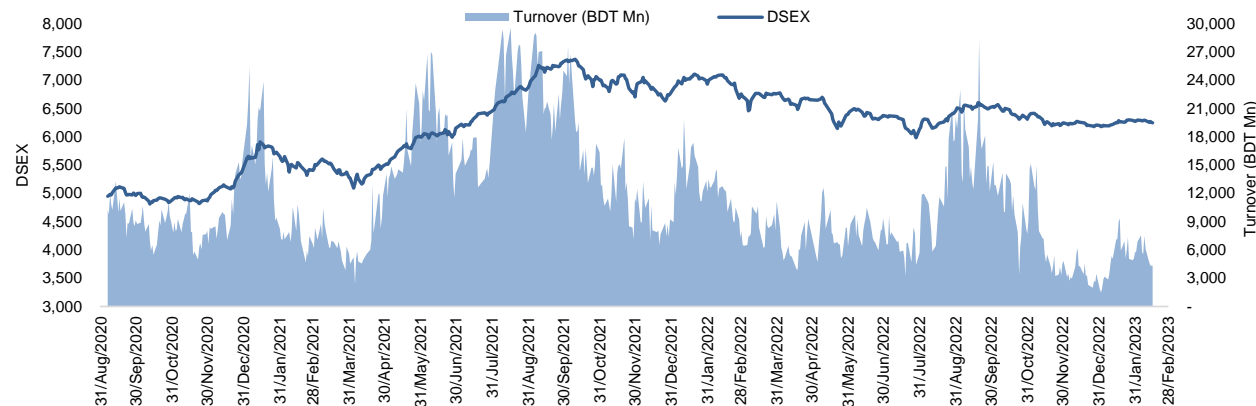


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.18%) lost 11.15 points and closed at 6,245.02. The blue-chip index DS30 (-0.21%), the Shariah-based index DSES (-0.10%), and the large-cap index CDSET (-0.11%) closed at 2,222.02, 1,366.85, and 1,221.51 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.20% followed by Pharmaceutical (-0.16%), Bank (-0.06%), NBFi (-0.03%), Fuel & Power (-0.02%), Telecommunication (0.00%), and Engineering (+0.10%), respectively. Block trades contributed 14.7% of the overall market turnover. Sonali Paper & Board Mills Ltd. (-0.9%) was the most traded share with a turnover of BDT 370 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,245.02	6,256.17	-11.15	-0.18%	+0.6%
DS30	2,222.02	2,226.66	-4.64	-0.21%	+1.2%
DSES	1,366.85	1,368.28	-1.44	-0.10%	+0.6%
CDSET	1,221.51	1,222.82	-1.31	-0.11%	+0.6%

	Advanced	Declined	Unchanged	Total
All Category	27	140	147	314
A Category (Equity)	17	85	113	215
B Category (Equity)	10	42	28	80
N Category (Equity)	0	3	2	5
Z Category (Equity)	0	10	4	14
Mutual Funds	0	3	13	16
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,643,434	7,643,206	+0.0%
	Mn USD	71,434	71,432	
Turnover	Mn BDT	4,315	4,331	-0.4%
	Mn USD	40	40	
Volume	Mn Shares	53	61	-13.0%
	No. of Trade	86,622	91,685	-5.5%

* Average Interbank Exchange Rate is BDT 107.00 as of Feb 14, 2023

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md. Tanvir Ahmed Research Associate (880) 1708805201 mtanvir.ahmed@bracepl.com
---	--

Figure: Sectorial Turnover (BDT Mn)

