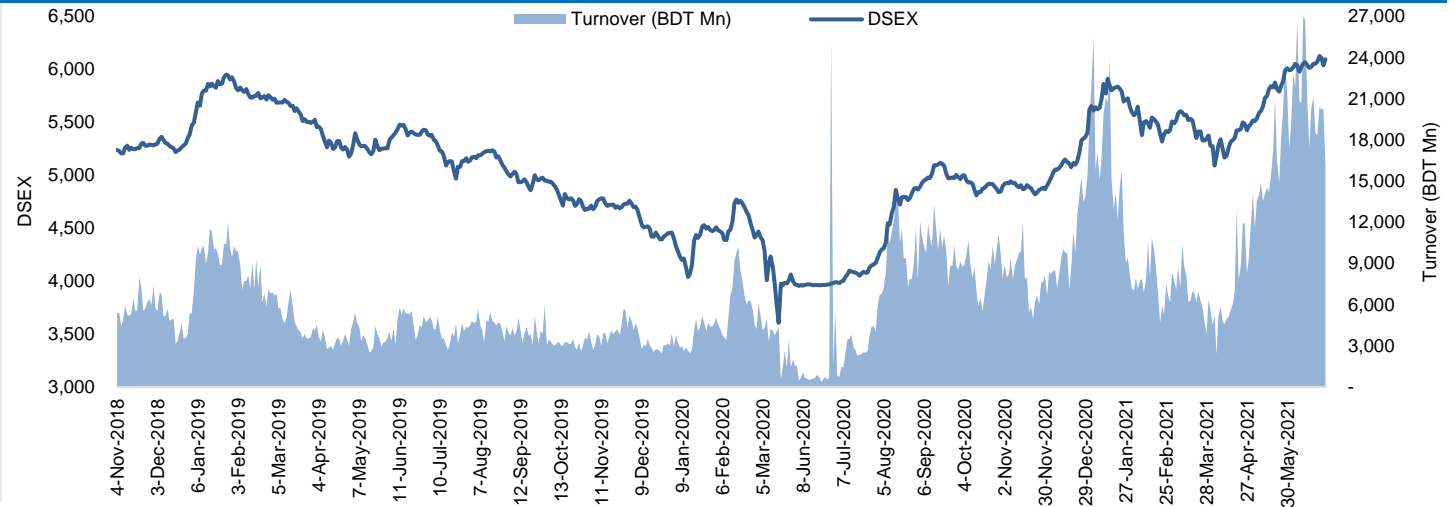


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.94%) gained 57 points and closed at 6,092.84. The blue-chip index DS30 (+0.49%), the Shariah-based index DSES (+0.34%), and the large-cap index CDSET (+0.56%) closed at 2,199.53, 1,301.86, and 1,226.92 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 2.76% followed by Fuel & Power (+0.23%), Food & Allied (+0.22%), Pharmaceutical (+0.19%). Engineering experienced the highest loss of 0.73% followed by Telecommunication (-0.41%), NBFi (-0.09%). Block trades contributed 2.5% of the overall market turnover. Bangladesh Export Import Company Ltd. (-0.9%) was the most traded share with a turnover of BDT 1,336 million.

