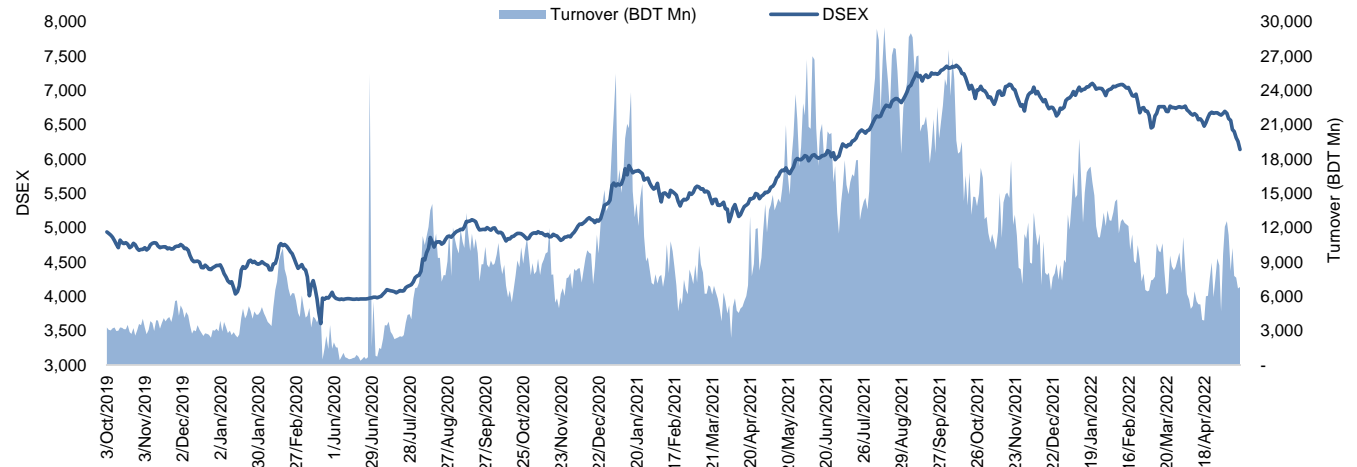


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.85%) lost 115.57 points and closed at 6,142.68. The blue-chip index DS30 (-1.71%), the Shariah-based index DSES (-1.54%), and the large-cap index CDSET (-1.67%) closed at 2,277.16, 1,361.73, and 1,245.59 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.13% followed by Food & Allied (-1.72%), Bank (-1.62%), Fuel & Power (-1.56%), Pharmaceutical (-1.31%), Engineering (-1.29%), and Telecommunication (+0.10%), respectively. Block trades contributed 0.8% of the overall market turnover. Southeast Bank Ltd. (+5.0%) was the most traded share with a turnover of BDT 703 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,142.68	6,258.25	-115.57	-1.85%	-9.1%
DS30	2,277.16	2,316.68	-39.52	-1.71%	-10.1%
DSES	1,361.73	1,383.04	-21.31	-1.54%	-4.8%
CDSET	1,245.59	1,266.72	-21.13	-1.67%	-8.4%

	Advanced	Declined	Unchanged	Total
All Category	21	345	13	379
A Category (Equity)	14	239	9	262
B Category (Equity)	4	84	1	89
N Category (Equity)	0	5	0	5
Z Category (Equity)	3	17	3	23
Mutual Funds	2	32	1	35
Corporate Bonds	0	2	1	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,031,662	5,098,722	-1.3%
	Mn USD	58,508	59,287	-1.3%
Turnover	Mn BDT	6,822	6,689	+2.0%
	Mn USD	79	78	+2.0%
Volume	Mn Shares	219	176	+24.8%
No. of Trade		144,335	155,461	-7.2%

Figure: Sectorial Turnover (BDT)

