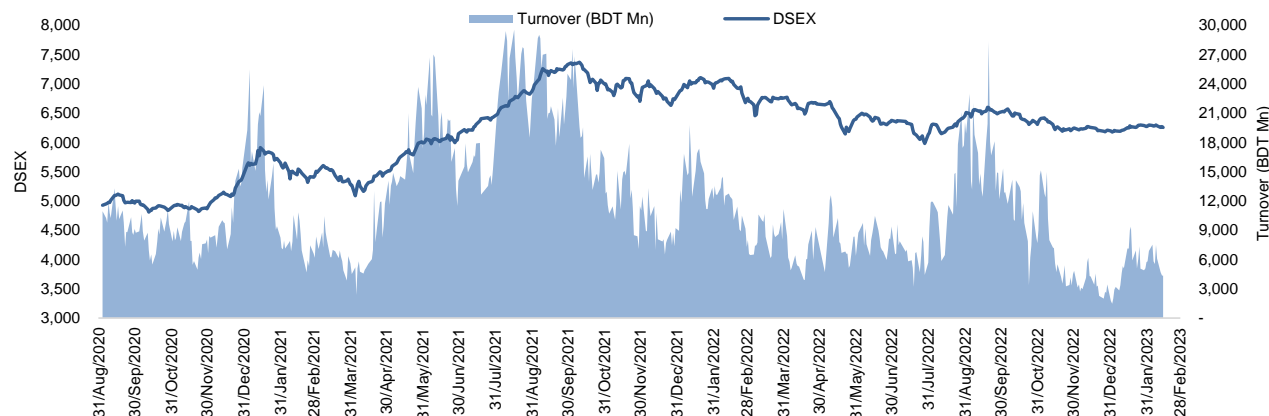


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.23%) lost 14.7 points and closed at 6,256.17. The blue-chip index DS30 (-0.24%), the Shariah-based index DSES (-0.25%), and the large-cap index CDSET (-0.11%) closed at 2,226.66, 1,368.28, and 1,222.82 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.03% followed by Bank (+0.00%), Telecommunication (0.00%). Pharmaceutical experienced the highest loss of 0.3% followed by Fuel & Power (-0.07%), NBF1 (-0.05%), Food & Allied (-0.02%). Block trades contributed 9.3% of the overall market turnover. Olympic Industries Ltd. (+0.3%) was the most traded share with a turnover of BDT 313 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,256.17	6,270.87	-14.70	-0.23%	+0.8%
DS30	2,226.66	2,232.09	-5.43	-0.24%	+1.4%
DSES	1,368.28	1,371.66	-3.38	-0.25%	+0.7%
CDSET	1,222.82	1,224.18	-1.36	-0.11%	+0.7%

	Advanced	Declined	Unchanged	Total
All Category	27	147	146	320
A Category (Equity)	16	89	112	217
B Category (Equity)	10	47	29	86
N Category (Equity)	0	3	1	4
Z Category (Equity)	1	8	4	13
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	7,643,206	7,653,329	-0.1%
	Mn USD	72,444	72,540	
Turnover	Mn BDT	4,331	4,354	-0.5%
	Mn USD	41	41	
Volume	Mn Shares	61	55	+10.2%
	No. of Trade	91,685	83,061	+10.4%

* Average Interbank Exchange Rate is BDT 105.51 as of Feb 13, 2023

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Figure: Sectorial Turnover (BDT Mn)