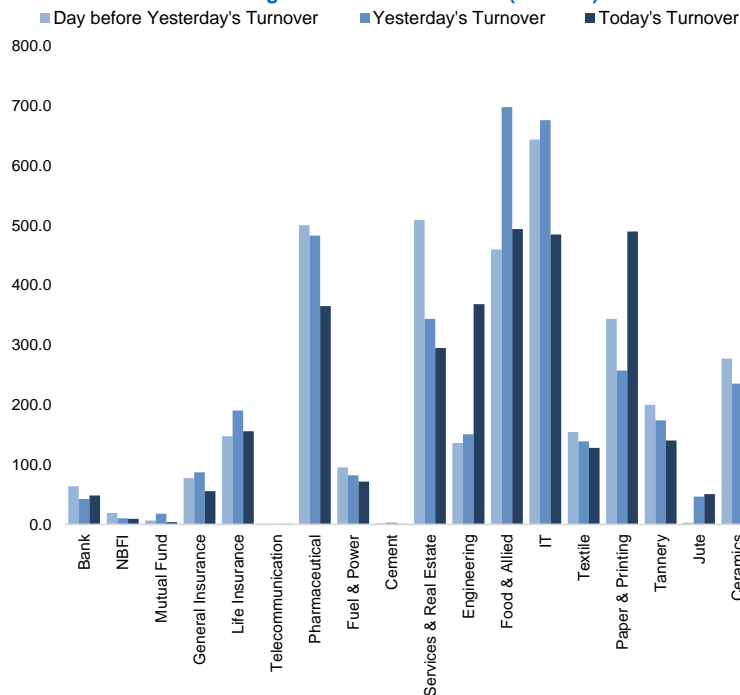
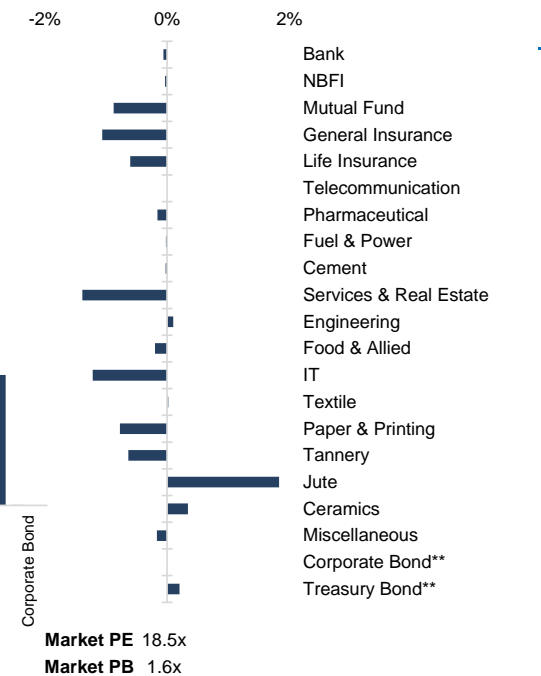


