	1,710	-9.69	-0.57%	22	454,668	10.2%	569.7	2.6%	12.4x	1.4x	ICB	87,350	2.0%	25.7	42.2x	2.0x
Cement	2,009	2,011	-1.07	-0.05%	7	117,981	2.6%	618.5	2.9%	20.7x	2.5x	BERGERPBL	84,069	1.9%	46.8	34.0x	8.6x
Services & Real Estate	1,086	1,080	+6.09	+0.56%	8	42,198	0.9%	327.2	1.5%	NM	0.9x	BXPBARMA	76,374	1.7%	131.4	16.7x	2.1x
Engineering	4,651	4,619	+32.18	+0.70%	42	567,745	12.7%	1,228.2	5.7%	31.2x	2.6x	BEXIMCO	75,188	1.7%	846.1	20.7x	1.1x
Food & Allied	21,327	21,411	-83.90	-0.39%	20	385,882	8.6%	446.9	2.1%	32.8x	8.1x	BRACBANK	70,862	1.6%	52.6	14.7x	1.4x
IT	2,617	2,665	-48.10	-1.80%	11	31,071	0.7%	288.8	1.3%	31.4x	2.2x	LHBL	69,218	1.5%	204.3	24.1x	3.8x
Textile	1,127	1,103	+23.88	+2.17%	56	117,566	2.6%	1,925.5	8.9%	NM	0.8x	MARICO	66,380	1.5%	57.1	21.4x	40.6x
Paper & Printing	5,105	5,139	-33.44	-0.65%	4	14,380	0.3%	16.7	0.1%	38.8x	1.0x	SUMITPOWER	47,307	1.1%	98.1	8.4x	1.3x
Tannery	1,757	1,727	+29.79	+1.72%	6	19,174	0.4%	129.3	0.6%	NM	1.8x	DUTCHBANGL	45,870	1.0%	696.1	8.1x	1.4x
Jute	8,543	8,619	-75.94	-0.88%	3	2,106	0.0%	7.1	0.0%	NM	15.4x	ISLAMIBANK	45,724	1.0%	17.2	9.5x	0.7x
Ceramics	507	510	-3.37	-0.66%	5	25,741	0.6%	78.6	0.4%	55.3x	1.7x	EBL	35,484	0.8%	16.9	7.8x	1.0x
Miscellaneous	3,774	3,791	-16.18	-0.43%	14	190,382	4.3%	1,287.5	5.9%	28.6x	1.9x	OLYMPIC	34,929	0.8%	14.4	16.9x	4.0x
												TITASGAS	34,821	0.8%	14.5	9.6x	0.5x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GLOBALINS	66.4	+18.4%	490.0	48.4x	5.0x
PDL	11.0	+10.0%	90.4	46.2x	0.8x
GSPFINANCE	23.1	+10.0%	219.2	17.2x	1.1x
FORTUNE	23.7	+9.7%	126.2	19.7x	1.7x
SHASHADNIM	21.7	+9.6%	18.9	14.1x	0.5x
RUPALIINS	45.8	+9.6%	411.2	24.5x	2.1x
FEKDIL	12.9	+9.3%	31.4	36.9x	0.7x
ISLAMICFIN	22.1	+8.9%	128.6	14.1x	1.4x
PRIMEFIN	13.1	+8.3%	31.7	93.8x	1.5x
DELTALIFE	112.9	+8.1%	98.5	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	123,135	7.7%	13.0x	2.2x
BATBC	77,785	4.9%	25.1x	7.8x
RENATA	60,510	3.8%	27.0x	5.1x
BXPBARMA	53,325	3.3%	16.7x	2.1x
BEXIMCO	52,218	3.3%	20.7x	1.1x
GP	46,828	2.9%	13.2x	7.7x
BRACBANK	38,095	2.4%	14.7x	1.4x
EBL	24,775	1.6%	7.8x	1.0x
LHBL	24,448	1.5%	24.1x	3.8x
ROBI	24,391	1.5%	NM	3.7x
ISLAMIBANK	22,259	1.4%	9.5x	0.7x
OLYMPIC	21,188	1.3%	16.9x	4.0x
BEACONPHAR	19,759	1.2%	28.0x	5.4x
CITYBANK	19,484	1.2%	6.3x	0.9x
PUBALIBANK	17,542	1.1%	6.9x	0.7x
SUMITPOWER	17,404	1.1%	8.4x	1.3x
NBL	17,141	1.1%	6.9x	0.5x
PRIMEBANK	17,124	1.1%	9.8x	0.9x
UPGDCL	16,046	1.0%	16.6x	5.3x
ALARABANK	14,857	0.9%	11.1x	1.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	85.8	-1.8%	846.1	20.7x	1.1x
DUTCHBANGL	83.4	+5.3%	696.1	8.1x	1.4x
LANKABAFIN	36.8	+6.4%	577.9	20.3x	2.1x
GLOBALINS	66.4	+18.4%	490.0	48.4x	5.0x
RUPALIINS	45.8	+9.6%	411.2	24.5x	2.1x
BDFINANCE	41.3	+6.4%	409.6	21.0x	2.2x
ABBANK	16.3	+0.6%	393.3	29.8x	0.5x
IFADAUTOS	54.6	+1.7%	388.0	59.9x	1.4x
NORTHRNINS	64.5	-7.3%	373.8	38.5x	3.1x
GREENDELTA	102.8	-1.3%	364.4	12.8x	1.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SIBL	13.5	-7.5%	18.9	8.7x	0.7x
ASIAINS	103.6	-7.3%	90.0	35.7x	4.7x
NORTHRNINS	64.5	-7.3%	373.8	38.5x	3.1x
AIBL1STIMF	9.3	-6.1%	12.9	NM	1.0x
BNICL	129.1	-5.8%	11.5	46.6x	6.1x
NFML	33.0	-5.7%	173.6	25.6x	2.6x
ZEALBANGLA	92.7	-4.8%	0.6	NM	NM
EASTERNINS	122.3	-4.8%	12.0	34.9x	2.5x
MBL1STMF	8.7	-4.4%	26.4	NM	1.0x
NRBCBANK	37.2	-4.4%	296.3	15.3x	2.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
ACFL	38.0	38.0	3.8	100	1
AGRANINS	60.0	60.0	6.0	100	1
AMANFEED	40.2	40.2	0.5	13	1
ASIAINS	105.0	105.0	23.3	222	1
BBSCABLES	53.0	53.0	0.5	10	1
BDFINANCE	39.2	37.1	5.8	155	3
BEACONPHAR	117.1	115.0	23.6	205	3
BEXIMCO	91.2	86.4	81.5	937	5
BNICL	133.0	133.0	55.5	417	2
BRACBANK	50.0	50.0	2.5	50	1

