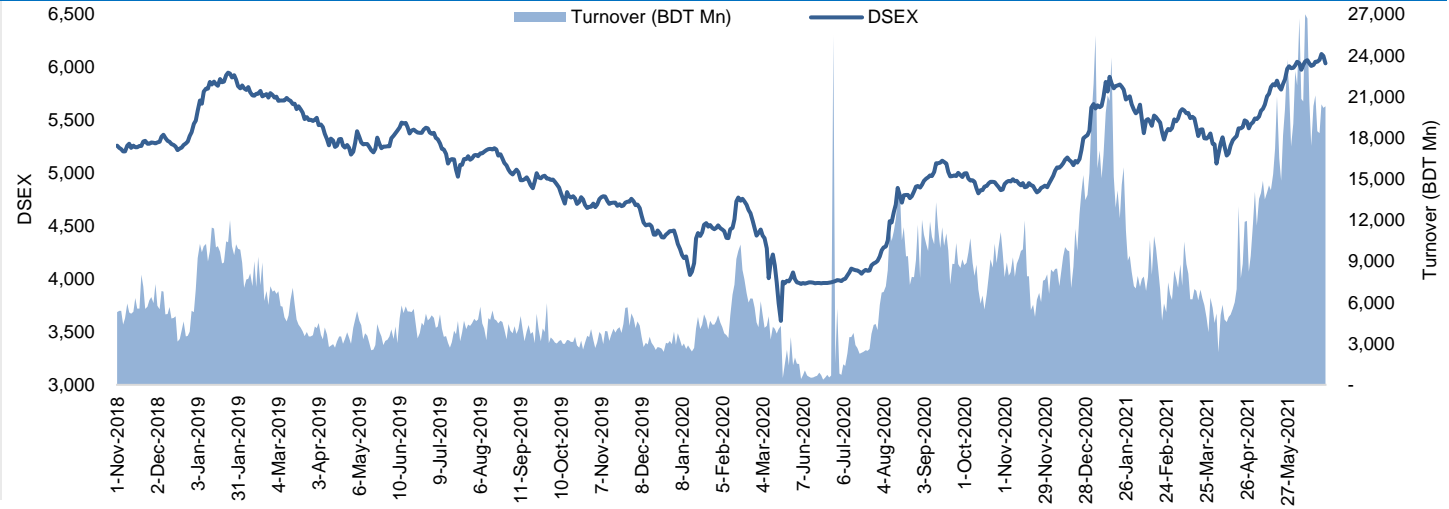


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.14%) lost 69.89 points and closed at 6,035.84. The blue-chip index DS30 (-0.76%), the Shariah-based index DSES (-0.53%), and the large-cap index CDSET (-0.75%) closed at 2,188.83, 1,297.39, and 1,220.11 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 1.42% followed by Engineering (-1.25%), Fuel & Power (-0.83%), Food & Allied (-0.46%), NBF1 (-0.44%), Pharmaceutical (-0.28%), and Telecommunication (-0.13%), respectively. Block trades contributed 5.6% of the overall market turnover. Bangladesh Export Import Company Ltd. (-0.7%) was the most traded share with a turnover of BDT 1,601 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,035.84	6,105.73	-69.89	-1.14%	+11.7%
DS30	2,188.83	2,205.70	-16.87	-0.76%	+11.4%
DSES	1,297.39	1,304.31	-6.91	-0.53%	+4.5%
CDSET	1,220.11	1,229.38	-9.27	-0.75%	+8.6%

	Advanced	Declined	Unchanged	Total
All Category	133	217	22	372
A Category (Equity)	92	169	9	270
B Category (Equity)	25	28	6	59
N Category (Equity)	1	10	0	11
Z Category (Equity)	15	10	7	32
Mutual Funds	36	0	0	36
Corporate Bonds	0	2	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,082,554	5,124,629	-0.8%
	Mn USD	59,823	60,318	
Turnover	Mn BDT	20,300	20,176	+0.6%
	Mn USD	239	237	
Volume	Mn Shares	757	659	+14.9%
No. of Trade		322,583	311,479	+3.6%

Figure: Sectorial Turnover (BDT Mn)

