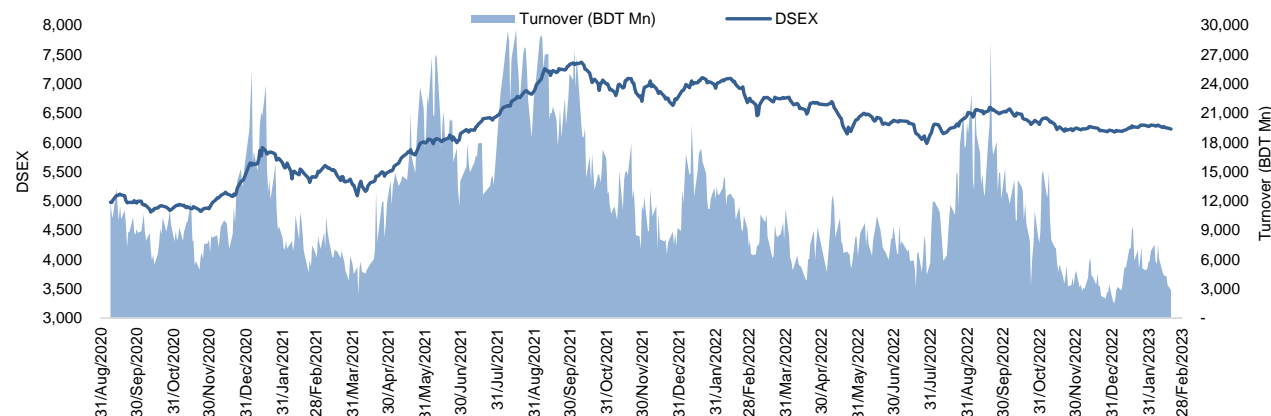


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.29%) lost 18.27 points and closed at 6,227.94. The blue-chip index DS30 (-0.12%), the Shariah-based index DSES (-0.32%), and the large-cap index CDSET (-0.04%) closed at 2,221.51, 1,362.19, and 1,221.14 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.34% followed by Pharmaceutical (-0.18%), Fuel & Power (-0.08%), Engineering (-0.05%), NBF1 (-0.02%), Telecommunication (0.00%), and Bank (+0.00%), respectively. Block trades contributed 14.6% of the overall market turnover. Bangladesh Shipping Corporation (-2.6%) was the most traded share with a turnover of BDT 270 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,227.94	6,246.21	-18.27	-0.29%	+0.3%
DS30	2,221.51	2,224.20	-2.68	-0.12%	+1.2%
DSES	1,362.19	1,366.62	-4.43	-0.32%	+0.2%
CDSET	1,221.14	1,221.68	-0.54	-0.04%	+0.6%

	Advanced	Declined	Unchanged	Total
All Category	18	150	133	301
A Category (Equity)	13	88	105	206
B Category (Equity)	2	50	26	78
N Category (Equity)	0	3	2	5
Z Category (Equity)	3	9	0	12
Mutual Funds	2	1	15	18
Corporate Bonds	0	1	0	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,631,167	7,638,487	-0.1%
	Mn USD	73,019	73,089	-0.1%
Turnover	Mn BDT	2,852	3,403	-16.2%
	Mn USD	27	33	-16.2%
Volume	Mn Shares	37	42	-12.3%
	No. of Trade	62,627	74,615	-16.1%

\* Average Interbank Exchange Rate is BDT 104.51 as of Feb 16, 2023

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Figure: Sectorial Turnover (BDT Mn)

