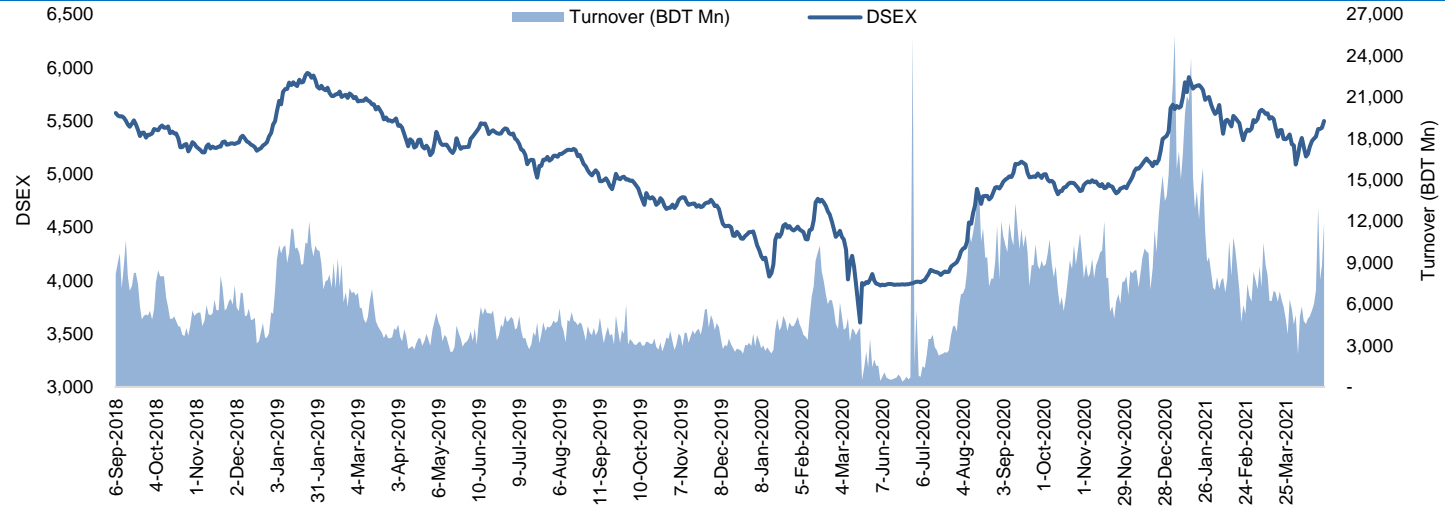


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.16%) gained 63.18 points and closed at 5,498.21. The blue-chip index DS30 (+1.44%), the Shariah-based index DSES (+1.48%), and the large-cap index CDSET (+1.08%) closed at 2,117.69, 1,255.73, and 1,182.14 points, respectively. All the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 2.74% followed by Engineering (+1.24%), Fuel & Power (+0.91%), NBFi (+0.78%), Telecommunication (+0.71%), Food & Allied (+0.23%), and Bank (+0.19%), respectively. Block trades contributed 15.8% of the overall market turnover. Bangladesh Export Import Company Ltd. (+0.6%) was the most traded share with a turnover of BDT 1,178 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,498.21	5,435.03	+63.18	+1.16%	+1.8%
DS30	2,117.69	2,087.55	+30.14	+1.44%	+7.8%
DSES	1,255.73	1,237.39	+18.34	+1.48%	+1.1%
CDSET	1,182.14	1,169.52	+12.62	+1.08%	+5.3%

	Advanced	Declined	Unchanged	Total
All Category	201	80	78	359
A Category (Equity)	147	57	58	262
B Category (Equity)	33	14	10	57
N Category (Equity)	7	2	2	11
Z Category (Equity)	14	7	8	29
Mutual Funds	10	6	21	37
Corporate Bonds	1	1	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	4,726,172	4,683,168	+0.9%
	Mn USD	55,628	55,122	
Turnover	Mn BDT	11,889	8,833	+34.6%
	Mn USD	140	104	
Volume	Mn Shares	272	229	+18.8%
No. of Trade		169,672	150,287	+12.9%

Figure: Sectorial Turnover (BDT Mn)