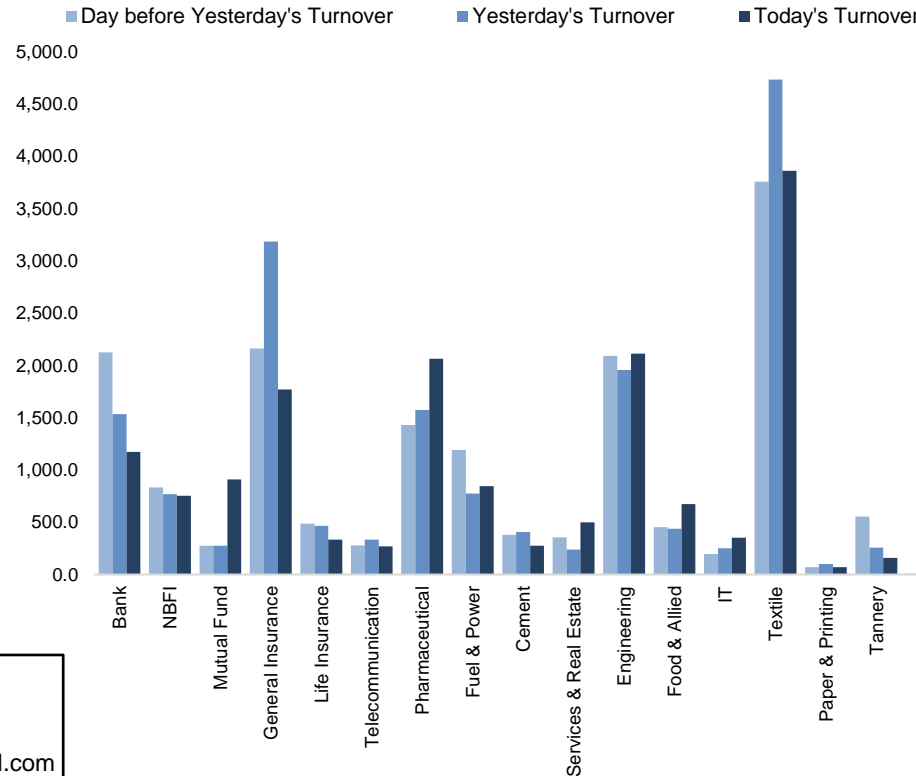
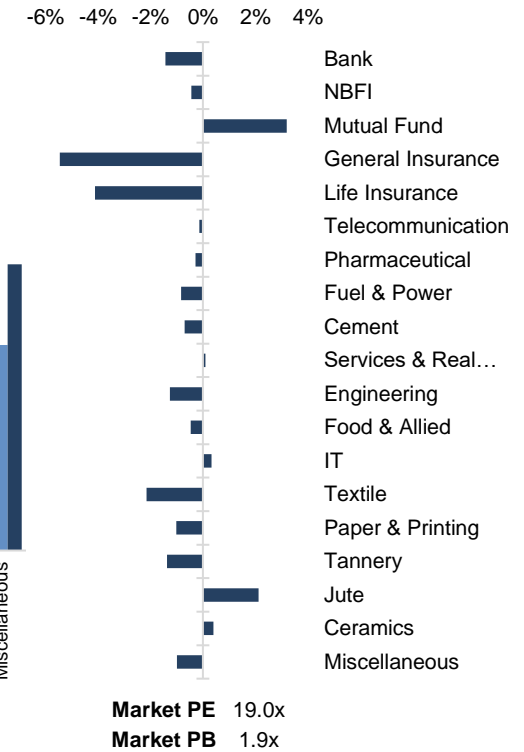