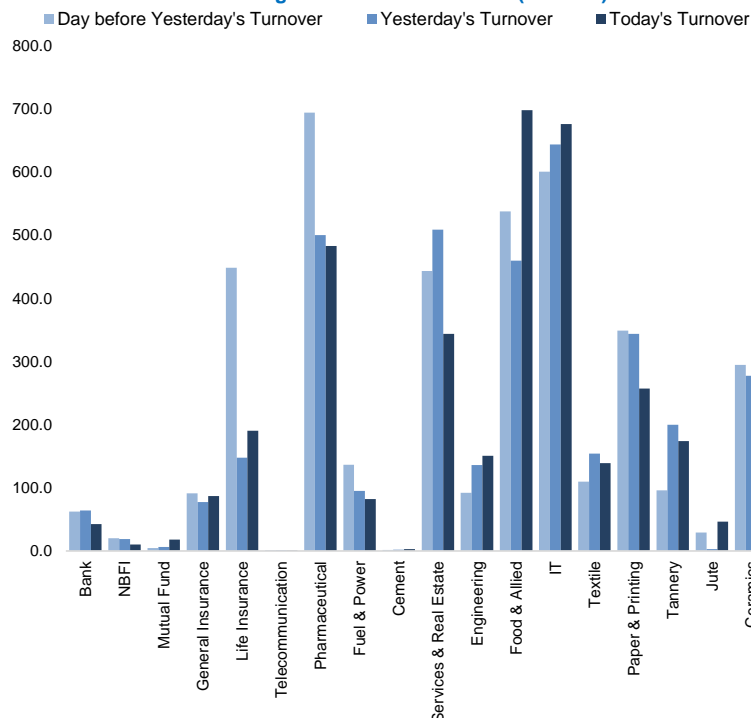
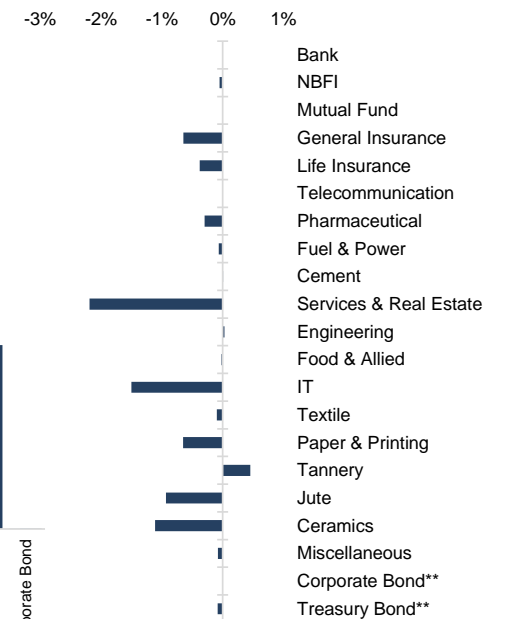