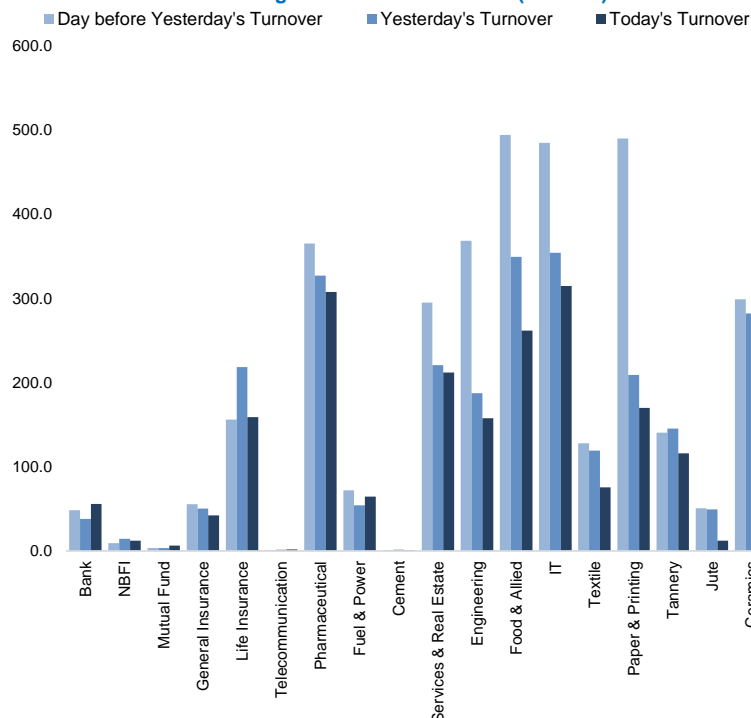
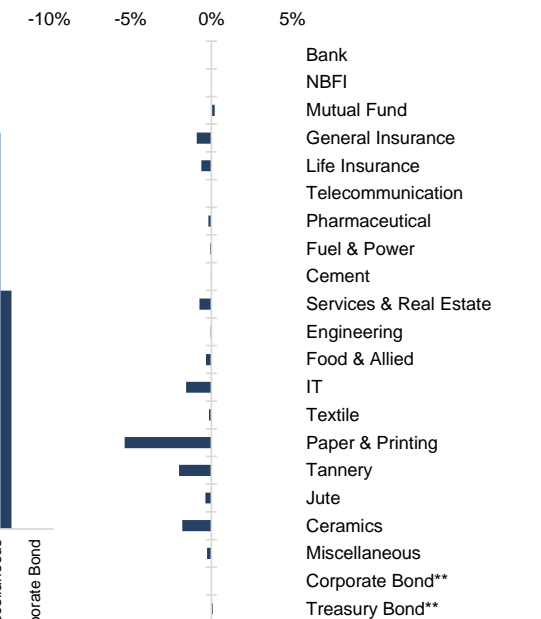


Figure: Sectorial Mcap Change



Market PE 18.3x

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	1,433	1,433	+0.05	+0.00%	34	669,310	8.9%	55.9	2.3%	7.8x	0.7x	GP	386,996	8.6%	0.9	12.9x	8.4x
NBFI	1,924	1,924	-0.39	-0.02%	23	187,708	2.5%	12.1	0.5%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	828	827	+1.64	+0.20%	37	37,462	0.5%	6.3	0.3%	NM	0.7x	BATBC	280,098	6.2%	0.7	15.7x	6.8x
General Insurance	3,127	3,155	-28.72	-0.91%	42	91,253	1.2%	42.4	1.7%	15.3x	1.5x	SQURPHARMA	185,977	4.1%	0.6	9.7x	1.8x
Life Insurance	2,534	2,549	-15.54	-0.61%	14	71,056	0.9%	158.7	6.5%	NM	NM	ROBI	157,138	3.5%	1.0	85.7x	2.3x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.9	0.1%	16.8x	4.6x	RENATA	139,689	3.1%	0.1	31.1x	4.7x
Pharmaceutical	3,745	3,752	-6.93	-0.18%	34	726,497	9.6%	307.6	12.6%	18.8x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,690	1,691	-1.29	-0.08%	23	445,734	5.9%	64.5	2.6%	17.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	9.0x	1.2x
Cement	2,311	2,312	-0.52	-0.02%	7	111,004	1.5%	0.9	0.0%	66.7x	2.5x	BERGERPBL	80,234	1.8%	4.8	27.2x	6.7x
Services & Real Est	2,134	2,150	-15.98	-0.74%	8	84,324	1.1%	211.9	8.7%	35.8x	1.1x	MARICO	76,277	1.7%	0.1	20.7x	28.6x
Engineering	4,488	4,491	-2.13	-0.05%	42	526,796	7.0%	157.7	6.5%	53.9x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,354	21,427	-72.81	-0.34%	21	380,495	5.0%	261.7	10.7%	19.8x	7.6x	BEACONPHAR	70,432	1.6%	83.8	75.1x	11.4x
IT	3,164	3,214	-49.97	-1.55%	11	41,253	0.5%	314.7	12.9%	30.1x	2.8x	BXPHERMA	65,222	1.5%	1.6	14.1x	1.6x
Textile	1,580	1,582	-2.35	-0.15%	58	166,506	2.2%	75.4	3.1%	42.7x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,510	11,104	-593.86	-5.35%	6	40,493	0.5%	169.9	7.0%	40.0x	2.0x	ISLAMIBANK	53,452	1.2%	4.7	10.9x	0.8x
Tannery	3,057	3,119	-62.37	-2.00%	6	32,282	0.4%	115.9	4.8%	46.7x	3.1x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	13,485	13,535	-49.16	-0.36%	3	3,299	0.0%	12.1	0.5%	NM	5.2x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	694	707	-12.72	-1.80%	5	32,115	0.4%	183.9	7.5%	41.6x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,104	4,114	-10.60	-0.26%	14	223,457	3.0%	282.9	11.6%	13.3x	1.8x	SUMITPOWER	36,308	0.8%	0.2	10.7x	0.9x
Corporate Bond**	88	88	-	-	9	36,415	0.5%	0.0	0.0%	NM	NM	BSCCL	36,098	0.8%	0.1	14.3x	2.9x
Treasury Bond**	96	96	+0.08	+0.09%	252	3,066,182	40.6%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GLDNJMF	8.2	+9.3%	5.4	NM	0.8x
MONNOAGML	1,063.3	+5.7%	79.3	NM	6.1x
JUTESPINN	257.5	+3.7%	1.1	NM	NM
EMERALDOIL	31.0	+3.3%	8.9	NM	2.0x
DULAMIACOT	73.0	+1.8%	0.0	54.5x	NM
RUPALILIFE	88.0	+1.5%	44.6	NM	NM
NCCBLMF1	7.1	+1.4%	0.6	NM	1x
RENWICKJA	789.1	+1.3%	0.0	NM	NM
ANLIMAYARN	31.2	+1.0%	3.0	NM	3.0x
BEACONPHAR	304.9	+0.9%	83.8	75.1x	11.4x

