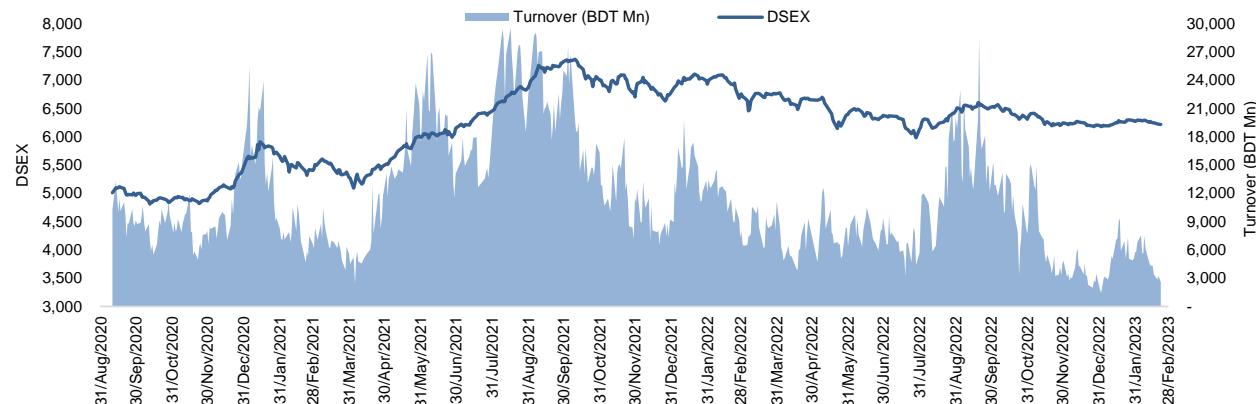


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.01%) lost 0.54 points and closed at 6,218.30. The blue-chip index DS30 (0.00%), the Shariah-based index DSES (-0.05%), and the large-cap index CDSET (-0.06%) closed at 2,221.72, 1,359.24, and 1,220.73 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.09% followed by Engineering (-0.04%), Pharmaceutical (-0.03%), Bank (-0.02%), NBFi (-0.01%), Telecommunication (0.00%), and Fuel & Power (+0.06%), respectively. Block trades contributed 24.5% of the overall market turnover. Shinepukur Ceramics Limited (+3.4%) was the most traded share with a turnover of BDT 158 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,218.30	6,218.84	-0.54	-0.01%	+0.2%
DS30	2,221.72	2,221.76	-0.04	-0.00%	+1.2%
DSES	1,359.24	1,359.88	-0.64	-0.05%	+0.0%
CDSET	1,220.73	1,221.46	-0.73	-0.06%	+0.5%

	Advanced	Declined	Unchanged	Total
All Category	37	125	153	315
A Category (Equity)	28	69	120	217
B Category (Equity)	8	45	27	80
N Category (Equity)	1	1	2	4
Z Category (Equity)	0	10	4	14
Mutual Funds	0	2	20	22
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,629,083	7,629,073	+0.0%
	Mn USD	72,603	72,603	
Turnover	Mn BDT	2,576	3,267	-21.1%
	Mn USD	25	31	
Volume	Mn Shares	39	43	-8.4%
	No. of Trade	52,088	63,397	-17.8%

\* Average Interbank Exchange Rate is BDT 105.08 as of Feb 20, 2023

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Figure: Sectorial Turnover (BDT Mn)