Figure: Sectorial Mcap Change



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	1,433	1,434	-0.83	-0.06%	34	669,547	8.8%	48.3	1.3%	7.8x	0.7x	GP	386,996	8.6%	0.7	12.9x	8.4x
NBFI	1,925	1,925	-0.63	-0.03%	23	187,748	2.5%	9.4	0.3%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	826	833	-7.26	-0.87%	37	37,333	0.5%	3.6	0.1%	NM	0.7x	BATBC	280,098	6.2%	0.4	15.7x	6.8x
General Insurance	3,164	3,198	-33.86	-1.06%	42	92,357	1.2%	55.5	1.5%	15.5x	1.5x	SQURPHARMA	185,977	4.1%	1.1	9.7x	1.8x
Life Insurance	2,540	2,555	-15.34	-0.60%	14	71,234	0.9%	155.8	4.2%	NM	NM	ROBI	157,138	3.5%	0.0	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.0	0.0%	17.4x	4.7x	RENATA	139,689	3.1%	1.0	31.1x	4.7x
Pharmaceutical	3,751	3,757	-5.85	-0.16%	34	727,680	9.6%	364.9	9.9%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.1	15.4x	4.7x
Fuel & Power	1,691	1,692	-0.35	-0.02%	23	446,153	5.9%	71.8	2.0%	17.8x	1.1x	BEXIMCO	103,571	2.3%	0.2	9.0x	1.2x
Cement	2,312	2,313	-0.52	-0.02%	7	111,054	1.5%	0.9	0.0%	64.9x	2.5x	BERGERPBL	80,150	1.8%	1.1	27.1x	6.7x
Services & Real Esta	2,137	2,167	-30.00	-1.38%	8	84,421	1.1%	295.0	8.0%	35.9x	1.1x	MARICO	76,277	1.7%	0.1	20.7x	28.6x
Engineering	4,492	4,488	+4.46	+0.10%	42	527,240	7.0%	368.2	10.0%	54.0x	2.1x	ICB	74,119	1.6%	0.1	NM	1.7x
Food & Allied	21,427	21,469	-42.09	-0.20%	21	381,792	5.0%	493.8	13.4%	19.8x	7.7x	BEACONPHAR	69,762	1.6%	35.8	74.4x	11.3x
IT	3,187	3,226	-39.28	-1.22%	11	41,551	0.5%	484.4	13.2%	30.3x	2.9x	BXPHERMA	65,222	1.5%	5.6	14.1x	1.6x
Textile	1,584	1,583	+0.31	+0.02%	58	166,904	2.2%	128.0	3.5%	42.8x	1.0x	BRACBANK	57,619	1.3%	0.2	10.9x	1.0x
Paper & Printing	11,193	11,280	-86.94	-0.77%	6	43,127	0.6%	489.8	13.3%	42.6x	2.2x	ISLAMIBANK	53,452	1.2%	4.0	10.9x	0.8x
Tannery	3,103	3,122	-19.75	-0.63%	6	32,768	0.4%	140.3	3.8%	47.4x	3.1x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	13,569	13,325	+243.96	+1.83%	3	3,319	0.0%	50.8	1.4%	NM	5.2x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	710	707	+2.43	+0.34%	5	32,828	0.4%	298.7	8.1%	42.4x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,105	4,112	-6.80	-0.17%	14	223,515	3.0%	218.1	5.9%	13.3x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.7x	0.9x
Corporate Bond**	88	88	-	-	9	36,415	0.5%	0.2	0.0%	NM	NM	BSCCL	36,098	0.8%	0.3	14.3x	2.9x
Treasury Bond**	96	96	+0.20	+0.20%	252	3,068,929	40.6%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	
BDLAMPS	274.2	+8.7%	147.5	36.7x	3.1x	SQURPHARMA	121,685	7.2%	9.7x	1.8x	SONALIPAPR	696.6	-0.9%	370.4	74.5x	4.1x
BEACHHATCH	37.9	+7.4%	116.1	47.4x	3.7x	BATBC	74,086	4.4%	15.7x	6.8x	GENEXIL	97.5	-2.4%	220.4	29.5x	5.3x
MONNOAGML	1,015.8	+5.7%	74.4	NM	5.8x	BEXIMCO	71,930	4.3%	9.0x	1.2x	SPCERAMICS	48.0	-1.2%	200.8	88.9x	1.5x
BENGALWTL	39.8	+5.6%	93.6	75.1x	1.6x	RENATA	68,196	4.0%	31.1x	4.7x	BSC	134.9	-2.5%	192.3	9.3x	1.8x
AMCL(PRAN)	266.9	+5.4%	38.9	51.0x	3.1x	BEACONPHAR	48,833	2.9%	74.4x	11.3x	BDLAMPS	274.2	+8.7%	147.5	36.7x	3.1x
MONNOCERA	114.5	+5.0%	96.6	NM	1.4x	BXPHERMA	45,538	2.7%	14.1x	1.6x	SEAPEARL	276.7	-2.2%	145.2	67.2x	19.5x
DSHGARME	118.8	+4.8%	7.3	NM	7x	GP	38,700	2.3%	12.9x	8.4x	APEXFOOT	324.1	-2.0%	138.0	26.1x	1.4x
BDAUTOCA	125.7	+4.3%	8.4	NM	17.4x	BRACBANK	30,976	1.8%	10.9x	1.0x	AAMRANET	62.6	+1.5%	127.3	19.6x	1.6x
FINEFOODS	66.3	+3.8%	54.7	NM	6.3x	LHBL	26,581	1.6%	18.4x	4.1x	GEMINISEA	475.1	-2.5%	126.3	33.9x	27.7x
RANFOUNDRY	161.9	+3.3%	12.3	43.1x	5.3x	ISLAMIBANK	24,010	1.4%	10.9x	0.8x	ORIONINFU	366.8	-5.1%	120.7	NM	27.4x