Figure: Sectorial Mcap Change



Market PE 19.0x  
Market PB 1.9x

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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	1,496	1,517	-21.60	-1.42%	31	646,289	14.4%	1,173.1	6.1%	8.6x	0.8x	GP	468,419	10.4%	34.0	13.2x	7.7x
NBFI	2,077	2,086	-9.27	-0.44%	23	204,021	4.5%	753.3	3.9%	44.0x	3.2x	WALTONHIL	405,409	9.0%	39.5	40.6x	7.1x
Mutual Fund	1,042	1,009	+32.27	+3.20%	37	47,013	1.0%	909.2	4.7%	NM	0.9x	BATBC	290,520	6.5%	128.2	24.8x	7.7x
General Insurance	5,301	5,607	-305.56	-5.45%	38	137,114	3.0%	1,770.5	9.2%	25.7x	2.6x	ROBI	233,088	5.2%	151.7	NM	3.5x
Life Insurance	2,510	2,618	-107.62	-4.11%	12	68,630	1.5%	333.3	1.7%	NM	NM	SQURPHARMA	188,903	4.2%	162.6	13.0x	2.2x
Telecommunication	6,209	6,218	-8.23	-0.13%	3	729,508	16.2%	269.0	1.4%	18.8x	5.4x	UPGDCL	159,242	3.5%	38.0	16.5x	5.3x
Pharmaceutical	3,450	3,460	-9.72	-0.28%	31	628,623	14.0%	2,064.3	10.8%	20.7x	2.6x	RENATA	126,809	2.8%	14.9	27.6x	5.2x
Fuel & Power	1,695	1,710	-14.22	-0.83%	22	453,356	10.1%	846.2	4.4%	12.3x	1.4x	ICB	90,171	2.0%	24.7	43.5x	2.0x
Cement	1,998	2,012	-13.98	-0.69%	7	117,310	2.6%	274.9	1.4%	20.6x	2.5x	BEXIMCO	83,984	1.9%	1,601.4	23.1x	1.3x
Services & Real Estate	1,100	1,099	+1.11	+0.10%	8	42,727	0.9%	499.0	2.6%	NM	0.9x	BERGERPBL	81,996	1.8%	9.3	33.2x	8.4x
Engineering	4,928	4,991	-62.57	-1.25%	42	601,623	13.4%	2,113.0	11.0%	29.9x	2.8x	BXPBARMA	78,560	1.7%	92.9	17.2x	2.2x
Food & Allied	21,212	21,309	-97.84	-0.46%	20	383,798	8.5%	673.9	3.5%	32.7x	8.1x	MARICO	69,250	1.5%	19.2	22.3x	42.3x
IT	2,697	2,688	+8.84	+0.33%	11	32,025	0.7%	351.5	1.8%	29.6x	2.3x	LHBL	66,431	1.5%	122.5	23.2x	3.6x
Textile	1,352	1,382	-29.75	-2.15%	58	142,841	3.2%	3,861.1	20.2%	NM	0.9x	BRACBANK	66,128	1.5%	32.8	13.7x	1.3x
Paper & Printing	5,055	5,106	-51.47	-1.01%	6	14,481	0.3%	70.3	0.4%	38.9x	1.0x	DUTCHBANGL	46,365	1.0%	112.4	8.2x	1.4x
Tannery	1,988	2,016	-27.47	-1.36%	6	21,698	0.5%	158.3	0.8%	NM	2.2x	SUMITPOWER	46,239	1.0%	86.0	8.2x	1.3x
Jute	8,025	7,859	+166.84	+2.12%	3	1,979	0.0%	14.3	0.1%	NM	14.4x	ISLAMIBANK	44,919	1.0%	7.3	9.3x	0.7x