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%	15.7x	6.8x
BEXIMCO	71,930	4.3%	9.0x	1.2x
RENATA	68,196	4.0%	31.1x	4.7x
BEACONPHAR	49,302	2.9%	75.1x	11.4x
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	26,581	1.6%	18.4x	4.1x
ISLAMIBANK	24,010	1.4%	10.9x	0.8x
NBL	19,116	1.1%	NM	0.6x
SEAPALIBANK	18,525	1.1%	5.5x	0.6x
SEAPEARL	17,919	1.1%	67.7x	19.7x
CITYBANK	17,615	1.0%	4.5x	0.8x
OLYMPIC	17,404	1.0%	18.7x	3.0x
ROBI	15,714	0.9%	85.7x	2.3x
ALARABANK	14,609	0.9%	14.6x	1.1x
BSRMLTD	14,417	0.9%	NM	0.7x
PRIMEBANK	13,876	0.8%	6.5x	0.7x
UPGDCL	13,547	0.8%	15.4x	4.7x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BSC	135.0	-2.6%	269.6	9.3x	1.8x
SPCERAMICS	43.6	-7.8%	133.6	80.7x	1.4x
GENEXIL	95.7	-2.9%	121.2	28.9x	5.2x
OLYMPIC	143.5	-3.4%	115.1	18.7x	3.0x
APEXFOOT	298.9	-8.1%	114.3	24.1x	1.3x
GEMINISEA	437.7	-7.6%	105.6	31.2x	25.5x
SEAPEARL	279.1	+0.1%	99.4	67.7x	19.7x
ORIONPHARM	81.8	-3.7%	95.1	23.3x	0.9x
BEACONPHAR	304.9	+0.9%	83.8	75.1x	11.4x
MONNOAGML	1,063.3	+5.7%	79.3	NM	6.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
APEXFOOT	298.9	-8.1%	114.3	24.1x	1.3x
SPCERAMICS	43.6	-7.8%	133.6	80.7x	1x
GEMINISEA	437.7	-7.6%	105.6	31.2x	25.5x
SONALIPAPR	638.2	-7.5%	62.8	68.3x	3.7x
INTRACO	29.9	-7.1%	56.3	19.7x	2.4x
PRAGATILIF	115.8	-5.5%	30.6	NM	NM
METROSPIN	38.2	-5.0%	11.3	39.1x	1.8x
BDLAMPS	254.3	-4.9%	29.7	34.0x	2.8x
ORIONINFU	344.9	-4.3%	63.6	NM	25.8x
MONOSPOOL	264.0	-4.2%	28.0	35.4x	5.6x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SEAPEARL	278.5	254.6	7.0	174	46.97
BSC	148.0	139.0	3.0	329	45.83
SONALIPAPR	715.0	676.0	4.0	61	43.05
SQURPHARMA	209.0	198.0	42.0	187	37.35
METROSPIN	44.0	38.0	2.0	697	28.42
IPDC	57.5	51.9	6.0	476	27.01
SALVOCHEM	61.9	61.8	5.0	327	20.21
ANWARGALV	213.3	194.7	2.0	95	20.13
RENATA	1,215.0	1,142.0	3.0	12	13.95
ADNTEL	127.5	125.5	2.0	102	12.98