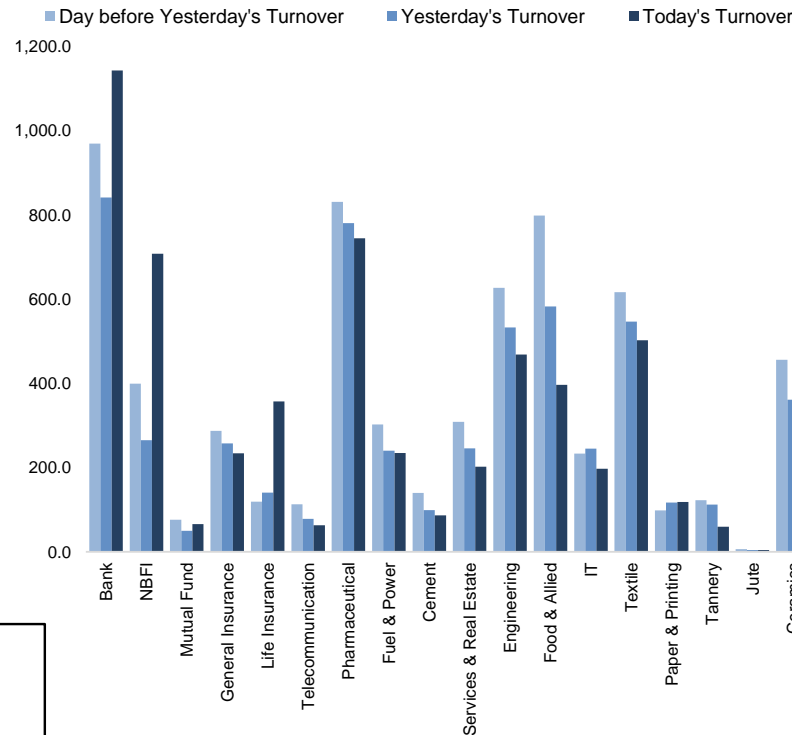
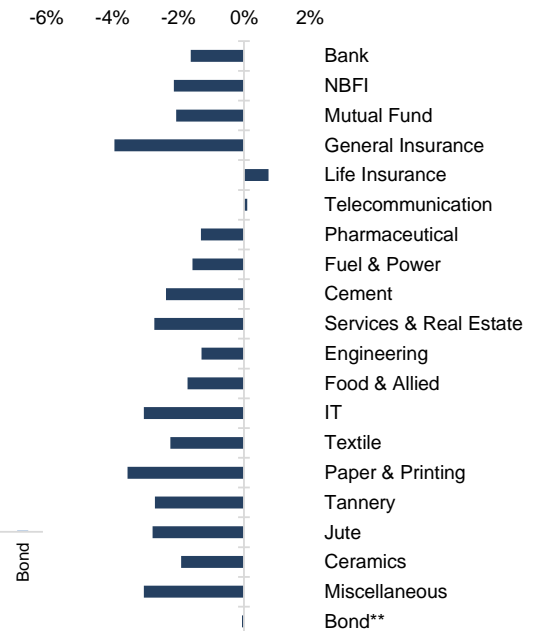