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
DACCADYE	15.2	14.8	7.9	527	3
DBH	72.7	72.6	2.2	31	4
DHAKABANK	14.9	14.9	89.4	6,000	1
DUTCHBANGL	76.0	76.0	0.8	10	1
FAREASTLIF	62.8	62.8	0.6	10	1
FEDERALINS	35.0	35.0	0.7	20	1
FORTUNE	23.7	23.0	2.1	89	3
GBBPOWER	36.0	34.7	1.1	32	2
GENEXIL	100.0	94.0	2.4	25	2
GLOBALINS	52.0	52.0	0.5	10	1
HAKKANIPUL	66.6	66.6	0.5	8	1
ISLAMIBANK	28.5	28.5	71.3	2,500	2
ISLAMICFIN	20.5	20.5	0.6	30	1
JAMUNABANK	23.4	23.4	2.0	84	3
KARNAPHULI	42.1	42.1	1.3	30	1
KTL	19.3	19.2	2.9	152	4
LHBL	59.4	59.4	1.8	30	1
LRBDL	45.3	45.3	12.9	285	3
MERCANBANK	15.0	15.0	15.0	1,000	1
MONNOCERA	126.1	126.1	0.5	4	1
MTB	22.8	22.8	30.8	1,350	2
NCCBANK	17.6	17.6	21.1	1,200	2
NEWLINE	21.9	21.9	4.6	208	1
NORTHRNINS	71.0	68.6	7.1	102	5
NPOLYMAR	62.2	51.0	9.6	174	8
NRBCBANK	38.0	36.6	33.0	870	3
OIMEX	22.9	22.9	18.3	800	2
PARAMOUNT	87.0	87.0	1.7	20	1
PF1STMF	11.6	11.3	1.1	100	2
PREMIERBAN	13.0	13.0	130.0	10,000	1
PRIMEBANK	26.2	23.9	107.9	4,419	5
PROGRESLIF	105.0	105.0	5.3	50	1
<b>Total</b>			<b>1,224.5</b>		<b>122</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
NCCBANK	-	7.5%	7.5%	Record Date	03-Jun-21
SOUTHEASTB	-	0.0%	10.0%	Record Date	03-Jun-21
STANDBANKL	-	2.5%	2.5%	Record Date	06-Jun-21
EXIMBANK	-	2.5%	7.5%	Record Date	06-Jun-21
FIRSTSBANK	-	5.0%	5.0%	Record Date	06-Jun-21