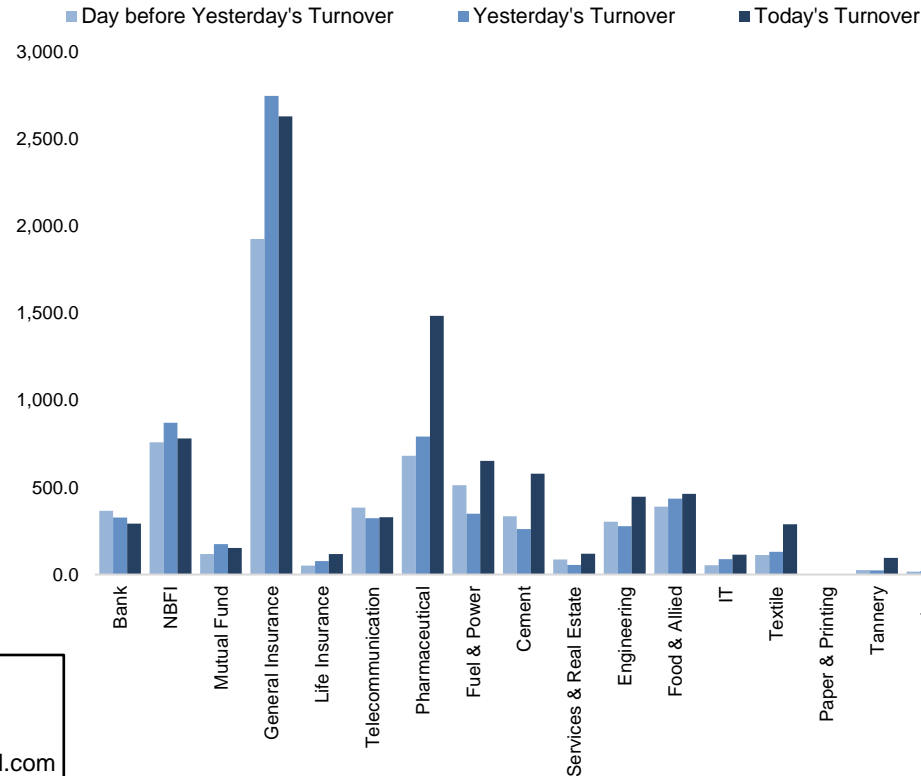
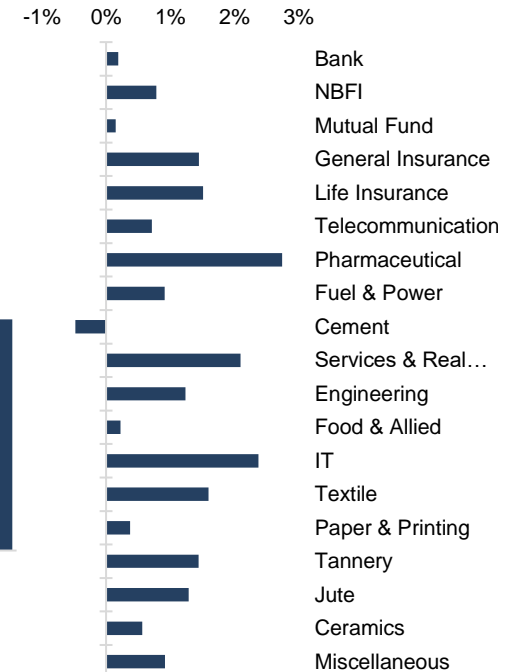


Figure: Sectorial Mcap Change



Market PE 18.7x  
Market PB 1.8x

<b>Md. Rafiqul Islam</b> Research Associate (880) 1708805229 mrafiqulislam@bracepl.com	<b>Md Mahirul Quddus</b> Research Associate (880) 1709636546 mmahirul.quddus@bracepl.com
---	---