Figure: Sectorial Mcap Change



Market PE 15.4x
Market PB 1.7x

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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	1,397	1,420	-22.95	-1.62%	33	641,937	14.6%	1,142.8	17.3%	7.6x	0.7x	GP	410,356	9.3%	16.6	12.3x	7.1x
NBFI	1,870	1,910	-40.63	-2.13%	23	183,969	4.2%	707.9	10.7%	NM	3.3x	WALTONHIL	327,890	7.4%	5.0	22.9x	3.4x
Mutual Fund	831	848	-17.47	-2.06%	36	36,768	0.8%	66.0	1.0%	NM	0.7x	BATBC	286,524	6.5%	73.9	18.8x	8.7x
General Insurance	3,128	3,257	-128.18	-3.94%	40	91,922	2.1%	234.2	3.5%	14.6x	1.5x	SQURPHARMA	189,523	4.3%	54.3	10.2x	1.9x
Life Insurance	2,212	2,196	+16.45	+0.75%	13	62,132	1.4%	356.9	5.4%	NM	NM	ROBI	155,043	3.5%	32.5	84.6x	2.3x
Telecommunication	5,087	5,083	+4.88	+0.10%	3	599,782	13.6%	63.0	1.0%	16.0x	4.4x	RENATA	142,363	3.2%	18.3	25.7x	5.0x
Pharmaceutical	3,728	3,778	-49.38	-1.31%	32	699,841	15.9%	744.6	11.3%	17.2x	2.5x	UPGDCL	140,576	3.2%	7.6	11.4x	4.3x
Fuel & Power	1,724	1,751	-27.40	-1.56%	23	449,734	10.2%	234.8	3.6%	11.2x	1.1x	BEXIMCO	110,329	2.5%	357.3	7.7x	1.4x
Cement	2,445	2,504	-59.32	-2.37%	7	119,736	2.7%	86.5	1.3%	24.6x	2.6x	LHBL	83,038	1.9%	71.6	21.9x	4.7x
Services & Real Estate	1,340	1,377	-37.43	-2.72%	8	50,918	1.2%	202.3	3.1%	83.2x	1.0x	BERGERPBL	79,515	1.8%	0.1	26.3x	7.2x
Engineering	4,568	4,627	-59.67	-1.29%	42	534,064	12.1%	468.3	7.1%	18.5x	1.9x	ICB	76,633	1.7%	6.7	43.4x	1.7x
Food & Allied	21,365	21,739	-373.27	-1.72%	21	379,832	8.6%	396.2	6.0%	23.0x	8.9x	MARICO	73,275	1.7%	22.7	20.6x	27.2x
IT	2,605	2,687	-81.67	-3.04%	11	32,971	0.7%	197.5	3.0%	26.8x	2.3x	BEACONPHAR	68,399	1.6%	67.1	73.1x	11.7x
Textile	1,438	1,471	-32.86	-2.23%	58	155,432	3.5%	502.1	7.6%	22.0x	1.0x	BXPBARMA	64,686	1.5%	31.9	11.3x	1.6x
Paper & Printing	8,290	8,594	-303.99	-3.54%	6	29,662	0.7%	118.4	1.8%	NM	2.0x	BRACBANK	59,028	1.3%	7.5	11.1x	1.1x
Tannery	3,412	3,507	-94.96	-2.71%	6	36,414	0.8%	59.3	0.9%	51.4x	3.6x	ISLAMIBANK	53,291	1.2%	4.0	10.8x	0.8x
Jute	7,659	7,878	-218.78	-2.78%	3	1,763	0.0%	4.4	0.1%	NM	26.7x	DUTCHBANGL	39,784	0.9%	10.7	6.9x	1.0x
Ceramics	667	680	-12.99	-1.91%	5	30,048	0.7%	143.4	2.2%	28.2x	1.8x	POWERGRID	39,343	0.9%	33.3	10.7x	0.4x
Miscellaneous	4,262	4,396	-133.78	-3.04%	15	236,698	5.4%	879.5	13.3%	11.8x	2.0x	SUMITPOWER	38,871	0.9%	6.5	9.3x	1.1x
Bond**	87	87	-0.05	-0.06%	8	32,392	0.7%	1.3	0.0%	NM	NM	TITASGAS	36,700	0.8%	10.1	11.0x	0.5x