Figure: Sectorial Mcap Change



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	1,434	1,434	+0.03	+0.00%	34	669,935	8.9%	42.4	1.1%	7.8x	0.7x	GP	386,996	8.6%	0.8	12.9x	8.4x
NBFI	1,925	1,926	-0.96	-0.05%	23	187,810	2.5%	10.1	0.3%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	849	849	-0.10	-0.01%	37	38,386	0.5%	18.0	0.5%	NM	0.8x	BATBC	280,098	6.2%	0.3	15.7x	6.8x
General Insurance	3,198	3,219	-20.80	-0.65%	42	93,345	1.2%	86.8	2.2%	15.6x	1.5x	SQURPHARMA	185,977	4.1%	1.1	9.7x	1.8x
Life Insurance	2,555	2,565	-9.66	-0.38%	14	71,664	0.9%	190.2	4.8%	NM	NM	ROBI	157,138	3.5%	0.1	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.9	0.0%	17.4x	4.7x	RENATA	139,689	3.1%	0.4	31.1x	4.7x
Pharmaceutical	3,757	3,768	-11.23	-0.30%	34	728,814	9.6%	482.8	12.3%	18.8x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,692	1,693	-1.10	-0.07%	23	446,246	5.9%	82.0	2.1%	17.8x	1.1x	BEXIMCO	103,571	2.3%	0.4	9.0x	1.2x
Cement	2,313	2,313	+0.17	+0.01%	7	111,079	1.5%	2.9	0.1%	65.0x	2.5x	BERGERPBL	80,053	1.8%	1.6	27.1x	6.7x
Services & Real Est	2,167	2,215	-48.50	-2.19%	8	85,606	1.1%	343.6	8.7%	36.4x	1.1x	MARICO	76,277	1.7%	0.1	20.7x	28.6x
Engineering	4,488	4,486	+1.27	+0.03%	42	526,717	7.0%	150.8	3.8%	53.9x	2.1x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,469	21,473	-4.31	-0.02%	21	382,542	5.1%	697.6	17.8%	19.9x	7.7x	BEACONPHAR	69,947	1.6%	28.3	74.6x	11.3x
IT	3,226	3,276	-49.20	-1.50%	11	42,063	0.6%	675.7	17.2%	30.6x	2.9x	BXPBARMA	65,222	1.4%	49.9	14.1x	1.6x
Textile	1,583	1,585	-1.50	-0.09%	58	166,872	2.2%	139.1	3.5%	42.8x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	11,280	11,354	-73.86	-0.65%	6	43,462	0.6%	257.2	6.5%	42.9x	2.2x	ISLAMIBANK	53,452	1.2%	4.1	10.9x	0.8x
Tannery	3,122	3,108	+14.16	+0.46%	6	32,977	0.4%	174.0	4.4%	47.7x	3.2x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	13,325	13,450	-125.21	-0.93%	3	3,260	0.0%	46.6	1.2%	NM	5.1x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	707	715	-7.95	-1.11%	5	32,716	0.4%	235.5	6.0%	42.2x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,112	4,115	-3.10	-0.08%	14	223,885	3.0%	291.0	7.4%	13.3x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.7x	0.9x
Corporate Bond**	88	88	-	-	10	36,619	0.5%	0.0	0.0%	NM	NM	BSCCL	36,098	0.8%	0.0	14.3x	2.9x
Treasury Bond**	96	96	-0.08	-0.08%	252	3,062,686	40.5%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NAVANACNG	24.2	+8.0%	14.0	NM	0.7x
STANDARINS	46.7	+7.6%	0.0	22.7x	2.3x
BDCOM	42.8	+4.9%	115.1	30.1x	2.8x
EMERALDOIL	30.4	+4.8%	4.4	NM	1.9x
BENGALWTL	37.7	+3.6%	40.2	71.1x	1.5x
DSHGARME	113.4	+3.4%	5.5	NM	6.3x
MONNOAGML	960.8	+2.6%	53.6	NM	6x
FINEFOODS	63.9	+2.1%	75.3	NM	6.1x
SILVAPHL	22.2	+1.8%	55.0	38.9x	1.3x
AL-HAJTEX	152.1	+1.7%	95.2	NM	16.1x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.2%	9.7x	1.8x
BATBC	74,086	4.4%	15.7x	6.8x
RENATA	68,042	4.0%	31.1x	4.7x
BEXIMCO	67,680	4.0%	9.0x	1.2x
BEACONPHAR	46,246	2.7%	74.6x	11.3x
BXPBARMA	45,564	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	26,980	1.6%	18.4x	4.1x
ISLAMIBANK	23,876	1.4%	10.9x	0.8x
NBL	19,116	1.1%	NM	0.6x
PUBALIBANK	18,525	1.1%	5.5x	0.6x
CITYBANK	18,211	1.1%	4.5x	0.8x
ROBI	15,714	0.9%	NM	2.4x
OLYMPIC	14,712	0.9%	19.8x	3.2x
ALARABANK	14,483	0.9%	14.6x	1.1x
BSRMLTD	14,210	0.8%	NM	0.7x
UPGDCL	13,547	0.8%	15.4x	4.7x
SUMITPOWER	13,369	0.8%	10.7x	0.9x
PRIMEBANK	13,216	0.8%	6.6x	0.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
OLYMPIC	152.0	+0.3%	312.8	19.8x	3.2x
GENEXIL	99.9	-3.2%	294.5	30.2x	5.4x
BSC	138.3	-1.3%	275.7	9.6x	1.8x
GEMINISEA	487.2	-3.1%	193.1	34.7x	28.4x
APEXFOOT	330.6	+1.5%	169.1	26.6x	1.4x
SPCERAMICS	48.6	-3.6%	168.7	90.0x	1.6x
SEAPEARL	282.8	-1.9%	153.0	68.6x	20.0x
ORIONPHARM	85.5	-1.8%	124.4	24.4x	0.9x
BDCOM	42.8	+4.9%	115.1	30.1x	2.8x
ORIONINFU	386.4	-2.1%	113.0	NM	28.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BDTHAIFOOD	36.9	-4.2%	27.8	78.5x	2.5x
EHL	96.6	-4.1%	102.4	15.2x	1x
CITYGENINS	28.4	-4.1%	11.3	12.6x	1.5x
AAMRANET	61.7	-3.7%	101.1	19.3x	1.6x
SPCERAMICS	48.6	-3.6%	168.7	90.0x	1.6x
HWAWELLTEX	47.0	-3.5%	4.6	NM	1.3x
MONOSPOOL	280.0	-3.3%	49.6	37.5x	6.0x
BPML	81.2	-3.2%	101.2	22.4x	1.1x
UNIQUEHRL	63.4	-3.2%	35.3	14.1x	0.7x
GENEXIL	99.9	-3.2%	294.5	30.2x	5.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
DHAKAINS	69.0	62.9	2.0	699	46.01
SEAPEARL	285.0	263.3	4.0	124	32.84
SQURPHARMA	204.0	202.0	37.0	137	27.86
ADNTEL	127.8	121.0	5.0	223	27.80
NBL	8.2	7.8	8.0	3,259	26.09
IPDC	57.4	51.9	8.0	458	25.55
BENGALWTL	35.5	34.2	5.0	520	18.01
RUPALILIFE	88.0	88.0	1.0	200	17.60
GP	265.0	261.6	14.0	62	16.18
BXPBARMA	146.7	146.7	2.0	100	14.67

