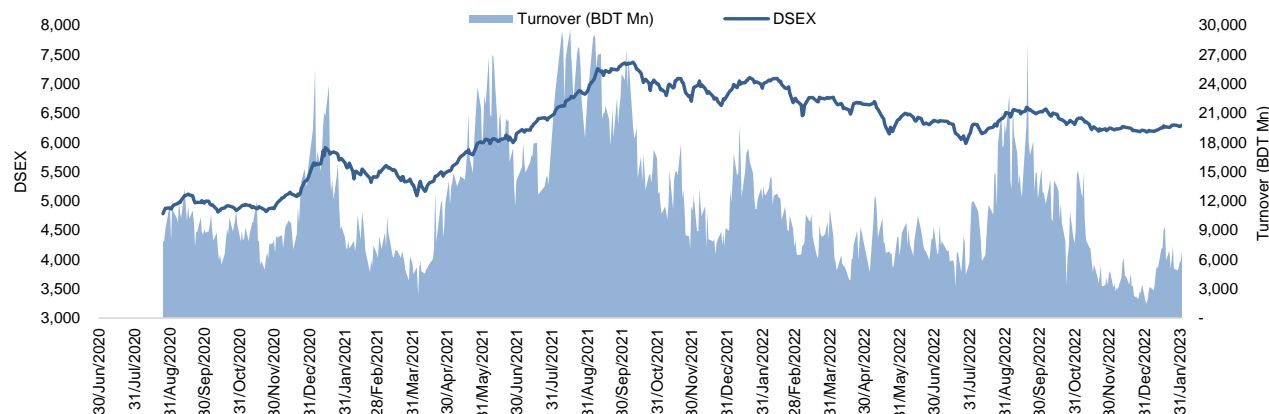


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.09%) lost 5.81 points and closed at 6,280.72. The blue-chip index DS30 (+0.11%), the Shariah-based index DSES (+0.06%), and the large-cap index CDSET (+0.01%) closed at 2,228.80, 1,369.01, and 1,222.84 points, respectively. Most of the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 0.16% followed by Engineering (-0.07%), Food & Allied (-0.06%), Bank (-0.06%), NBF1 (-0.01%), Telecommunication (0.00%), and Pharmaceutical (+0.13%), respectively. Block trades contributed 13.1% of the overall market turnover. Bangladesh Shipping Corporation (+2.4%) was the most traded share with a turnover of BDT 552 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,280.72	6,286.53	-5.81	-0.09%	+1.2%
DS30	2,228.80	2,226.27	+2.53	+0.11%	+1.5%
DSES	1,369.01	1,368.21	+0.80	+0.06%	+0.7%
CDSET	1,222.84	1,222.70	+0.14	+0.01%	+0.7%

	Advanced	Declined	Unchanged	Total
All Category	22	155	168	345
A Category (Equity)	16	97	124	237
B Category (Equity)	5	43	38	86
N Category (Equity)	1	3	3	7
Z Category (Equity)	0	12	3	15
Mutual Funds	1	1	21	23
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,666,180	7,671,082	-0.1%
	Mn USD	71,781	71,827	
Turnover	Mn BDT	5,808	7,527	-22.8%
	Mn USD	54	70	
Volume	Mn Shares	73	101	-28.1%
	No. of Trade	101,045	136,227	-25.8%

* Average Interbank Exchange Rate is BDT 106.80 as of Feb 05, 2023

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Figure: Sectorial Turnover (BDT Mn)