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
FIRSTFIN	6.0	+7.1%	6.7	NM	NM	SQURPHARMA	124,005	7.5%	10.2x	1.9x	SOUTHEASTB	14.8	+5.0%	702.5	9.3x	0.6x
DELTALIFE	118.8	+5.6%	292.7	NM	NM	BATBC	75,786	4.6%	18.8x	8.7x	IPDC	45.7	-1.7%	391.7	18.9x	2.6x
SOUTHEASTB	14.8	+5.0%	702.5	9.3x	0.6x	BEXIMCO	73,534	4.5%	7.7x	1.4x	BEXIMCO	125.9	-4.7%	357.3	7.7x	1.4x
NAHEEACP	63.6	+4.4%	35.7	21.8x	3.4x	RENATA	69,373	4.2%	25.7x	5.0x	DELTALIFE	118.8	+5.6%	292.7	NM	NM
GSPFINANCE	29.2	+2.5%	122.7	17.9x	1.5x	BEACONPHAR	47,879	2.9%	73.1x	11.7x	BSC	116.5	-0.2%	241.2	10.3x	1.7x
SEMILLECMF	9.1	+2.2%	7.5	NM	1.0x	BXPBARMA	45,164	2.7%	11.3x	1.6x	JHRML	76.3	-5.0%	233.4	36.7x	2.5x
JUTESPINN	124.7	+2.2%	0.2	NM	NM	GP	41,036	2.5%	12.3x	7.1x	SALVOCHEM	60.1	-3.7%	166.7	25.0x	4.0x
SAVAREFR	184.9	+2.2%	0.2	NM	2641.4x	BRACBANK	31,734	1.9%	11.1x	1.1x	GSPFINANCE	29.2	+2.5%	122.7	17.9x	1.5x
KTL	32.6	+2.2%	67.7	55.2x	1.9x	LHBL	29,329	1.8%	21.9x	4.7x	ACIFORMULA	172.7	-4.9%	86.1	29.2x	2.6x
SHAHJABANK	19.8	+1.5%	1.7	7.9x	1.0x	ISLAMIBANK	25,942	1.6%	10.8x	0.8x	SPCERAMICS	38.5	-4.9%	79.8	86.4x	1.2x

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)
FIRSTSBANK	10.3	-8.8%	7.8	2.8x	0.5x	IPDC	51.1	44.2	7.0	1,551	77.01
EASTLAND	29.3	-7.0%	7.7	19.3x	1.4x	DELTALIFE	123.5	123.5	1.0	320	39.52
DELTASPINN	7.6	-5.0%	5.4	NM	0.6x	SALVOCHEM	67.0	61.4	4.0	387	24.10
GBBPOWER	20.9	-5.0%	19.6	17.1x	1.0x	SPCERAMICS	42.0	38.6	4.0	410	16.34
ARAMITCEM	26.6	-5.0%	3.6	NM	1.1x	BEXIMCO	143.9	143.9	5.0	63	9.07
FAMILYTEX	3.8	-5.0%	3.3	NM	0.3x	SONALIPAPR	812.0	812.0	4.0	10	8.12
RDFOOD	47.5	-5.0%	53.3	31.9x	3.1x	ORIONPHARM	99.1	90.1	2.0	75	7.38
PHENIXINS	40.0	-5.0%	7.8	17.3x	1.0x	KTL	32.7	32.7	2.0	142	4.64
JHRML	76.3	-5.0%	233.4	36.7x	2.5x	STANDARINS	54.0	53.0	4.0	80	4.26
ALLTEX	21.0	-5.0%	26.1	NM	3.5x	BRACBANK	46.1	46.1	2.0	70	3.23

*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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
IPDC	51.1	44.2	77.0	1,551	7
DELTALIFE	123.5	123.5	39.5	320	1
SALVOCHEM	67.0	61.4	24.1	387	4
SPCERAMICS	42.0	38.6	16.3	410	4
BEXIMCO	143.9	143.9	9.1	63	5
SONALIPAPR	812.0	812.0	8.1	10	4
ORIONPHARM	99.1	90.1	7.4	75	2
KTL	32.7	32.7	4.6	142	2
STANDARINS	54.0	53.0	4.3	80	4
BRACBANK	46.1	46.1	3.2	70	2
PHOENIXFIN	19.5	18.9	2.7	140	2
NEWLINE	47.5	47.5	2.4	50	1
QUASEMIND	58.0	58.0	2.3	40	1
JHRML	76.5	76.5	2.3	30	2
LANKABAFIN	30.5	30.5	1.9	62	2
AL-HAJTEX	105.0	96.0	1.6	16	3
GENEXIL	87.5	87.5	1.1	13	1
BDTHAIFOOD	41.4	41.4	0.8	20	1
BDFINANCE	45.6	45.6	0.7	15	1
YPL	23.0	23.0	0.6	25	1
FORTUNE	108.0	108.0	0.5	5	1
RDFOOD	51.0	51.0	0.5	10	1
Total			212.5		55