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	1,280	1,278	+2.41	+0.19%	31	553,109	13.3%	291.6	2.9%	7.1x	0.7x	GP	458,022	11.0%	24.0	12.9x	10.8x
NBFI	1,859	1,844	+14.42	+0.78%	23	182,615	4.4%	780.2	7.8%	53.6x	3.0x	WALTONHIL	363,605	8.8%	30.4	47.6x	6.8x
Mutual Fund	877	875	+1.31	+0.15%	37	39,560	1.0%	153.3	1.5%	NM	0.8x	BATBC	283,176	6.8%	289.3	26.0x	2.8x
General Insurance	4,112	4,053	+58.66	+1.45%	38	106,348	2.6%	2,627.4	26.2%	22.1x	2.0x	ROBI	240,421	5.8%	258.6	NM	3.6x
Life Insurance	2,056	2,026	+30.64	+1.51%	12	56,217	1.4%	117.2	1.2%	NM	NM	SQURPHARMA	190,587	4.6%	123.1	13.4x	2.3x
Telecommunication	6,187	6,143	+43.85	+0.71%	3	726,906	17.5%	328.0	3.3%	19.1x	6.3x	UPGDCL	159,648	3.9%	37.9	19.7x	5.8x
Pharmaceutical	3,431	3,340	+91.61	+2.74%	31	625,191	15.1%	1,484.1	14.8%	22.0x	2.6x	RENATA	126,809	3.1%	320.2	28.7x	5.5x
Fuel & Power	1,655	1,640	+14.96	+0.91%	22	442,580	10.7%	652.7	6.5%	13.1x	1.4x	BXPHARMA	87,304	2.1%	665.6	21.8x	2.4x
Cement	1,778	1,787	-8.52	-0.48%	7	104,411	2.5%	577.8	5.8%	24.6x	2.4x	BERGERPBL	79,584	1.9%	25.7	32.2x	8.1x
Services & Real Estate	1,057	1,035	+21.68	+2.09%	8	41,066	1.0%	118.6	1.2%	NM	0.9x	ICB	77,278	1.9%	4.8	28.6x	1.8x
Engineering	4,338	4,285	+53.10	+1.24%	42	529,498	12.8%	446.3	4.5%	34.2x	2.6x	BEXIMCO	75,539	1.8%	1,178.0	NM	1.2x
Food & Allied	20,619	20,573	+46.41	+0.23%	20	373,077	9.0%	463.3	4.6%	33.9x	3.3x	LHBL	66,431	1.6%	509.8	23.2x	3.6x
IT	2,165	2,115	+50.24	+2.38%	11	25,710	0.6%	113.1	1.1%	25.6x	1.9x	MARICO	65,996	1.6%	7.7	21.9x	39.3x
Textile	919	905	+14.42	+1.59%	56	95,893	2.3%	287.5	2.9%	NM	0.6x	BRACBANK	57,145	1.4%	27.6	12.9x	1.2x
Paper & Printing	5,196	5,176	+19.49	+0.38%	4	14,636	0.4%	2.4	0.0%	50.7x	1.0x	SUMITPOWER	46,987	1.1%	115.3	8.6x	1.4x
Tannery	1,696	1,672	+24.11	+1.44%	6	18,508	0.4%	96.3	1.0%	NM	1.8x	ISLAMIBANK	45,724	1.1%	5.0	8.1x	0.7x
Jute	9,429	9,309	+119.78	+1.29%	3	2,325	0.1%	13.2	0.1%	NM	14.9x	OLYMPIC	33,410	0.8%	6.2	16.3x	4.0x
Ceramics	518	515	+2.91	+0.57%	5	26,289	0.6%	131.3	1.3%	66.7x	1.7x	UNILEVERCL	33,282	0.8%	4.2	62.9x	22.4x
Miscellaneous	3,602	3,569	+32.80	+0.92%	14	181,693	4.4%	1,325.6	13.2%	50.9x	1.9x	TITASGAS	32,249	0.8%	7.0	9.4x	0.5x
												EBL	32,066	0.8%	15.0	7.7x	1.1x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AGRANINS	58.8	+9.9%	175.9	35.9x	3.4x
PHENIXINS	45.9	+9.8%	51.9	22.4x	1.3x
DOMINAGE	22.4	+9.8%	37.5	10.3x	1.3x
PROVATIINS	137.9	+9.8%	36.0	52.0x	7.6x
KBPPWBIL	7.9	+9.7%	3.3	NM	0.6x
SHYAMPSUG	54.3	+9.7%	1.3	NM	NM
MEGHNALIFE	64.8	+9.6%	44.1	NM	NM
NFML	20.5	+9.6%	54.6	38.3x	1.5x
FORTUNE	19.4	+9.6%	96.2	53.3x	1.5x
BGIC	47.0	+9.6%	132.3	36.7x	2.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	124,701	8.6%	13.4x	2.3x
BATBC	74,900	5.1%	26.0x	2.8x
RENATA	61,908	4.3%	28.7x	5.5x
BXPHARMA	60,956	4.2%	21.8x	2.4x
BEXIMCO	52,462	3.6%	NM	1.2x
GP	45,802	3.1%	12.9x	10.8x
BRACBANK	30,721	2.1%	12.9x	1.2x
ROBI	23,922	1.6%	NM	3.6x
LHBL	23,463	1.6%	23.2x	3.6x
EBL	22,389	1.5%	7.7x	1.1x
ISLAMIBANK	22,259	1.5%	8.1x	0.7x
OLYMPIC	20,266	1.4%	16.3x	4.0x
BEACONPHAR	19,613	1.3%	46.5x	5.9x
SUMITPOWER	17,286	1.2%	8.6x	1.4x
PUBALIBANK	17,189	1.2%	6.8x	0.6x
CITYBANK	16,762	1.2%	5.7x	0.8x
UPGDCL	15,965	1.1%	19.7x	5.8x
NBL	14,813	1.0%	6.0x	0.4x
ALARABANK	13,495	0.9%	6.4x	1.0x
LANKABAFIN	12,029	0.8%	25.4x	1.9x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	86.2	+0.6%	1,178.0	NM	1.2x
BXPHARMA	195.7	+2.4%	665.6	21.8x	2.4x
LHBL	57.2	-0.9%	509.8	23.2x	3.6x
LANKABAFIN	33.6	+0.3%	360.8	25.4x	1.9x
RENATA	1,301.3	+6.2%	320.2	28.7x	5.5x
BDFINANCE	35.4	-3.3%	310.2	18.8x	2.0x
BATBC	524.4	+0.2%	289.3	26.0x	2.8x
ROBI	45.9	+0.7%	258.6	NM	3.6x
DHAKAINS	67.5	+8.2%	243.9	27.9x	3.4x
ASIAPACINS	70.0	-1.8%	179.1	38.5x	3.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KEYACOSMET	5.4	-5.3%	66.1	NM	0.4x
FAMILYTEX	2.5	-3.8%	0.9	NM	0.2x
PARAMOUNT	101.2	-3.8%	97.5	20.7x	4.2x
EMERALDOIL	16.7	-3.5%	5.8	NM	1.1x
RDFOOD	25.6	-3.4%	37.0	NM	1.7x
BDFINANCE	35.4	-3.3%	310.2	18.8x	2.0x
ICB3RDNRB	6.0	-3.2%	0.6	NM	1.1x
CAPMIBBLMF	21.4	-3.2%	20.3	NM	2.4x
SQUARETEXT	30.8	-3.1%	0.4	NM	0.9x
CRYSTALINS	50.9	-2.7%	96.2	25.2x	2.6x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
ADNTEL	45.6	45.6	1.1	25	1
ANWARGALV	116.0	116.0	0.7	6	1
BDTHAI	23.6	23.6	11.8	500	2
BEXIMCO	81.0	81.0	0.5	6	1
BXPHARMA	192.0	191.5	51.8	270	2
CENTRALINS	63.0	61.0	18.3	292	9
EASTERNINS	115.0	110.5	10.6	94	3
EGEN	34.1	34.1	0.5	15	1
EIL	34.0	34.0	0.5	15	1
GENEXIL	52.0	49.3	8.5	166	6