**Important DSE News**
**FAFIN**

Bangladesh Securities and Exchange Commission has nominated 05 (five) distinguished individuals/persons as Independent Directors of the Company in accordance with condition under 1 of the commission's Notification No. SEC/CMRRCD/2009-193/15 dated December 10, 2020. Mr. Mohammad Nurul Amin, Former MD & CEO, NCC Bank Ltd. and Meghna Bank Ltd; Mr. Dr. Muhammad Saifuddin Khan, Associate Professor, Department of Finance, University of Dhaka; Mr. Brigadier General Abu Sayed Mohammad Ali, ndu,afwc,psc,MDS,MBA,MSS, Mphil (LPR); Mr. Syed Abdullah Al Mamun, Ph.D, FCMA, CSRS, Deputy CEO of CRISL; Mr. Salim, Faculty Member BICM. along with two nominated directors from P&L International Limited and Reptiles Farm Ltd. whereas, Mr. Mohammad Nurul Amin, Former MD & CEO, NCC Bank Ltd. and Meghna Bank Ltd. is proposed to be selected as the Chairman of the new Board of Directors of the company.

**FSB**

Bangladesh Securities and Exchange Commission has reconstituted the Board of Fareast Stocks and Bonds Limited (DSE TREC Holder No. 226) and nominated the following distinguished individuals/persons as Independent Directors and shareholder Directors of the Company in accordance with non-compliance of commission's Notification No. SEC/CMRRCD/2009-193/07/Admin/106 dated September 01, 2020. Independent Directors: Mr. AKM Shahidul Hoque, Ex. IGP, Bangladesh Police; Mr. Muhammad Shahin Miah, Phd, CPA, Associate Professor, University of Dhaka; Dr. Rumana Islam, Professor, University of Dhaka; Mr. Md. Nazmul Hasan, Assistant Professor, University of Dhaka. Shareholder Directors: Mr. Wahid Murad Jamil, Shareholder or representative from shareholder; Mr. Asrafuzaman Chowdhury, shareholder or representative from shareholder; Mr. Mostassem Belal, shareholder or representative from shareholder; Managing Director, Fareast Finance and Investment Ltd. and Mr. AKM Shahidul Hoque; and Mr. AKM Shahidul Hoque; Ex. IGP, Bangladesh Police is hereby nominated as the Chairman of the new board of directors of Fareast Stocks & Bonds Limited.

**JAMUNAOIL**

(Q3 Un-audited): Referring to their earlier news disseminated on 27.05.2021 regarding Q3 Financials, the Company has further informed that NOCFPS for July 2020-March 2021 would be Tk. 87.67 instead of Tk. 88.05. The Company earlier mistakenly reported the NOCFPS figure as mention above. Other information of the earlier disclosure will remain unchanged.

**GLOBALINS**

The auditor of the Global Insurance Company Ltd has given the "Emphasis of Matter" paragraphs in the Auditor's Report for the year ended on 31 December 2020. Emphasis of Matter: a) Agents License: A total 115 numbers of Agents were working in the Company during the year under audit of which 105 Agents with renewal licenses, remaining 10 agents license were yet to get the renewal from Insurance Development & Regulatory Authority. b) Gratuity Fund & WPPF: The Company yet to make any provision against gratuity fund for its employees. On the other also no provision has been made for WPPF, though the Company made payment during the year 2019 against provision of earlier years. c) COVID -19: Financial Statements of the Company shows the overall impact of COVID-19 pandemic on the Company's business and financial statements.

(Q1 Un-audited): EPS was Tk. 1.02 for January-March 2021 as against Tk. 1.00 for January-March 2020. NOCFPS was Tk. 1.70 for January-March 2021 as against Tk. 1.57 for January-March 2020. NAV per share was Tk. 13.77 as on March 31, 2021 and Tk. 12.69 as on March 31, 2020.