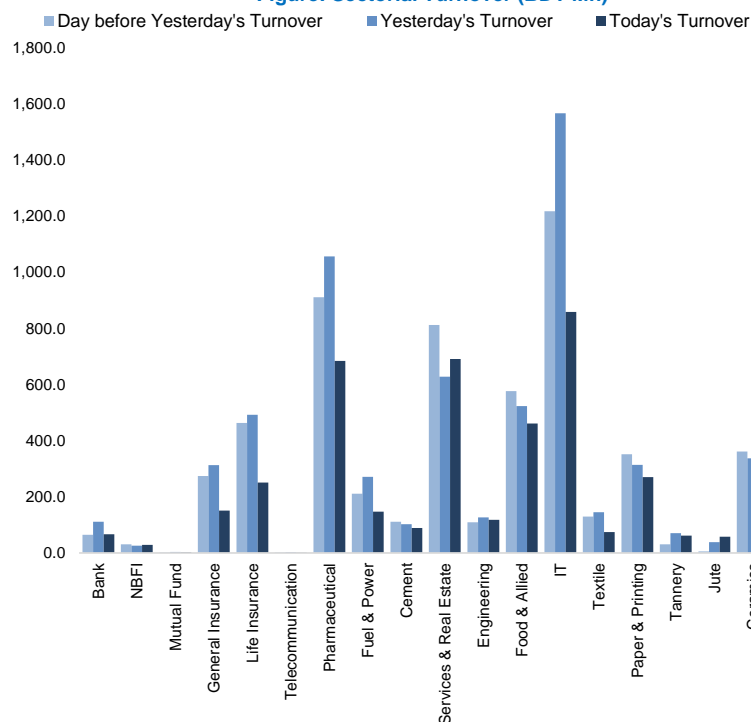
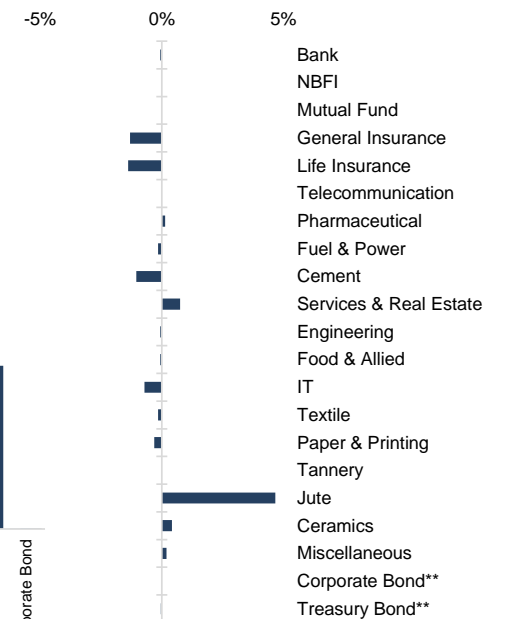