Ceramics	531	528	+2.11	+0.40%	5	26,934	0.6%	286.2	1.5%	57.7x	1.8x	TITASGAS	34,524	0.8%	24.6	9.6x	0.5x
Miscellaneous	3,967	4,007	-39.72	-0.99%	14	200,085	4.4%	2,736.7	14.3%	30.1x	2.0x	OLYMPIC	34,389	0.8%	22.1	16.6x	3.9x
												UNILEVERCL	33,199	0.7%	2.8	70.4x	22.4x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONNOCERA	122.5	+10.0%	91.0	NM	2.1x
MONOSPOOL	117.5	+9.9%	0.1	NM	2.9x
MONNOFABR	23.3	+9.9%	60.9	NM	0.9x
TAMIJTEX	27.9	+9.8%	0.0	93.0x	0.3x
PAPERPROC	37.2	+9.7%	0.0	93.0x	1.4x
MALEKSPIN	31.6	+9.7%	42.8	NM	0.7x
ICBAMCL2ND	11.3	+9.7%	61.2	NM	1.8x
EXIM1STMF	7.9	+8.2%	83.6	NM	0.8x
FARCHEM	11.0	+7.8%	136.9	NM	0.8x
CENTRALPHL	13.6	+7.1%	104.8	NM	2.0x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	123,599	7.7%	13.0x	2.2x
BATBC	76,843	4.8%	24.8x	7.7x
RENATA	61,908	3.8%	27.6x	5.2x
BEXIMCO	58,327	3.6%	23.1x	1.3x
BXPBARMA	54,851	3.4%	17.2x	2.2x
GP	46,842	2.9%	13.2x	7.7x
BRACBANK	35,551	2.2%	13.7x	1.3x
LHBL	23,463	1.5%	23.2x	3.6x
ROBI	23,192	1.4%	NM	3.5x
EBL	22,444	1.4%	7.0x	0.9x
ISLAMIBANK	21,867	1.4%	9.3x	0.7x
OLYMPIC	20,861	1.3%	16.6x	3.9x
BEACONPHAR	19,775	1.2%	28.0x	5.4x
CITYBANK	18,266	1.1%	5.9x	0.9x
SUMITPOWER	17,011	1.1%	8.2x	1.3x
PUBALIBANK	16,978	1.1%	6.7x	0.6x
NBL	16,295	1.0%	6.6x	0.4x
UPGDCL	15,924	1.0%	16.5x	5.3x
PRIMEBANK	15,190	0.9%	8.7x	0.8x
ALARABANK	13,557	0.8%	10.1x	1.0x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	93.5	-0.7%	1,601.4	23.1x	1.3x
NFML	41.6	+1.2%	667.1	32.2x	3.2x
MAKSONSPIN	19.3	-8.5%	493.1	26.4x	1.0x
DSSL	18.1	-4.2%	470.8	16.9x	1.0x
KTL	30.1	+3.4%	411.0	30.1x	1.8x
SSSTEEL	20.5	+3.0%	303.9	10.8x	1.2x
SEAPEARL	50.9	+6.9%	258.5	66.8x	4.5x
ORIONPHARM	57.0	-3.7%	237.5	20.9x	0.8x
QUEENSOUTH	29.5	+0.3%	216.7	49.3x	1.9x
KEYACOSMET	7.9	-	214.7	NM	0.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PIONEERINS	164.4	-9.8%	183.1	22.1x	3.4x
AIL	39.5	-9.8%	97.7	21.7x	1.9x
PRIMELIFE	67.0	-9.1%	21.5	NM	NM
PRAGATIINS	102.1	-8.8%	89.7	26.6x	2.0x
GLOBALINS	60.5	-8.7%	54.7	39.0x	4.4x
PRAGATILIF	113.3	-8.6%	21.0	NM	NM
MAKSONSPIN	19.3	-8.5%	493.1	26.4x	1.0x
METROSPIN	18.3	-8.5%	99.0	21.1x	2.2x
SONARBAINS	85.0	-8.2%	135.0	37.1x	4.0x
RELIANCINS	95.1	-7.9%	58.4	17.8x	1.5x