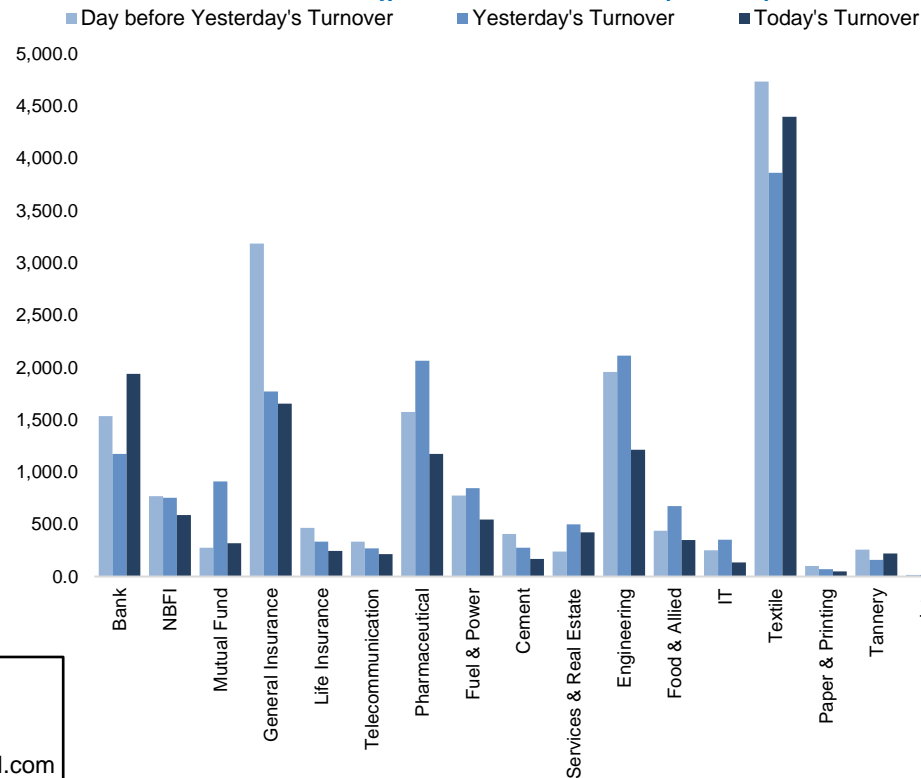
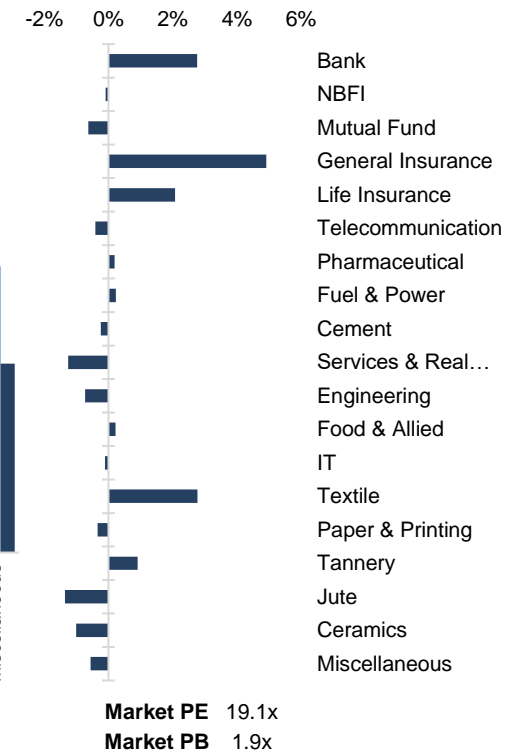


Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,092.84	6,035.84	+57.00	+0.94%	+12.8%
DS30	2,199.53	2,188.83	+10.69	+0.49%	+12.0%
DSES	1,301.86	1,297.39	+4.47	+0.34%	+4.8%
CDSET	1,226.92	1,220.11	+6.81	+0.56%	+9.3%

	Advanced	Declined	Unchanged	Total
All Category	191	152	29	372
A Category (Equity)	139	110	21	270
B Category (Equity)	25	31	3	59
N Category (Equity)	8	3	0	11
Z Category (Equity)	19	8	5	32
Mutual Funds	7	21	8	36
Corporate Bonds	2	0	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,106,388	5,082,554	+0.5%
	Mn USD	60,103	59,823	
Turnover	Mn BDT	15,980	20,300	-21.3%
	Mn USD	188	239	
Volume	Mn Shares	551	757	-27.2%
No. of Trade		254,961	322,583	-21.0%

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Figure: Sectorial Turnover (BDT Mn)