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Mutual Trust Bank Ltd.	-	10.0%	0.0%	Record Date	23-May-22
Bata Shoe Company (Bangladesh) Limited	-	0.0%	25.0%	Record Date	23-May-22
Agrani Insurance Co. Ltd.	-	0.0%	15.0%	Record Date	23-May-22
Continental Insurance Ltd.	-	0.0%	12.0%	Record Date	24-May-22
Standard Insurance Limited	-	0.0%	13.0%	Record Date	24-May-22
Dhaka Bank Ltd.	-	0.0%	12.0%	Record Date	24-May-22
AB Bank Limited	-	3.0%	2.0%	Record Date	24-May-22
Crystal Insurance Company Limited	-	0.0%	10.0%	Record Date	24-May-22
Peoples Insurance Company Ltd.	-	0.0%	12.5%	Record Date	25-May-22
Bangladesh National Insurance Company Limited	-	0.0%	18.0%	Record Date	25-May-22
Phoenix Insurance Company Ltd.	-	0.0%	15.0%	Record Date	25-May-22
Pioneer Insurance Comapny Ltd.	-	10.0%	25.0%	Record Date	25-May-22
Asia Pacific General Insurance Co. Ltd.	-	0.0%	18.0%	Record Date	26-May-22
Central Insurance Company Ltd.	-	0.0%	18.0%	Record Date	26-May-22
Islami Bank Bangladesh Limited	-	0.0%	10.0%	Record Date	26-May-22
Export Import (Exim) Bank of Bangladesh Limited	-	0.0%	10.0%	Record Date	26-May-22
Northern General Insurance Company Ltd.	-	0.0%	10.0%	Record Date	26-May-22

Important DSE News
EASTLAND

The Board of Directors has recommended 10% cash dividend for the year ended December 31, 2021. Date of AGM: 20.07.2022, Time: 3:00 PM, Venue: Digital Platform; Record date: 09.06.2022. The Company has also reported EPS of Tk. 1.51, NAV per share of Tk. 20.89 and NOCFPS of Tk. 0.87 for the year ended December 31, 2021 as against Tk. 1.09, Tk. 20.70, and Tk. 0.83 respectively for the same period of the previous year.

(Q1 Un-audited): EPS was Tk. 0.35 for January-March 2022 as against Tk. 0.33 for January-March 2021. NOCFPS was Tk. 0.14 for January-March 2022 as against Tk. 0.11 for January-March 2021. NAV per share was Tk. 21.18 as on March 31, 2022 and Tk. 20.37 as on March 31, 2021.

DACCADYE

(Q3 Un-audited): EPS was Tk. 0.06 for January-March 2022 as against Tk. 0.19 for January-March 2021; EPS was Tk. 0.79 for July 2021-March 2022 as against Tk. 0.47 for July 2020-March 2021. NOCFPS was Tk. 1.34016 for July 2021-March 2022 as against Tk. 1.18162 for July 2020-March 2021. NAV per share was Tk. 35.28 as on March 31, 2022 and Tk. 34.47 as on June 30, 2021. The Company has also informed that significant profit has decreased in the Q3 period ended March 31, 2022 compare to Q3 period ended March 31, 2021 due to massive repair and maintenance work have done during Q3 period in 2021-2022.

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