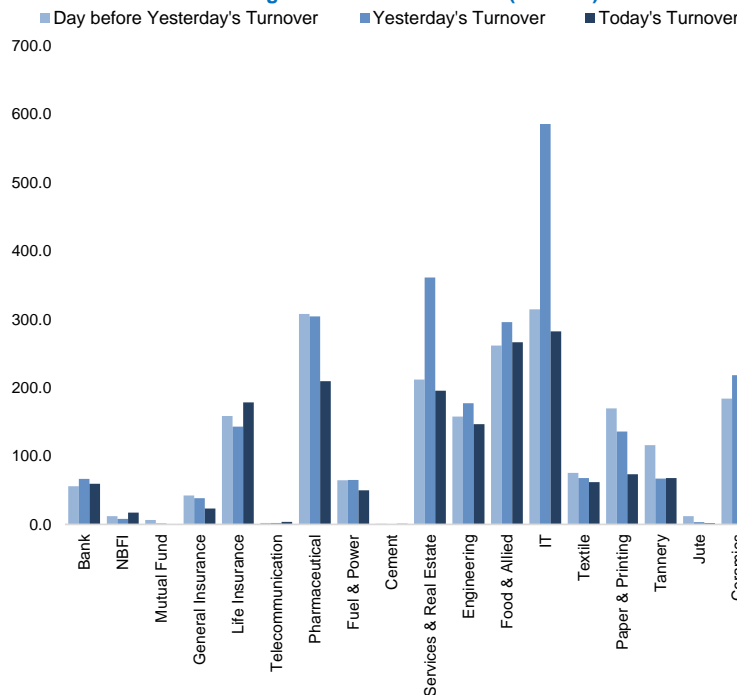
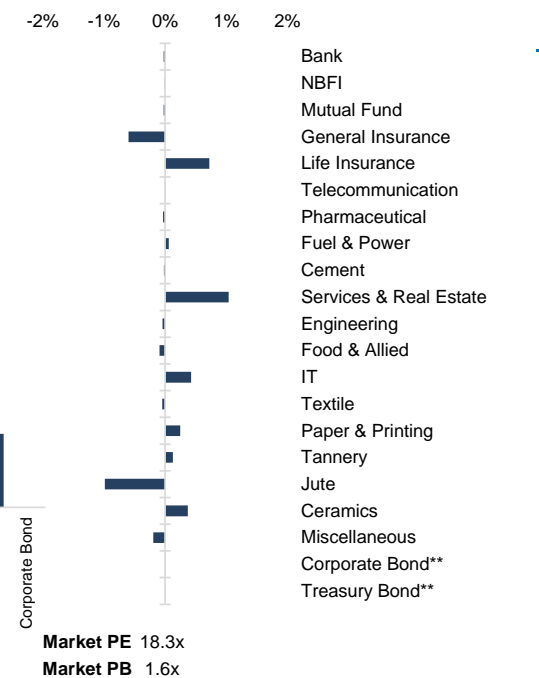