Figure: Sectorial Mcap Change


Market PE 19.1x
Market PB 1.9x

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	1,537	1,496	+41.34	+2.76%	31	664,152	14.7%	1,936.5	12.4%	8.7x	0.8x	GP	467,474	10.3%	50.4	13.2x	7.7x
NBFI	2,075	2,077	-1.84	-0.09%	23	203,840	4.5%	586.1	3.8%	44.0x	3.2x	WALTONHIL	401,259	8.9%	42.4	40.2x	7.0x
Mutual Fund	1,035	1,042	-6.51	-0.63%	37	46,719	1.0%	316.9	2.0%	NM	0.9x	BATBC	291,168	6.4%	112.6	24.8x	7.7x
General Insurance	5,562	5,301	+260.99	+4.92%	38	143,864	3.2%	1,652.7	10.6%	26.9x	2.7x	ROBI	230,993	5.1%	119.5	NM	3.5x
Life Insurance	2,563	2,510	+52.12	+2.08%	12	70,055	1.5%	245.9	1.6%	NM	NM	SQURPHARMA	188,903	4.2%	119.1	13.0x	2.2x
Telecommunication	6,184	6,209	-25.46	-0.41%	3	726,517	16.1%	214.4	1.4%	18.7x	5.4x	UPGDCL	159,532	3.5%	14.1	16.5x	5.3x
Pharmaceutical	3,457	3,450	+6.63	+0.19%	31	629,832	13.9%	1,171.3	7.5%	20.7x	2.6x	RENATA	127,267	2.8%	12.7	27.7x	5.2x
Fuel & Power	1,699	1,695	+3.83	+0.23%	22	454,380	10.0%	544.8	3.5%	12.4x	1.4x	ICB	90,010	2.0%	12.3	43.5x	2.0x
Cement	1,993	1,998	-4.74	-0.24%	7	117,031	2.6%	168.2	1.1%	20.5x	2.5x	BEXIMCO	83,266	1.8%	1,335.9	22.9x	1.3x
Services & Real Estate	1,086	1,100	-13.80	-1.25%	8	42,191	0.9%	423.6	2.7%	NM	0.9x	BERGERPBL	81,722	1.8%	18.3	33.1x	8.4x
Engineering	4,893	4,928	-35.87	-0.73%	42	597,244	13.2%	1,213.6	7.8%	29.7x	2.7x	BXPBARMA	78,560	1.7%	131.7	17.2x	2.2x
Food & Allied	21,259	21,212	+47.58	+0.22%	20	384,659	8.5%	348.1	2.2%	32.7x	8.1x	MARICO	69,624	1.5%	9.6	22.4x	42.5x
IT	2,694	2,697	-2.87	-0.11%	11	31,991	0.7%	134.7	0.9%	29.6x	2.3x	BRACBANK	67,799	1.5%	26.9	14.0x	1.3x
Textile	1,390	1,352	+37.58	+2.78%	58	146,811	3.2%	4,395.2	28.2%	NM	1.0x	LHBL	66,547	1.5%	74.5	23.2x	3.6x
Paper & Printing	5,037	5,055	-17.28	-0.34%	6	14,432	0.3%	50.0	0.3%	38.8x	1.0x	DUTCHBANGL	50,985	1.1%	300.6	9.0x	1.5x
Tannery	2,006	1,988	+18.05	+0.91%	6	21,895	0.5%	220.1	1.4%	NM	2.2x	SUMITPOWER	46,773	1.0%	43.2	8.3x	1.3x
Jute	7,917	8,025	-108.51	-1.35%	3	1,952	0.0%	7.2	0.0%	NM	14.2x	ISLAMIBANK	45,080	1.0%	32.1	9.3x	0.7x
Ceramics	525	531	-5.33	-1.00%	5	26,664	0.6%	149.7	1.0%	57.1x	1.8x	TITASGAS	34,524	0.8%	11.0	9.6x	0.5x
Miscellaneous	3,945	3,967	-22.17	-0.56%	14	198,967	4.4%	1,805.2	11.6%	29.9x	2.0x	OLYMPIC	34,330	0.8%	24.6	16.6x	3.9x
												UNILEVERCL	33,386	0.7%	0.6	70.8x	22.5x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
RELIANCINS	104.6	+10.0%	59.5	19.6x	1.7x
KTL	33.1	+10.0%	317.7	33.0x	1.9x
DUTCHBANGL	92.7	+10.0%	300.6	9.0x	1.5x
MONOSPOOL	129.2	+10.0%	0.4	NM	3.1x
PAPERPROC	40.9	+9.9%	0.0	NM	1.5x
GREENDELT	118.5	+9.9%	129.1	14.8x	1.7x
MONNOFABR	25.6	+9.9%	45.1	NM	0.9x
SONARGAON	24.6	+9.8%	17.4	NM	1.1x
MALEKSPIN	34.7	+9.8%	1,076.4	NM	0.8x
ESQUIRENIT	40.4	+9.8%	242.9	29.1x	1.1x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	123,599	7.6%	13.0x	2.2x
BATBC	77,014	4.7%	24.8x	7.7x
RENATA	62,132	3.8%	27.7x	5.2x
BEXIMCO	57,828	3.6%	22.9x	1.3x
BXPBARMA	54,851	3.4%	17.2x	2.2x
GP	46,747	2.9%	13.2x	7.7x
BRACBANK	36,449	2.2%	14.0x	1.3x
LHBL	23,504	1.4%	23.2x	3.6x
ROBI	22,984	1.4%	NM	3.5x
EBL	22,843	1.4%	7.2x	0.9x
ISLAMIBANK	21,945	1.4%	9.3x	0.7x
OLYMPIC	20,824	1.3%	16.6x	3.9x
BEACONPHAR	20,519	1.3%	29.0x	5.6x
CITYBANK	18,624	1.1%	6.0x	0.9x
NBL	17,353	1.1%	7.0x	0.5x
SUMITPOWER	17,208	1.1%	8.3x	1.3x
PUBALIBANK	17,049	1.0%	6.7x	0.6x
UPGDCL	15,953	1.0%	16.5x	5.3x
PRIMEBANK	15,881	1.0%	9.1x	0.9x
IFIC	13,746	0.8%	18.0x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	92.7	-0.9%	1,335.9	22.9x	1.3x
MALEKSPIN	34.7	+9.8%	1,076.4	NM	0.8x
QUEENSOUTH	32.1	+8.8%	762.2	53.6x	2.0x
KTL	33.1	+10.0%	317.7	33.0x	1.9x
DUTCHBANGL	92.7	+10.0%	300.6	9.0x	1.5x
ABBANK	14.9	+8.0%	289.6	27.2x	0.5x
MAKSONSPIN	20.1	+4.1%	247.2	27.5x	1.0x
ESQUIRENIT	40.4	+9.8%	242.9	29.1x	1.1x
SAIFPOWER	23.2	-3.7%	207.4	27.5x	1.4x
IFIC	12.8	+3.2%	199.7	18.0x	0.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SEAPEARL	46.6	-8.4%	60.0	61.1x	4.2x
ARAMIT	308.1	-5.3%	6.5	NM	2.1x
CNATEX	3.7	-5.1%	15.4	NM	0.2x
SAMATALETH	72.6	-4.8%	10.2	NM	5.0x
WMSHIPYARD	11.5	-4.2%	43.5	13.7x	0.5x
GEMINISEA	150.6	-3.8%	4.6	NM	NM
SAIFPOWER	23.2	-3.7%	207.4	27.5x	1.4x
NORTHRNINS	60.6	-3.7%	71.3	36.2x	2.9x
ILFSL	5.3	-3.6%	8.2	NM	NM
HWAWELLTEX	41.6	-3.3%	3.9	24.5x	1.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
ABBANK	13.3	13.3	1.0	77	1
AMANFEED	57.5	57.5	0.6	10	1
BATBC	526.1	526.1	11.6	22	1
BAYLEASING	27.9	27.9	1.5	55	1
BEACONPHAR	125.7	122.5	14.9	120	3
BEXIMCO	91.1	91.1	18.2	200	1
DACCADYE	16.7	16.5	2.2	135	2
DUTCHBANGL	90.0	85.0	129.9	1,519	11
EBL	34.6	31.7	48.6	1,415	3
ENVOYTEX	31.0	31.0	31.0	1,000	2