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
GP	344.0	344.0	550.4	1,600	1
MIRAKHTER	65.0	65.0	1.0	15	1
MONNOCERA	126.2	126.2	1.3	11	2
NFML	20.5	19.0	160.5	8,422	10
ORIONINFU	75.1	75.1	0.5	7	1
PARAMOUNT	113.0	111.0	4.7	42	3
PROGRESLIF	103.2	92.9	6.5	69	2
PROVATIINS	120.0	120.0	7.7	64	2
PURABIGEN	33.5	33.5	0.5	16	1
RENATA	1,235.0	1,224.9	318.6	260	9
SPCERAMICS	25.0	25.0	2.5	100	1
SPCL	72.0	72.0	144.0	2,000	8
SQURPHARMA	212.0	212.0	19.1	90	1
SSSTEEL	17.1	17.1	0.5	30	1
STANCERAM	281.1	281.1	0.5	2	1
UPGDCL	278.0	278.0	556.0	2,000	1
<b>Total</b>			<b>1,878.6</b>		<b>72</b>

**Important DSE News**
**JANATAINS**

The Board of Directors has recommended 6% cash and 5% stock Dividend for the year ended on December 31, 2020. Date of AGM: 29.07.2021, Time: 11:00 AM, Venue: Digital Platform. Record Date: 07.06.2021. The Company has also reported EPS of Tk. 1.25, NAV per share of Tk. 14.45 and NOCFPS of Tk. 2.11 for the year ended on December 31, 2019 as against Tk. 1.08, Tk. 14.22 and Tk. 0.86 respectively for the same period of the previous year.