\* 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	278.5	254.6	47.0	174	7
BSC	148.0	139.0	45.8	329	3
SONALIPAPR	715.0	676.0	43.0	61	4
SQURPHARMA	209.0	198.0	37.4	187	42
METROSPIN	44.0	38.0	28.4	697	2
IPDC	57.5	51.9	27.0	476	6
SALVOCHEM	61.9	61.8	20.2	327	5
ANWARGALV	213.3	194.7	20.1	95	2
RENATA	1,215.0	1,142.0	14.0	12	3
ADNTEL	127.5	125.5	13.0	102	2
BEXGSUKUK	82.7	82.0	12.8	156	4
GP	266.0	261.8	11.2	43	16
BATBC	515.0	515.0	8.8	17	4
MARICO	2,400.0	2,301.0	7.2	3	8
ACFL	26.4	26.4	7.2	274	1
RDFOOD	33.0	32.6	7.2	220	5
NBL	8.3	8.2	6.3	763	2
BXPHERMA	139.0	137.3	4.5	32	6
AL-HAJTEX	148.0	147.5	4.4	30	2
BEACHHATCH	37.7	37.7	4.2	113	2
ROBI	27.0	27.0	3.7	139	5
IFIC	10.5	10.4	3.6	350	7
<b>Total</b>			<b>415.1</b>		<b>180</b>

**Important DSE News**
**RECKITT BEN**

The Board of Directors has recommended 980% Final Cash Dividend for the year ended December 31, 2022. Date of AGM: 30.03.2023, Time: 2:30 PM. Venue: Digital Platform. Record date: 13.03.2023. The Company has also reported EPS of Tk. 139.50, NAV per share of Tk. 176.80 and NOCFPS of Tk. 271.66 for the year ended December 31, 2022 as against Tk. 171.03, Tk. 200.65 and Tk. 134.90 respectively for the same period of the previous year.

**ROBI**

The Board of Directors has recommended 7% Cash Dividend for the year ended December 31, 2022. Date of AGM: 25.04.2023, Time: 3:00 PM, Venue: Digital Platform. Record date: 13.03.2023. The Company has also reported consolidated EPS of Tk. 0.35, consolidated NAV per share of Tk. 12.82 and consolidated NOCFPS of Tk. 7.12 for the year ended December 31, 2022 as against Tk. 0.34, Tk. 12.64 and Tk. 6.22 respectively for the same period of the previous year.

**CONFIDCEM**

**(Q2 Un-audited):** Consolidated EPS was Tk. 2.74 for October-December 2022 as against Tk. 3.42 for October-December 2021; Consolidated EPS was Tk. 4.43 for July-December 2022 as against Tk. 5.74 for July-December 2021. Consolidated NOCFPS was Tk. (4.98) for July-December 2022 as against Tk. (5.25) for July-December 2021. Consolidated NAV per share was Tk. 76.22 as on December 31, 2022 and Tk. 72.24 as on June 30, 2022.

In order to meet ongoing financial requirements and equity injection to the associate companies, the Board has considered and approved the proposal for issuance of Convertible Preference Shares up to BDT 1.5 Bn only, subject to approval of Shareholders in the ensuing 5th EGM and regulatory authorities. The Board has also proposed to increase the Authorized Capital of the Company from the existing BDT 1.0 Bn to BDT 3.5 Bn along with the inclusion of Preference Share as the capital item to be divided into 200,000,000 ordinary shares of Tk. 10.00 each amounting to BDT 2,000,000,000.00 and 150,000,000 preference shares of Tk. 10.00 each amounting to BDT 1,500,000,000.00 subject to approval of the shareholders at the ensuing 5th EGM. Date of EGM: 04.04.2023, Time: 11:00 AM, Venue: Digital Platform, Record date: 13.03.2023

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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	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
RECKITT BEN		0.0%	980%	Record Date	13-Mar-23
ROBI		0.0%	7.0%	Record Date	13-Mar-23

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