Figure: Sectorial Mcap Change



Market PE 18.5x

Market PB 1.6x

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	1,435	1,436	-0.86	-0.06%	34	670,549	8.8%	66.3	1.3%	7.8x	0.7x	GP	386,996	8.6%	0.7	12.9x	8.4x
NBFI	1,930	1,930	-0.15	-0.01%	23	188,300	2.5%	29.1	0.6%	NM	4.5x	WALTONHIL	317,378	7.0%	0.0	40.4x	4.8x
Mutual Fund	849	849	-0.10	-0.01%	37	38,392	0.5%	2.9	0.1%	NM	0.8x	BATBC	280,098	6.2%	0.7	16.8x	6.7x
General Insurance	3,353	3,398	-44.53	-1.31%	42	97,861	1.3%	150.8	3.0%	16.4x	1.6x	SQURPHARM	185,977	4.1%	2.4	9.7x	1.8x
Life Insurance	2,613	2,649	-36.62	-1.38%	14	73,275	1.0%	251.1	5.0%	NM	NM	ROBI	157,138	3.5%	0.1	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	0.9	0.0%	17.4x	4.7x	RENATA	139,689	3.1%	0.5	31.1x	4.7x
Pharmaceutical	3,770	3,765	+4.96	+0.13%	34	731,254	9.6%	684.1	13.6%	18.8x	2.4x	UPGDCL	135,475	3.0%	0.1	15.4x	4.7x
Fuel & Power	1,697	1,700	-2.65	-0.16%	23	447,426	5.9%	147.1	2.9%	17.8x	1.1x	BEXIMCO	101,302	2.2%	1.1	8.8x	1.2x
Cement	2,315	2,340	-24.63	-1.05%	7	111,208	1.5%	88.5	1.8%	33.6x	2.5x	BERGERPBL	80,586	1.8%	1.0	27.3x	6.7x
Services & Real Est	2,201	2,184	+16.34	+0.75%	8	86,939	1.1%	690.8	13.7%	36.9x	1.1x	MARICO	76,277	1.7%	0.3	20.7x	28.6x
Engineering	4,488	4,491	-3.01	-0.07%	42	526,727	6.9%	118.3	2.3%	51.0x	2.0x	ICB	74,119	1.6%	0.2	NM	1.7x
Food & Allied	21,400	21,413	-12.99	-0.06%	21	381,317	5.0%	461.1	9.1%	21.2x	7.5x	BEACONPHAR	69,670	1.5%	68.4	74.3x	11.3x
IT	3,328	3,352	-23.98	-0.72%	11	43,385	0.6%	858.6	17.0%	31.6x	3.0x	BXPHERMA	65,222	1.4%	21.9	14.1x	1.6x
Textile	1,587	1,589	-2.50	-0.16%	58	166,826	2.2%	74.5	1.5%	42.7x	1.0x	BRACBANK	57,619	1.3%	4.9	10.9x	1.0x
Paper & Printing	10,817	10,851	-34.26	-0.32%	6	41,675	0.5%	270.3	5.4%	41.1x	2.1x	ISLAMIBANK	53,613	1.2%	13.4	10.9x	0.8x
Tannery	3,059	3,059	-0.00	-0.00%	6	32,306	0.4%	62.2	1.2%	46.8x	3.1x	DUTCHBANGL	43,554	1.0%	0.4	7.4x	1.1x
Jute	13,115	12,530	+584.95	+4.67%	3	3,208	0.0%	57.9	1.1%	NM	5.1x	TITASGAS	40,459	0.9%	0.1	13.2x	0.5x
Ceramics	717	714	+3.00	+0.42%	5	33,165	0.4%	448.3	8.9%	42.8x	2.0x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,145	4,137	+8.08	+0.20%	14	223,416	2.9%	580.8	11.5%	13.3x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.7x	0.9x
Corporate Bond**	88	88	-	-	9	36,415	0.5%	0.9	0.0%	NM	NM	BSCCL	36,098	0.8%	0.1	14.3x	2.9x
Treasury Bond**	96	96	-0.04	-0.04%	252	3,072,211	40.5%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SONALIANS	431.3	+6.8%	55.5	NM	1.9x
SEAPEARL	272.1	+4.0%	339.2	66.0x	19.2x
MONOSPOOL	286.5	+3.8%	82.6	38.4x	6.1x
NORTHRINS	41.3	+3.0%	0.1	22.1x	1.9x
SPCERAMICS	51.8	+3.0%	417.4	95.9x	1.7x
BEACONPHAR	301.6	+2.5%	68.4	74.3x	11.3x
ORIONINFU	395.6	+2.5%	189.5	NM	30x
BSC	144.1	+2.4%	552.0	10.0x	1.9x
GEMINISEA	463.9	+1.9%	166.7	33.1x	27.0x
SAMATALETH	58.0	+1.8%	0.3	NM	4.1x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,685	7.2%	9.7x	1.8x
BATBC	74,086	4.4%	16.8x	6.7x
BEXIMCO	70,355	4.1%	8.8x	1.2x
RENATA	68,196	4.0%	31.1x	4.7x
BEACONPHAR	48,769	2.9%	74.3x	11.3x
BXPHERMA	45,538	2.7%	14.1x	1.6x
GP	38,700	2.3%	12.9x	8.4x
BRACBANK	30,976	1.8%	10.9x	1.0x
LHBL	26,622	1.6%	18.4x	4.1x
ISLAMIBANK	24,083	1.4%	10.9x	0.8x
NBL	19,116	1.1%	NM	0.6x
PUBALIBANK	18,525	1.1%	5.5x	0.6x
OLYMPIC	17,719	1.0%	19.0x	3.1x
CITYBANK	17,615	1.0%	4.5x	0.8x
SEAPEARL	17,470	1.0%	66.0x	19.2x
ROBI	15,714	0.9%	NM	2.4x
ALARABANK	14,609	0.9%	14.6x	1.1x
BSRMLTD	14,417	0.8%	NM	0.7x
ORIONPHARM	14,309	0.8%	25.6x	1.0x
PRIMEBANK	13,807	0.8%	6.5x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BSC	144.1	+2.4%	552.0	10.0x	1.9x
GENEXIL	104.5	-1.0%	534.7	31.6x	5.6x
SPCERAMICS	51.8	+3.0%	417.4	95.9x	1.7x
SEAPEARL	272.1	+4.0%	339.2	66.0x	19.2x
ORIONPHARM	89.9	-2.6%	260.5	25.6x	1.0x
OLYMPIC	146.1	-0.5%	247.0	19.0x	3.1x
EHL	103.1	-2.4%	197.1	16.2x	1.4x
ORIONINFU	395.6	+2.5%	189.5	NM	29.6x
GEMINISEA	463.9	+1.9%	166.7	33.1x	27.0x
BPML	87.0	-1.4%	160.5	24.0x	1.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
OIMEX	16.1	-12.0%	20.1	NM	1.4x
PRAGATILIF	139.2	-6.8%	45.0	NM	NM
RELIANCINS	65.1	-4.5%	3.9	11.4x	1.0x
POPULARLIF	75.8	-3.9%	26.3	NM	NM
BDTHAIFOOD	39.6	-3.2%	15.0	95.0x	2.7x
HWAWELLTEX	51.3	-3.0%	19.5	NM	1.5x
SONALILIFE	65.3	-3.0%	27.8	NM	NM
PIONEERINS	75.7	-2.9%	24.3	12.2x	1.6x
GREENDELTA	67.4	-2.7%	7.3	9.0x	1.0x
PRAGATIINS	70.0	-2.6%	9.3	12.0x	1.2x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPEARL	276.0	238.8	33.0	671	171.78
ISLAMIBANK	35.5	35.5	4.0	2,287	81.19
BEXIMCO	115.7	104.1	10.0	651	74.48
BXPHERMA	146.5	146.5	1.0	456	66.84
BDFINANCE	43.5	43.5	1.0	1,535	66.75
BSCCL	208.4	199.8	14.0	164	33.19
SQURPHARMA	207.0	204.7	34.0	148	30.42
ANWARGALV	213.3	213.3	1.0	94	20.01
MEGHNALIFE	93.4	89.0	3.0	215	19.58
SALVOCHEM	66.7	61.6	3.0	295	18.67

