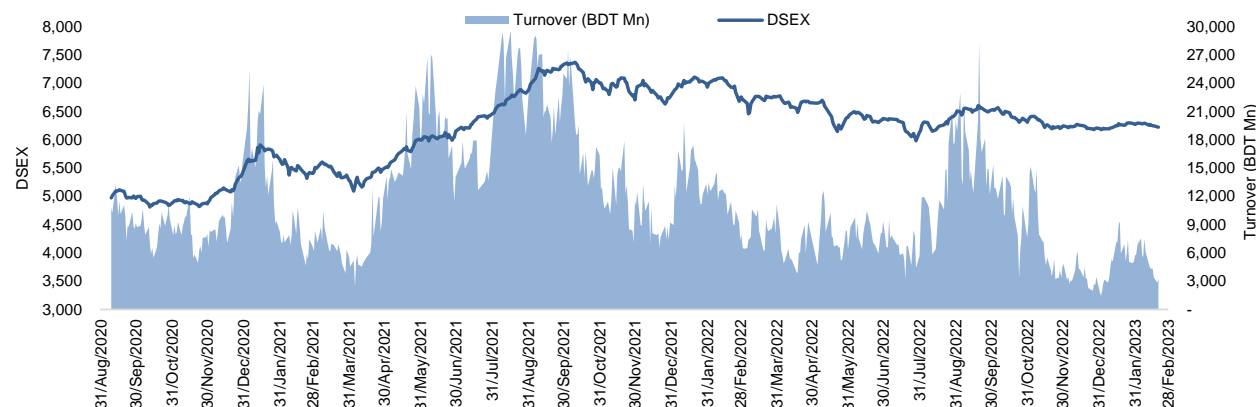


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.15%) lost 9.1 points and closed at 6,218.84. The blue-chip index DS30 (+0.01%), the Shariah-based index DSES (-0.17%), and the large-cap index CDSET (+0.03%) closed at 2,221.76, 1,359.88, and 1,221.46 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.11% followed by Fuel & Power (-0.04%), Engineering (-0.03%), NBF1 (-0.01%), Bank (-0.01%), Telecommunication (0.00%), and Food & Allied (+0.13%), respectively. Block trades contributed 13.5% of the overall market turnover. Genex Infosys Limited (-4.1%) was the most traded share with a turnover of BDT 381 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,218.84	6,227.94	-9.10	-0.15%	+0.2%
DS30	2,221.76	2,221.51	+0.25	+0.01%	+1.2%
DSES	1,359.88	1,362.19	-2.32	-0.17%	+0.1%
CDSET	1,221.46	1,221.14	+0.32	+0.03%	+0.6%

	Advanced	Declined	Unchanged	Total
All Category	19	144	141	304
A Category (Equity)	13	86	111	210
B Category (Equity)	5	45	25	75
N Category (Equity)	0	3	2	5
Z Category (Equity)	1	10	3	14
Mutual Funds	1	2	17	20
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,629,073	7,631,167	-0.0%
	Mn USD	71,400	71,419	-0.0%
Turnover	Mn BDT	3,267	2,852	+14.6%
	Mn USD	31	27	+14.6%
Volume	Mn Shares	43	37	+14.7%
	No. of Trade	63,397	62,627	+1.2%

\* Average Interbank Exchange Rate is BDT 106.85 as of Feb 19, 2023

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Figure: Sectorial Turnover (BDT Mn)

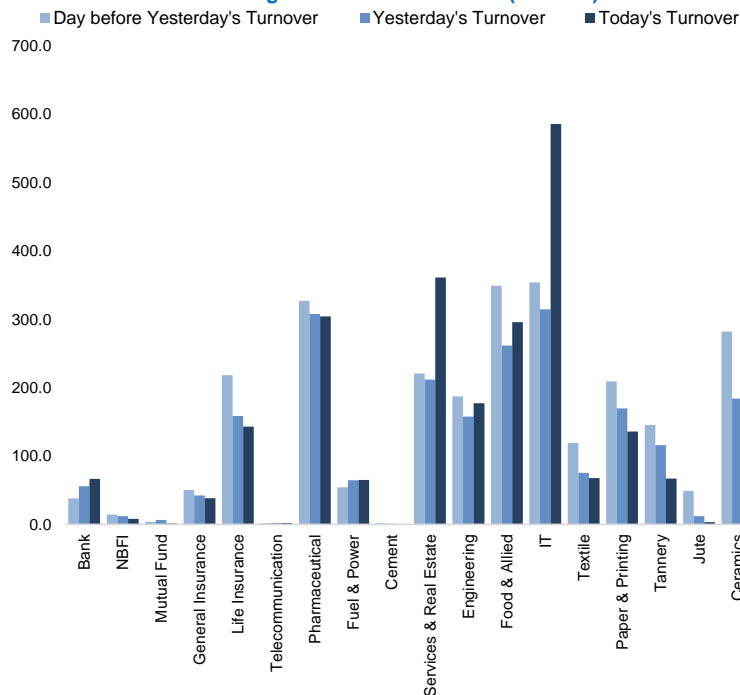
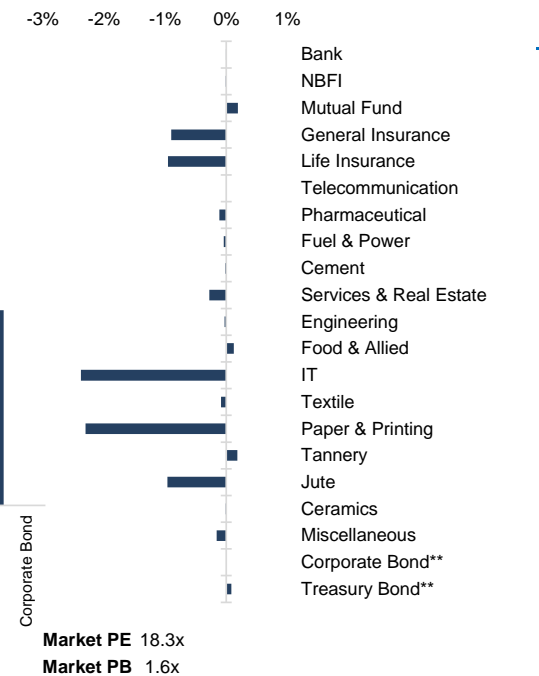