Figure: Sectorial Mcap Change



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	1,432	1,433	-0.35	-0.02%	34	669,103	8.9%	59.4	3.1%	7.8x	0.7x	GP	386,996	8.6%	3.5	12.9x	8.4x
NBFI	1,924	1,924	-0.15	-0.01%	23	187,679	2.5%	17.1	0.9%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	830	830	-0.19	-0.02%	37	37,525	0.5%	0.2	0.0%	NM	0.7x	BATBC	280,098	6.3%	0.3	15.7x	6.8x
General Insurance	3,080	3,098	-18.58	-0.60%	42	89,888	1.2%	23.1	1.2%	15.0x	1.5x	SQURPHARMA	185,977	4.2%	3.2	9.7x	1.8x
Life Insurance	2,528	2,510	+18.21	+0.73%	14	70,889	0.9%	178.5	9.2%	NM	NM	ROBI	157,138	3.5%	0.2	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	3.7	0.2%	16.8x	4.7x	RENATA	139,689	3.1%	0.1	31.1x	4.7x
Pharmaceutical	3,740	3,741	-1.30	-0.03%	34	725,426	9.6%	209.6	10.8%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,690	1,689	+1.03	+0.06%	23	445,817	5.9%	49.8	2.6%	17.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	9.0x	1.2x
Cement	2,310	2,311	-0.45	-0.02%	7	110,961	1.5%	0.9	0.0%	70.8x	2.5x	BERGERPBL	79,770	1.8%	0.2	27.0x	6.6x
Services & Real Esta	2,151	2,128	+22.11	+1.04%	8	84,963	1.1%	195.7	10.1%	36.1x	1.1x	MARICO	76,277	1.7%	0.0	20.7x	28.6x
Engineering	4,485	4,487	-1.96	-0.04%	42	526,414	7.0%	146.8	7.5%	53.9x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,361	21,381	-19.31	-0.09%	21	380,630	5.0%	266.4	13.7%	19.8x	7.6x	BEACONPHAR	69,970	1.6%	30.3	74.6x	11.3x
IT	3,102	3,089	+13.18	+0.43%	11	40,443	0.5%	282.4	14.5%	29.5x	2.8x	BXPHERMA	65,222	1.5%	0.6	14.1x	1.6x
Textile	1,578	1,579	-0.76	-0.05%	58	166,284	2.2%	61.6	3.2%	42.7x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	10,293	10,268	+25.35	+0.25%	6	39,660	0.5%	73.5	3.8%	39.1x	2.0x	ISLAMIBANK	53,613	1.2%	3.9	10.9x	0.8x
Tannery	3,066	3,062	+3.95	+0.13%	6	32,381	0.4%	67.7	3.5%	46.9x	3.1x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	13,224	13,356	-131.57	-0.99%	3	3,235	0.0%	1.8	0.1%	NM	5.1x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	697	694	+2.57	+0.37%	5	32,231	0.4%	198.7	10.2%	41.7x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,090	4,098	-7.95	-0.19%	14	222,677	2.9%	107.8	5.5%	13.2x	1.8x	SUMITPOWER	36,308	0.8%	0.6	10.7x	0.9x
Corporate Bond**	88	88	-	-	9	36,415	0.5%	0.0	0.0%	NM	NM	BSCCL	36,098	0.8%	0.0	14.3x	2.9x
Treasury Bond**	96	96	+0.00	+0.00%	252	3,068,858	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	
RUPALILIFE	92.5	+5.8%	75.8	NM	NM	SQURPHARMA	121,685	7.2%	9.7x	1.8x	SPCERAMICS	45.2	+3.4%	157.7	83.7x	1.4x
POPULARLIF	68.4	+3.5%	3.8	NM	NM	BATBC	74,086	4.4%	15.7x	6.8x	BSC	134.0	+0.1%	104.8	9.3x	1.8x
SPCERAMICS	45.2	+3.4%	157.7	83.7x	1.4x	BEXIMCO	71,930	4.3%	9.0x	1.2x	GENEXIL	92.7	+1.0%	99.3	28.0x	5.0x
PRAGATILIF	110.7	+3.3%	30.6	NM	NM	RENATA	68,196	4.0%	31.1x	4.7x	OLYMPIC	144.5	-1.2%	96.6	18.8x	3.0x
GEMINISEA	439.4	+3.1%	80.4	31.3x	25.6x	BEACONPHAR	48,979	2.9%	74.6x	11.3x	SEAPEARL	285.1	+1.9%	81.5	69.2x	20.1x
INTRACO	30.3	+3.1%	40.1	20.0x	2.4x	BXPHERMA	45,538	2.7%	14.1x	1.6x	GEMINISEA	439.4	+3.1%	80.4	31.3x	25.6x
SONALILIFE	62.9	+2.3%	8.9	NM	NM	GP	38,700	2.3%	12.9x	8.4x	AAMRANET	60.9	+0.7%	76.8	19.1x	1.6x
MEGHNALIFE	83.6	+2.1%	43.4	NM	NM	BRACBANK	30,976	1.8%	10.9x	1.0x	RUPALILIFE	92.5	+5.8%	75.8	NM	NM
NAVANAPHAR	70.7	+2.0%	13.6	17.9x	1.8x	LHBL	26,581	1.6%	18.4x	4.1x	ORIONPHARM	81.9	-0.2%	68.2	23.3x	0.9x
SEAPEARL	285.1	+1.9%	81.5	69.2x	20.1x	ISLAMIBANK	24,083	1.4%	10.9x	0.8x	APEXFOOT	291.9	-2.6%	66.5	23.5x	1.3x
						NBL	19,116	1.1%	NM	0.6x						