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ESQUIRENIT	37.9	37.9	0.8	22	1
FIRSTSBANK	10.9	10.9	0.7	60	1
GENEXIL	97.0	94.2	8.7	91	2
KEYACOSMET	7.9	7.9	4.0	500	1
KTL	30.0	30.0	0.8	25	1
MAKSONSPIN	20.1	18.7	3.7	185	2
MALEKSPIN	34.7	34.0	12.8	370	4
MONOSPOOL	129.2	129.2	0.5	4	1
NFML	45.5	44.0	3.5	79	3
NHFIL	46.0	46.0	16.1	350	1
NRBCBANK	36.0	34.8	3.2	92	3
ORIONPHARM	59.5	59.5	6.0	100	1
PADMAOIL	200.0	200.0	25.1	126	1
POWERGRID	47.5	46.4	1.9	40	2
PTL	58.0	58.0	0.6	10	1
QUEENSOUTH	30.2	29.0	8.6	288	4
RAKCERAMIC	37.0	37.0	5.1	138	1
RDFOOD	33.9	33.9	0.8	24	1
ROBI	44.5	44.5	15.8	356	1
SALVOCHEM	32.8	32.1	4.9	152	4
SILCOPHL	26.0	26.0	6.5	250	1
STANDARINS	74.5	74.5	3.7	50	1
VFSTDL	28.9	28.9	1.5	52	1
Total			394.8		65