* 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.
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPEARL	276.0	238.8	171.8	671	33
ISLAMIBANK	35.5	35.5	81.2	2,287	4
BEXIMCO	115.7	104.1	74.5	651	10
BXPHARMA	146.5	146.5	66.8	456	1
BDFINANCE	43.5	43.5	66.8	1,535	1
BSCCL	208.4	199.8	33.2	164	14
SQURPHARMA	207.0	204.7	30.4	148	34
ANWARGALV	213.3	213.3	20.0	94	1
MEGHNALIFE	93.4	89.0	19.6	215	3
SALVOCHEM	66.7	61.6	18.7	295	3
BRACBANK	38.0	34.7	14.3	392	10
DHAKAINS	63.8	63.8	14.1	221	2
OLYMPIC	149.9	149.9	13.4	89	1
MARICO	2,340.0	2,330.0	10.8	5	7
BANKASIA	20.2	20.2	10.1	500	1
BSC	138.6	137.2	9.0	65	3
POWERGRID	54.0	52.3	8.9	165	2
PRIMEINSUR	82.8	82.8	8.4	101	2
TOSRIFA	20.2	20.2	7.5	371	1
SONALIPAPR	570.0	569.0	6.8	12	11
BATBC	479.8	479.8	5.7	12	6
MJLBD	83.0	81.0	5.5	67	2
Total			763.7		211