Block Trade (Top 35)	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
ACI	263.9	263.9	303.5	1,150	1
MALEKSPIN	31.6	29.0	163.1	5,493	28
BDFINANCE	47.2	47.0	99.2	2,106	3
STANDARINS	78.5	78.5	94.8	1,208	1
BATBC	540.0	540.0	81.0	150	1
RENATA	1,301.0	1,301.0	57.4	44	1
SALVOCHEM	35.2	33.0	55.1	1,570	13
BEXIMCO	100.0	96.0	41.3	429	5
BXPBARMA	162.3	162.3	32.5	200	1
LANKABAFIN	38.9	37.8	26.5	700	2

Block Trade (Top 35)	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity (‘000)	No. of Trade
MARICO	2,200.0	2,200.0	15.8	7	1
PHOENIXFIN	31.9	31.9	14.7	460	1
BRACBANK	48.0	48.0	14.4	300	2
ASIAINS	105.8	105.7	13.8	131	3
SQURPHARMA	214.0	214.0	10.7	50	1
QUEENSOUTH	32.3	32.3	9.9	305	1
DELTALIFE	118.0	115.0	8.6	74	2
IFADAUTOS	53.5	53.5	8.0	150	1
KTL	30.1	29.0	7.5	250	2
UTTARABANK	23.3	23.3	7.3	315	1
EASTERNINS	119.0	119.0	6.8	57	3
OLYMPIC	172.5	172.5	5.9	34	1
AIL	43.8	41.0	5.8	138	6
GREENDELT	118.0	114.0	5.7	50	3
EHL	53.0	53.0	5.3	100	1
RUPALIINS	45.0	45.0	5.0	111	1
BNICL	129.0	127.0	3.8	30	2
GENEXIL	94.0	94.0	3.8	40	1
MAKSONSPIN	21.2	21.2	3.7	175	1
NRBCBANK	36.4	35.9	3.5	97	3
INDEXAGRO	120.0	115.0	3.1	27	2
FORTUNE	50.0	50.0	2.8	56	2
ADVENT	28.2	28.2	2.0	70	1
SAIFPOWER	24.0	24.0	1.8	77	1
SALAMCRST	35.7	35.7	1.8	50	1
<b>Total</b>			<b>1,142.3</b>		<b>120</b>

**Important DSE News**
**MALEKSPIN**

In response to DSE Query dated June 22, 2021 regarding undisclosed PSI, if any, for recent unusual price and volume hike, the company has informed that a Board Meeting of the Company was held on June 22, 2021 and the Board has approved a proposal of BMRE of the existing project of the Company. They also informed that before holding the Board Meeting dated 22-06-2021, they did not have any material information for disclosure to the shareholders and regulatory agencies.

The Company has informed that the Board of Directors has approved the proposal for BMRE of the existing project and installing a new plant at Bhaluka, Mymensingh of the company along with land & factory building, civil constructions & others, Machinery and Equipments at an estimated total investment of Tk. 213.19 crores. The existing production capacity of the company is 35,000 Kgs. yarn per day i.e. 12,600,000 Kgs. yarn per annum with 63,624 Spindles.

After BMRE, it is expected that Spindles will be 79,464 and 2,000 Rotor Open end and production and sales revenue will increase by 60% & profitability will also increase substantially. This BMRE will create value addition due to improvement of product quality which will enable the company to sell its products at higher prices and retain better margin. The proposed BMRE may be implemented by funds from internal generations as well as taking loan from Banks & other sources.

**SAMATALETH**

(Q2 Un-audited): EPS was Tk. 0.02 for October-December 2020 as against Tk. 0.05 for October-December 2019; EPS was Tk. (0.01) for July-December 2020 as against Tk. (0.04) for July-December 2019. NOCFPS was Tk. 0.25 for July-December 2020 as against Tk. 0.28 for July-December 2019. NAV per share was Tk. 14.32 as on December 31, 2020 and Tk. 14.39 as on June 30, 2020.

**UTTARABANK**

Mrs. Badrunnessa Sharmin Islam, one of the Nominated Directors (Nominated from Wealthmax Asset Management Ltd.) of the Company, has expressed her intention to buy 8,99,865 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days.

**RUPALIBANK**

The auditor of the Rupali Bank Ltd. has given the "Emphasis of Matter" paragraphs in the Auditor's Report for the year ended on 31 December 2020. Emphasis of Matter: As per Bangladesh Bank guidelines on Risk Based capital adequacy (Revised regulatory capital framework for banks in line with Basel III), Section 3.2(iii) instructs that all banks will be required to maintain the Minimum Capital to Risk Weighted Assets Ratio (CRAR) of 10% of the total Risk Weighted Assets (RWA). The group maintained CRAR of BDT 27,205,793,872 against required CRAR of BDT 34,256,100,600 with a shortfall of BDT 7,050,306,728 which is 7.94% instead of 10%. The bank maintained CRAR of BDT 26,993,629,419 against required CRAR of BDT 33,700,876,600 with a shortfall of BDT 6,707,247,181 which is 8.01% instead of 10%.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
REPUBLIC	-	7.0%	7.0%	Record Date	24-Jun-21
KARNAPHULI	-	0.0%	10.0%	Record Date	27-Jun-21
AMBEEPHA	-	0.0%	15.0%	Record Date	28-Jun-21

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