The Board of Directors has recommended 10% cash dividend for the year ended on December 31, 2020. Date of AGM: 14.08.2021, Time: 11:00 AM, Venue: Digital Platform. Record Date: 22.06.2021. The Company has also reported EPS of Tk. 1.53, NAV per share of Tk. 12.75 and NOCFPS of Tk. 4.89 for the year ended on December 31, 2020 as against Tk. 0.96 (restated), Tk. 11.69 (restated) and Tk. 3.45 (restated) respectively for the same period of the previous year.

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**BSCCL**

The company has informed that some national print and electronic media have recently published articles regarding the possibility of shortage in submarine cable bandwidth capacity in Bangladesh in the near future, before the inauguration of SMW-6 submarine cable in Bangladesh. In this regard, BSCCL would like to inform that as a government owned responsible company, BSCCL is always committed in fulfilling the demand for submarine cable capacity in the country. As such, different ongoing process is regularly followed up with action plan to meet the projected bandwidth demand in the country. Owing to the various upgradations lined up for SMW-4 and SMW-5 submarine cables, BSCCL expects to fully meet the national demand for submarine cable capacity in the country till the launch of SMW-6. Hence, BSCCL believes that the concerns expressed in various media outlets regarding the shortage of submarine cable capacity in the country in near future will be dispelled. For more information regarding the above stated issues you are requested to visit the website of BSCCL, i.e. <http://www.bsccl.com/>

**BATASHOE**

(Q1 Un-audited): EPS was Tk. (3.58) for January-March 2021 as against Tk. 2.07 for January-March 2020. NOCFPS was Tk. 19.71 for January-March 2021 as against Tk. (5.88) for January-March 2020. NAV per share was Tk. 264.35 as on March 31, 2021 and Tk. 267.94 as on December 31, 2020. Reason for Significant deviation in EPS and NOCFPS: 1) EPS decreased for lower profit after tax compare to the same period of the last year driven by discounted sales and increased unavoidable expenses at the same time due to the 2nd wave of Covid-19. 2) NOCFPS increased compare to last year mainly for increased of business.

The Board of Directors has recommended 25% cash Dividend from the retained earnings for the year ended on December 31, 2020. Date of AGM: 12.08.2021, Time: 11:00 AM, Venue: Digital Platform. Record Date: 22.06.2021. The Company has also reported EPS of Tk. (96.94), NAV per share of Tk. 267.94 and NOCFPS of Tk. 2.26 for the year ended on December 31, 2020 as against Tk. 36.11, Tk. 364.65 and Tk. 68.66 respectively for the same period of the previous year. The Company has also informed that Bata Bangladesh has been going through a crisis overall business in 2020, which has pushed the Company's earnings down. The earnings from the Company's business took a drastic fall due to the loss of retail business during the major festivals of 2020 Eid-ul-Fitr, Eid-ul-Azha, Puja, and Pohela Boishakh due to countrywide lockdown for the Covid-19 pandemic which covers 25% to 30% of the Company's yearly business. An estimated 77% of the rural business leader like dealer and/or wholesaler has been particularly impacted due to COVID-19 which led to losing their business, resulting first time in the Company's business history the Company's business has gone down by 41% in the year ended 31 December 2020.

**ORIONPHARM**

The Company has informed that Orion Power Meghnaghat Limited and Dutch Bangla Power & Associates Limited are the subsidiary Companies of Orion Pharma Limited. The contract between Bangladesh Power Development Board and Orion Power Meghnaghat Limited for supplying electricity to the national grid has expired in May 2021 and Dutch Bangla Power & Associates Limited will be expired in July 2021. The company also has informed that, in this regard, they have applied to the Government of Bangladesh to extend the contract period for supplying electricity for another 5 (five) years and the renewal of contract of both power plants are under process.

**ASIANS**

(Q1 Un-audited): EPS was Tk. 0.74 for January-March 2021 as against Tk. 0.60 for January-March 2020. NOCFPS was Tk. 3.59 for January-March 2021 as against Tk. 2.09 for January-March 2020. NAV per share was Tk. 25.14 as on March 31, 2021 and Tk. 20.09 as on March 31, 2020.

The Board of Directors has recommended 12% cash for the year ended on December 31, 2020. Date of AGM: 02.08.2021, Time: 12:00 noon. Venue: Digital Platform. Record Date: 22.06.2021. The Company has also reported EPS of Tk. 2.34, NAV per share of Tk. 20.62 and NOCFPS of Tk. 5.99 for the year ended on December 31, 2020 as against Tk. 1.60, Tk. 19.50 and Tk. 2.71 respectively for the same period of the previous year.