Figure: Sectorial Mcap Change



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	1,433	-0.09	-0.01%	34	669,268	8.9%	66.5	2.4%	7.8x	0.7x	GP	386,996	8.6%	1.2	12.9x	8.4x
NBFI	1,924	1,924	-0.15	-0.01%	23	187,694	2.5%	7.9	0.3%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	830	828	+1.58	+0.19%	37	37,534	0.5%	1.3	0.0%	NM	0.7x	BATBC	280,098	6.3%	0.4	15.7x	6.8x
General Insurance	3,098	3,127	-28.19	-0.90%	42	90,430	1.2%	38.5	1.4%	15.1x	1.5x	SQURPHARM	185,977	4.2%	3.6	9.7x	1.8x
Life Insurance	2,510	2,534	-24.16	-0.95%	14	70,378	0.9%	143.2	5.1%	NM	NM	ROBI	157,138	3.5%	0.1	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	2.0	0.1%	16.8x	4.7x	RENATA	139,689	3.1%	0.0	31.1x	4.7x
Pharmaceutical	3,741	3,745	-4.23	-0.11%	34	725,677	9.6%	304.1	10.8%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,689	1,690	-0.72	-0.04%	23	445,544	5.9%	65.0	2.3%	17.7x	1.1x	BEXIMCO	103,571	2.3%	0.1	9.0x	1.2x
Cement	2,311	2,311	-0.45	-0.02%	7	110,983	1.5%	0.6	0.0%	66.6x	2.5x	BERGERPBL	80,155	1.8%	0.3	27.1x	6.7x
Services & Real Esta	2,128	2,134	-5.94	-0.28%	8	84,090	1.1%	361.1	12.8%	35.7x	1.1x	MARICO	76,277	1.7%	0.4	20.7x	28.6x
Engineering	4,487	4,488	-1.29	-0.03%	42	526,645	7.0%	177.4	6.3%	53.9x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,381	21,354	+26.87	+0.13%	21	380,974	5.0%	295.9	10.5%	19.8x	7.6x	BEACONPHAR	70,340	1.6%	55.2	75.0x	11.4x
IT	3,089	3,164	-75.26	-2.38%	11	40,272	0.5%	585.5	20.7%	29.3x	2.8x	BXPHARMA	65,222	1.5%	0.5	14.1x	1.6x
Textile	1,579	1,580	-1.35	-0.09%	58	166,364	2.2%	67.8	2.4%	42.7x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,268	10,510	-241.65	-2.30%	6	39,562	0.5%	135.7	4.8%	39.0x	2.0x	ISLAMIBANK	53,452	1.2%	4.0	10.9x	0.8x
Tannery	3,062	3,057	+5.49	+0.18%	6	32,340	0.4%	67.0	2.4%	46.8x	3.1x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	13,356	13,485	-129.82	-0.96%	3	3,267	0.0%	3.3	0.1%	NM	5.2x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	694	694	-0.07	-0.01%	5	32,112	0.4%	218.1	7.7%	41.6x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,098	4,104	-6.38	-0.16%	14	223,110	3.0%	285.4	10.1%	13.2x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.7x	0.9x
Corporate Bond**	88	88	-	-	9	36,415	0.5%	0.1	0.0%	NM	NM	BSCCL	36,098	0.8%	0.7	14.3x	2.9x
Treasury Bond**	96	96	+0.08	+0.09%	252	3,068,794	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	
GLDNJMF	9.0	+9.8%	1.1	NM	0.9x	SQURPHARMA	121,685	7.2%	9.7x	1.8x	GENEXIL	91.8	-4.1%	381.2	27.8x	5.0x
EMERALDOIL	32.5	+4.8%	19.3	NM	2.1x	BATBC	74,086	4.4%	15.7x	6.8x	BSC	133.8	-0.9%	280.7	9.3x	1.7x
BDLAMPS	260.4	+2.4%	39.0	34.9x	2.9x	BEXIMCO	71,930	4.3%	9.0x	1.2x	SEAPEARL	279.7	+0.2%	234.4	67.9x	19.7x
ANLIMAYARN	31.8	+1.9%	0.9	NM	3.1x	RENATA	68,196	4.0%	31.1x	4.7x	SPCERAMICS	43.7	+0.2%	167.2	80.9x	1.4x
OLYMPIC	146.2	+1.9%	160.3	19.0x	3.1x	BEACONPHAR	49,238	2.9%	75.0x	11.4x	OLYMPIC	146.2	+1.9%	160.3	19.0x	3.1x
AL-HAJTEX	155.6	+1.4%	43.7	NM	16.4x	BXPHARMA	45,538	2.7%	14.1x	1.6x	GEMINISEA	426.2	-2.6%	95.2	30.4x	24.8x
ONEBANKLTD	11.5	+0.9%	6.9	27.2x	1x	GP	38,700	2.3%	12.9x	8.4x	AAMRANET	60.5	-1.6%	94.4	19.0x	1.6x
BATASHOE	940.5	+0.6%	0.3	36.3x	3.5x	BRACBANK	30,976	1.8%	10.9x	1.0x	ORIONPHARM	82.1	+0.4%	90.0	23.4x	0.9x
ORIONPHARM	82.1	+0.4%	90.0	23.4x	0.9x	LHBL	26,581	1.6%	18.4x	4.1x	MONNOAGML	1,053.0	-1.0%	84.9	NM	6.0x
AAMRATECH	34.0	+0.3%	9.9	30.2x	1.5x	ISLAMIBANK	24,010	1.4%	10.9x	0.8x	BPML	77.1	-0.8%	65.6	21.2x	1.0x