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	50.4	-7.4%	0.1	31.5x	2.5x	SQURPHARMA	201.0	198.0	22.0	821	162.85
BDLAMPS	252.8	-2.9%	42.3	33.8x	3x	DHAKAINS	66.0	60.0	2.0	990	62.53
APEXFOOT	291.9	-2.6%	66.5	23.5x	1.3x	BEACONPHAR	325.0	278.1	2.0	169	49.86
MONNOCERA	109.6	-2.2%	40.6	NM	1.3x	SEAPEARL	280.0	255.4	11.0	164	43.36
ITC	33.6	-1.2%	34.8	15.8x	1.9x	RUPALILIFE	89.0	89.0	2.0	450	40.05
OLYMPIC	144.5	-1.2%	96.6	18.8x	3.0x	SUNLIFEINS	60.6	58.0	4.0	526	31.81
PRIMETEX	29.7	-1.0%	0.0	NM	0.4x	SALVOCHEM	61.6	61.6	1.0	480	29.57
HAKKANIPUL	49.5	-1.0%	0.5	NM	2.2x	RENATA	1,217.9	1,150.0	2.0	19	23.12
SAFKOSPINN	19.8	-1.0%	0.0	NM	1.0x	METROSPIN	40.1	33.2	6.0	546	19.52
ARAMIT	267.5	-1.0%	0.8	36.3x	1.7x	IFIC	12.6	12.6	1.0	1,305	16.45

\* 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
SQURPHARMA	201.0	198.0	162.8	821	22
DHAKAINS	66.0	60.0	62.5	990	2
BEACONPHAR	325.0	278.1	49.9	169	2
SEAPEARL	280.0	255.4	43.4	164	11
RUPALILIFE	89.0	89.0	40.1	450	2
SUNLIFEINS	60.6	58.0	31.8	526	4
SALVOCHEM	61.6	61.6	29.6	480	1
RENATA	1,217.9	1,150.0	23.1	19	2
METROSPIN	40.1	33.2	19.5	546	6
IFIC	12.6	12.6	16.4	1,305	1
BSC	136.6	136.6	13.7	100	1
RELIANCINS	58.0	58.0	12.0	206	1
BSRMSTEEL	61.5	61.0	11.1	180	5
AL-HAJTEX	160.0	145.1	10.0	66	7
DELTALIFE	150.0	132.2	8.7	60	4
BRACBANK	34.7	34.7	8.3	238	2
GP	268.4	261.6	6.1	23	10
MAKSONSPIN	24.5	24.5	6.1	250	1
RDFOOD	39.8	32.7	5.7	165	8
LHBL	70.0	62.9	5.5	86	5
BSRMLTD	87.5	87.5	4.4	50	1
AOL	36.5	35.7	4.3	119	2
<b>Total</b>			<b>631.6</b>		<b>155</b>

**Important DSE News**

**SSSTEEL**

Refer to their earlier news disseminated by DSE on 01.02.2023 regarding dividend declaration and approval of fund for business expansion, the company has further informed that they have not received any consent yet regarding their declaration of 8% Stock dividend for the year ended June 30, 2022.

**ARAMIT**

**(Q2 Un-audited):** EPS was Tk. 1.10 for October-December 2022 as against Tk. 1.98 for October-December 2021; EPS was Tk. 2.23 for July-December 2022 as against Tk. 3.12 for July-December 2021. NOCFPS was Tk. (0.22) for July-December 2022 as against Tk. (8.92) for July-December 2021. NAV per share was Tk. 153.60 as on December 31, 2022 and Tk. 152.28 as on June 30, 2022.

**ARAMITCEM**

**(Q2 Un-audited):** EPS was Tk. (5.05) for October-December 2022 as against Tk. (2.15) for October-December 2021; EPS was Tk. (7.69) for July-December 2022 as against Tk. (4.11) for July-December 2021. NOCFPS was Tk. 3.57 for July-December 2022 as against Tk. (0.15) for July-December 2021. NAV per share was Tk. 4.93 as on December 31, 2022 and Tk. 12.58 as on June 30, 2022.

**Upcoming Corporate Events**

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

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