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)
GLDNJMF	6.9	-30.3%	1.5	NM	0.7x	ANWARGALV	213.3	195.3	6.0	792	168.71
ORIONINFU	366.8	-5.1%	120.7	NM	27x	IPDC	57.5	51.9	12.0	2,666	146.57
RELIANCINS	58.4	-4.9%	3.0	10.2x	0.9x	BDCOM	46.2	42.4	7.0	1,740	79.94
PRAGATIINS	61.7	-4.5%	5.1	10.5x	1.1x	ADNTEL	127.5	120.0	2.0	135	17.04
PRAGATILIF	120.9	-3.0%	36.5	NM	NM	AL-HAJTEX	152.1	145.0	5.0	105	15.70
NCCBLMF1	7.0	-2.8%	0.5	NM	0.8x	GP	262.6	261.6	14.0	57	14.89
OLYMPIC	147.8	-2.8%	99.3	19.2x	3.1x	SEAPEARL	281.9	273.0	2.0	52	14.28
POPULARLIF	68.6	-2.7%	10.3	NM	NM	SQURPHARMA	202.0	201.0	17.0	70	14.08
EGEN	46.2	-2.5%	13.4	31.9x	2.1x	LHBL	65.1	60.5	16.0	217	13.61
GEMINISEA	475.1	-2.5%	126.3	33.9x	27.7x	DHAKAINS	68.2	68.2	1.0	197	13.44

* 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
ANWARGALV	213.3	195.3	168.7	792	6
IPDC	57.5	51.9	146.6	2,666	12
BDCOM	46.2	42.4	79.9	1,740	7
ADNTEL	127.5	120.0	17.0	135	2
AL-HAJTEX	152.1	145.0	15.7	105	5
GP	262.6	261.6	14.9	57	14
SEAPEARL	281.9	273.0	14.3	52	2
SQURPHARMA	202.0	201.0	14.1	70	17
LHBL	65.1	60.5	13.6	217	16
DHAKAINS	68.2	68.2	13.4	197	1
METROSPIN	41.0	41.0	13.2	322	1
SONALIPAPR	700.0	694.5	11.3	16	2
BEXIMCO	115.6	104.1	10.2	97	9
RENATA	1,142.1	1,141.8	8.1	7	7
DELTALIFE	136.5	136.5	6.8	50	2
NBL	8.3	8.3	6.1	740	1
MARICO	2,311.0	2,300.5	6.0	3	4
BXPHARMA	147.5	147.5	5.9	40	1
BSC	145.0	140.0	5.8	41	2
RDFOOD	32.7	32.6	5.7	175	8
BENGALWTL	37.7	37.0	5.2	139	5
MONNOAGML	980.0	960.0	4.9	5	2
Total			636.4		184

Important DSE News

LHBL

The Company has informed that Mr. Mohammad Iqbal Chowdhury has been appointed as a Director of the Board of Directors and as the Chief Executive Officer of the Company with immediate effect.

INTECH

The company has informed that to mitigate current liquidity crisis of the Company, the Board of Directors has approved to provide lease of 30 acres unused land at Tarakanda, Mymensingh for yearly BDT 70,000.00 per acre only to Biswas Agro Fisheries Ltd. for next 05 years from March 2023 to February 2028.

SEAPEARL

The company has informed that transfer of 48,780,900 shares of Sea Pearl Beach Resort & Spa Limited from Shamim Enterprise (Pvt.) Ltd. (the transferor), one of the sponsor directors of the Company to Seapearl Sundarban Eco Resort Ltd. (the transferee) has been completed outside the trading system of the exchange as per declaration disseminated on 09.02.2023.

GLDNJMF

The Trustee Board of the fund has approved 1.20% Cash Dividend based on Net Income for the period ended December 31, 2022. Record date: 09.03.2023. The Fund has reported EPU of Tk. 0.13 and NOCFPU of Tk. 0.14 for the period from May 18, 2022 to December 31, 2022. The Fund has also reported NAV per unit at market price of Tk. 10.13 and NAV per unit at cost price of Tk. 10.21 as on December 31, 2022.

NCCBLMF1

The Trustee Board of the fund has approved 6% Cash Dividend based on Net Income and Retained Earnings for the year ended December 31, 2022. Record date: 09.03.2023. The Fund has also reported EPU of Tk. 0.42, NAV per unit at market price of Tk. 11.43, NAV per unit at cost price of Tk. 10.76 and NOCFPU of Tk. (0.34) for the year ended December 31, 2022 as against Tk. 1.40, Tk. 12.83, Tk. 11.54 and Tk. (2.77) respectively for the same period of the previous year.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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%	Record Date	2-Mar-23
RELIANCINS		0.0%	25.0%	Record Date	6-Mar-23
PREMIERCEM		0.0%	10.0%	Record Date	6-Mar-23
CITYGENINS		0.0%	10.5%	Record Date	7-Mar-23

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.