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)
BGIC	54.4	-9.8%	2.2	34.0x	2.7x	RUPALILIFE	88.5	88.5	3.0	750	66.38
PRAGATILIF	107.2	-7.4%	33.0	NM	NM	BSC	141.0	136.8	3.0	345	47.36
GENEXIL	91.8	-4.1%	381.2	27.8x	5.0x	GP	268.0	261.6	51.0	163	43.04
ITC	34.0	-3.7%	30.7	16.0x	1.9x	SEAPEARL	278.1	254.7	12.0	155	41.37
METROSPIN	36.8	-3.7%	19.2	37.6x	1.8x	AL-HAJTEX	153.9	148.0	10.0	231	34.82
SONALIPAPR	615.1	-3.6%	42.3	65.8x	3.6x	ANWARGALV	231.9	196.0	3.0	149	34.38
NAVANAPHAR	69.3	-3.5%	29.6	17.6x	1.8x	SQURPHARMA	201.8	199.2	17.0	125	24.95
ADNTEL	116.9	-3.4%	57.0	34.7x	4.1x	BSCCL	199.8	199.8	1.0	103	20.58
POPULARLIF	66.1	-3.2%	7.4	NM	NM	SALVOCHEM	64.5	60.0	3.0	193	12.17
GEMINISEA	426.2	-2.6%	95.2	30.4x	24.8x	MERCANBANK	14.9	14.9	1.0	660	9.84

\* 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	Important DSE News
RUPALILIFE	88.5	88.5	66.4	750	3	<b>JHRML</b> The Company will be placed in 'A' category from existing 'N' category with effect from February 22, 2023 as the Company has reported disbursement of 12.50% cash dividend for the year ended June 30, 2022.
BSC	141.0	136.8	47.4	345	3	
GP	268.0	261.6	43.0	163	51	
SEAPEARL	278.1	254.7	41.4	155	12	
AL-HAJTEX	153.9	148.0	34.8	231	10	
ANWARGALV	231.9	196.0	34.4	149	3	
SQURPHARMA	201.8	199.2	24.9	125	17	
BSCCL	199.8	199.8	20.6	103	1	
SALVOCHEM	64.5	60.0	12.2	193	3	
MERCANBANK	14.9	14.9	9.8	660	1	
NRBCBANK	19.3	19.3	9.7	500	1	
JAMUNABANK	23.5	23.5	8.1	345	1	
SSSTEEL	16.0	16.0	7.8	490	1	
SAPORTL	32.8	32.8	6.6	200	1	
RDFOOD	33.4	32.9	6.1	183	10	
PTL	69.3	69.3	4.9	71	7	
BAYLEASING	26.2	26.2	4.6	175	1	
LHBL	63.5	62.9	4.5	71	6	
MARICO	2,301.1	2,300.5	4.3	2	5	
BEXIMCO	104.3	104.3	4.2	40	1	
CNATEX	10.1	10.1	4.0	400	3	
KDSALTD	84.5	76.0	2.9	38	2	
<b>Total</b>			<b>440.7</b>		<b>185</b>	

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
RECKITBEN		2.0%	980%	Record Date	13-Mar-23
ROBI		2.0%	7.0%	Record Date	13-Mar-23

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