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
CBLPBOND		0.0%	5.0%	Record Date	15-Feb-23
SINGERBD		0.0%	10.0%	Record Date	16-Feb-23
RAK CERAMIC		0.0%	10.0%	Record Date	16-Feb-23
1STPRIMFMF		0.0%	11.0%	Record Date	19-Feb-23
INTECH		0.0%	0.0%	Record Date	20-Feb-23
SSSTEEL		0.0%	2.0%	Record Date	22-Feb-23
GP		0.0%	95.0%	Record Date	26-Feb-23
OIMEX		0.0%	1.0%	Record Date	27-Feb-23

Important DSE News
OIMEX

The Board of Directors has recommended 1% cash dividend to general shareholders other than Sponsors and Directors for the year ended June 30, 2022. The Sponsors and Directors hold 20,133,184 shares out of total 67,084,781 shares of the Company. General shareholders hold 46,951,597 shares and general shareholders will get cash dividend of Tk. 4,695,159.70. Date of AGM: 30.03.2023, Time: 2:00 PM, Venue: Digital Platform. Record Date: 27.02.2023. The Company has also reported EPS of Tk. (1.65), NAV per share of Tk. 11.72 and NOCFPS of Tk. (0.57) for the year ended June 30, 2022 as against Tk. 0.08, Tk. 13.38 and Tk. 0.88 respectively for the same period of the previous year.

UPGDCL

(Q2 Un-audited): Consolidated EPS was Tk. 4.84 for October-December 2022 as against Tk. 6.85 for October-December 2021; Consolidated EPS was Tk. 9.85 for July-December 2022 as against Tk. 11.84 for July-December 2021. Consolidated NOCFPS was Tk. 9.59 for July-December 2022 as against Tk. (9.22) for July-December 2021. Consolidated NAV per share was Tk. 49.23 as on December 31, 2022 and Tk. 56.38 as on June 30, 2022.

TOSRIFA

Naim Hassan, one of the Sponsor Directors of the company, has expressed his intention to buy 3,71,288 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange within next 30 working days as per Rule-4 of the BSEC (Substantial Acquisition of Shares and Takeovers), Rules, 2018.

BARKAPOWER

Abdul Bari, one of the Directors of the Company, has expressed his intention to sell 47,14,138 shares (in the Block Market) whereas NRB Ventures (Pvt.) Limited and Fusion Holdings (Pvt) Limited, both the Corporate Directors of the company, have expressed their intention to buy 20,45,579 shares and 26,68,559 shares respectively at prevailing market price (in the Block Market) through Dhaka Stock Exchange within next 30 working days.

SHEPHERD

The Company will be placed in 'A' category from existing 'B' category with effect from February 7, 2023 as the Company has reported disbursement of 10% cash dividend for the year ended June 30, 2022.

BDTHAIFOOD

The Company will be placed in 'B' category from existing 'N' category with effect from February 7, 2023 as the Company has reported disbursement of 3% cash dividend for the year ended June 30, 2022.

UPGDCL

The Company has informed that the Company which was formerly known as Malancha Holdings Ltd. entered into Power Supply Agreement (the PSA) dated 06 May 2007 and 16 May 2007 with Bangladesh Export Processing Zones Authority (BEPZA) for installation of commercial power plant in Dhaka EPZ and Chattogram EPZ respectively. The captive power plant rate has been changed recently and increased in such an extent that the selling price of electricity is lower than the raw material price going against the construction, generation, distribution, operation and maintenance of power industry. Under the above circumstances, pursuant to Clause 11(IV) of the Power Supply Agreement the Company has given notice to BEPZA dated 25 January, 2023 declaring the change as a Force Majeure event and for such reason notice for closing down the operation of power plants within Dhaka EPZ and Chattogram EPZ.

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