* 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
DHAKAINS	69.0	62.9	46.0	699	2
SEAPPEARL	285.0	263.3	32.8	124	4
SQURPHARMA	204.0	202.0	27.9	137	37
ADNTEL	127.8	121.0	27.8	223	5
NBL	8.2	7.8	26.1	3,259	8
IPDC	57.4	51.9	25.6	458	8
BENGALWTL	35.5	34.2	18.0	520	5
RUPALILIFE	88.0	88.0	17.6	200	1
GP	265.0	261.6	16.2	62	14
BXPBARMA	146.7	146.7	14.7	100	2
RELIANCINS	61.0	61.0	12.0	197	1
AL-HAJTEX	145.1	135.1	11.9	83	7
MARICO	2,350.0	2,306.0	6.8	3	9
APEXFOOT	338.0	338.0	6.8	20	1
SALVOCHEM	61.9	61.8	6.7	109	3
AAMRANET	65.0	65.0	6.2	95	1
BEXIMCO	115.7	104.1	6.1	55	5
ACIFORMULA	156.0	140.0	5.9	41	2
RDFOOD	36.2	32.6	5.5	165	8
FORTUNE	83.2	68.2	5.2	70	6
FINEFOODS	63.5	62.0	4.5	72	3
ACI	250.1	245.0	4.5	18	5
Total			403.6		218

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
RAKCERAMIC		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
BATBC		0.0%	100.0%	Record Date	02-Mar-23
RELIANCINS		0.0%	25.0%	Record Date	06-Mar-23
PREMIERCEM		0.0%	10.0%	Record Date	06-Mar-23
CITYGENINS		0.0%	10.5%	Record Date	07-Mar-23

Important DSE News
CITYGENINS

The Board of Directors has recommended 10.50% Cash Dividend for the year ended December 31, 2022. Date of AGM: 30.03.2023, Time: 2:30 PM, Venue: Digital Platform. Record date: 07.03.2023. The Company has also reported EPS of Tk. 2.25, NAV per share of Tk. 18.57 and NOCFPS of Tk. 5.59 for the year ended December 31, 2022 as against Tk. 1.68, Tk. 17.53 and Tk. 2.75 respectively for the same period of the previous year.

VAMLRBBF

The Trustee Committee of the fund has declared No dividend for the year ended December 31, 2022. Record date: 07.03.2023. The Trustee of the Fund has also reported EPU of Tk. (0.07), NAV per unit at market price of Tk. 10.22, NAV per unit at cost price of Tk. 10.72 and NOCFPU of Tk. 0.21 for the year ended December 31, 2022 as against Tk. 1.30, Tk. 11.96, Tk. 11.30 and Tk. 0.15 respectively for the same period of the previous year.

BDTHAIFOOD

(Q2 Un-audited): EPS was Tk. 0.18 for October-December 2022 as against Tk. 0.16 for October-December 2021; EPS was Tk. 0.47 for July-December 2022 as against Tk. 0.31 for July-December 2021. NOCFPS was Tk. 0.18 for July-December 2022 as against Tk. (0.39) for July-December 2021. NAV per share was Tk. 14.59 as on December 31, 2022 and Tk. 14.12 as on June 30, 2022.

PREMIERCEM

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2022. Date of AGM: 28.03.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 06.03.2023. The Company has also reported Consolidated EPS of Tk. (10.70), Consolidated NAV per share of Tk. 67.13 and Consolidated NOCFPS of Tk. 5.26 for the year ended June 30, 2022 as against Tk. 6.18, Tk. 79.83 and Tk. 6.31 respectively for the same period of the previous year.

(Q1 Un-audited): Consolidated EPS was Tk. (2.53) for July-September 2022 as against Tk. 0.12 for July-September 2021; Consolidated NOCFPS was Tk. 2.80 for July-September 2022 as against Tk. 2.87 for July-September 2021. Consolidated NAV per share was Tk. 64.60 as on September 30, 2022 and Tk. 67.13 as on June 30, 2022. Reason for deviation in EPS: EPS has been decreased due to increase in cost of sales.

(Q2 Un-audited): Consolidated EPS was Tk. 0.07 for October-December 2022 as against Tk. 0.11 for October-December 2021; Consolidated EPS was Tk. (2.45) for July-December 2022 as against Tk. 0.23 for July-December 2021. Consolidated NOCFPS was Tk. 5.44 for July-December 2022 as against Tk. 3.01 for July-December 2021. Consolidated NAV per share was Tk. 64.67 as on December 31, 2022 and Tk. 67.13 as on June 30, 2022.

AL-HAJTEX

(Q2 Un-audited): EPS was Tk. (0.21) for October-December 2022 as against Tk. 0.09 for October-December 2021; EPS was Tk. (0.05) for July-December 2022 as against Tk. 0.12 for July-December 2021. NOCFPS was Tk. (0.53) for July-December 2022 as against Tk. 0.95 for July-December 2021. NAV per share was Tk. 9.47 as on December 31, 2022 and Tk. 9.52 as on June 30, 2022.

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