(Q1 Un-audited): EPS was Tk. 0.44 for January-March 2021 as against Tk. 0.40 for January-March 2020. NOCFPS was Tk. 0.97 for January-March 2021 as against Tk. 0.49 for January-March 2020. NAV per share was Tk. 14.75 as on March 31, 2021 and Tk. 14.45 as on December 31, 2020.

**SONALIPAPR**

(Q3 Un-audited): EPS was Tk. 0.22 for January-March 2021 as against Tk. 0.32 for January-March 2020; EPS was Tk. 2.29 for July 2020-March 2021 as against Tk. 2.08 for July 2019-March 2020. NOCFPS was Tk. 7.80 for July 2020-March 2021 as against Tk. 7.10 for July 2019-March 2020. NAV per share was Tk. 281.73 as on March 31, 2021 and Tk. 307.88 as on June 30, 2020

**IPDC**

(Q1 Un-audited): EPS was Tk. 0.55 for January-March 2021 as against Tk. 0.40 for January-March 2020. NOCFPS was Tk. (18.09) for January-March 2021 as against Tk. 1.98 for January-March 2020. NAV per share was Tk. 16.52 as on March 31, 2021 and Tk. 16.34 as on December 31, 2020.

**LHBL**

(Q1 Un-audited): Consolidated EPS was Tk. 0.89 for January-March 2021 as against Tk. 0.45 for January-March 2020. Consolidated NOCFPS was Tk. 2.83 for January-March 2021 as against Tk. 1.16 for January-March 2020. Consolidated NAV per share was Tk. 15.76 as on March 31, 2021 and Tk. 14.23 as on December 31, 2020.

**MERCANBANK**

(Q1 Un-audited): Consolidated EPS was Tk. 0.64 for January-March 2021 as against Tk. 0.55 for January-March 2020. Consolidated NOCFPS was Tk. 4.92 for January-March 2021 as against Tk. 1.48 for January-March 2020. Consolidated NAV per share was Tk. 23.21 as on March 31, 2021 and Tk. 24.23 as on March 31, 2020

**IBNSINA**

(Q3 Un-audited): EPS was Tk. 2.79 for January-March 2021 as against Tk. 2.33 for January-March 2020; EPS was Tk. 10.92 for July 2020-March 2021 as against Tk. 9.63 for July 2019-March 2020. NOCFPS was Tk. 14.17 for July 2020-March 2021 as against Tk. 9.54 for July 2019-March 2020. NAV per share was Tk. 64.08 as on March 31, 2021 and Tk. 56.88 as on June 30, 2020.

**RDFOOD**

Ms. Rumana Kabir, one of the Directors of the Company, has expressed her intention to buy 7,00,000 shares at prevailing market price (in the Public Market) through Stock Exchange (DSE) within April 29, 2021.

Bidisha International Ltd., one of the Corporate Directors of the Company, has expressed its intention to buy 8,00,000 shares at prevailing market price (in the Public Market) through Stock Exchange (DSE) within April 29, 2021.

**BBS**

Mr. Md. Ashraf Ali Khan, one of the Directors (resigned) of Bangladesh Building Systems Ltd., has expressed his intention to sell his entire holdings of 61,99,600 shares of the Company, whereas Mr. Hasan Morshed Chowdhury and Mr. Mohammad Ruhul Majid, both are Directors of the Company have expressed their intention to buy 30,99,800 shares each at prevailing market price (in the Block Market) through Stock Exchange (CSE) within April 29, 2021.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
EASTLAND	-	3.0%	7.0%	Record Date	28-Apr-21
LINDEBD	-	0.0%	400.0%	Record Date	29-Apr-21
ROBI	-	0.0%	3.0%	Record Date	02-May-21
UTTARABANK	-	12.5%	12.5%	Record Date	02-May-21
LIBRAINFU	-	0.0%	5.0%	Record Date	03-May-21
BRACBANK	-	5.0%	10.0%	Record Date	04-May-21
EBL	-	17.5%	1750.0%	Record Date	05-May-21
PUBALIBANK	-	0.0%	12.5%	Record Date	09-May-21
ICBIBANK	-	0.0%	0.0%	Record Date	12-May-21

**Disclaimer:** This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.