Important DSE News
BSC

(Q3 Un-audited): EPS was Tk. 1.17 for January-March 2021 as against Tk. 0.91 for January-March 2020; EPS was Tk. 2.83 for July 2020-March 2021 as against Tk. 3.64 for July 2019-March 2020. NOCFPS was Tk. 9.58 for July 2020-March 2021 as against Tk. 5.63 for July 2019-March 2020. NAV per share was Tk. 58.38 as on March 31, 2021 and Tk. 56.03 as on June 30, 2020.

SAIFPOWER

(Q3 Un-audited): Consolidated EPS was Tk. 0.09 for January-March 2021 as against Tk. 0.14 for January-March 2020; Consolidated EPS was Tk. 0.75 for July 2020-March 2021 as against Tk. 1.04 for July 2019-March 2020. Consolidated NOCFPS was Tk. 2.26 for July 2020-March 2021 as against Tk. 2.55 for July 2019-March 2020. Consolidated NAV per share was Tk. 16.11 as on March 31, 2021 and Tk. 16.63 as on June 30, 2020.

PUBALIBANK

Refer to their earlier news disseminated on 04.03.2021 regarding "Decision to issue Perpetual Bond", the Company has further informed that the Board of Directors has decided to raise Pubali Bank Perpetual Bond of Tk. 500.00 Crore in following manner instead of Private Placement only to comply with Bangladesh Securities Exchange Commission Directive No. BSEC/CMRRDP009-193/19 dated 23 May, 2021: BDT 450.00 Crore through Private Placement and the rest amount of BDT 50.00 Crore through Public Offer instead of Private Placement totaling of BDT 500.00 Crore Contingent Convertible, Basel III compliant Pubali Bank Perpetual Bond as part of Additional Tier-I (AT-1) Capital of the Company subject to approval from concerned authorities and complying with regulatory requirements.

UCB

Mr. Mohammed Shah Alam, one of the Nominated Directors (nominated from Ardent Asset Management Limited) of United Commercial Bank Limited, has expressed his intention to sell his entire holdings of 43,250 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (CSE) within next 30 working days.

ASIAINS

The auditor of the Asia Insurance Limited has given the "Emphasis of Matter" paragraph in the Auditor's Report for the year ended on 31 December 2020. In this regard, we may disseminate the following news through our online trading system: Emphasis of Matters: Without qualifying our opinion, we draw attention to the following matter: 1. As disclosed in note # 3 of the financial statements, where the company has presented its shareholding position, it is observed that 40% of the total issued share capital of the Company is subscribed by sponsor shareholders while the remaining 60% is subscribed by the general public. This is non-compliance of Schedule 1, Section 21 of the Insurance Act 1938 (as amended in 2010), where it is stated that at least 60% of the issued capital shall have to be subscribed by the sponsor shareholders. As per section 232 & 234 of The Bangladesh Labor Act 2006 (amended in 2018), if the amount of paid-up capital on the last day of the accounting year is not less than BDT 1 crore and/or, the value of its permanent assets on the last day of the accounting year is not less than BDT 2 crore, a company has to establish a Worker's Profit Participation Fund (WPPF). Paid-up capital as on 31.12.2020 is BDT 470,698,580 and carrying amount of permanent assets as on 31 December 2020 is BDT 207,626,926.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
KARNAPHULI	-	0.0%	10.0%	Record Date	27-Jun-21
AMBEEPHA	-	0.0%	15.0%	Record Date	28-Jun-21
PHOENIXFIN	-	0.0%	15.0%	Record Date	30-Jun-21
PRAGATIINS	-	0.0%	30.0%	Record Date	30-Jun-21
UCB	-	5.0%	5.0%	Record Date	30-Jun-21

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