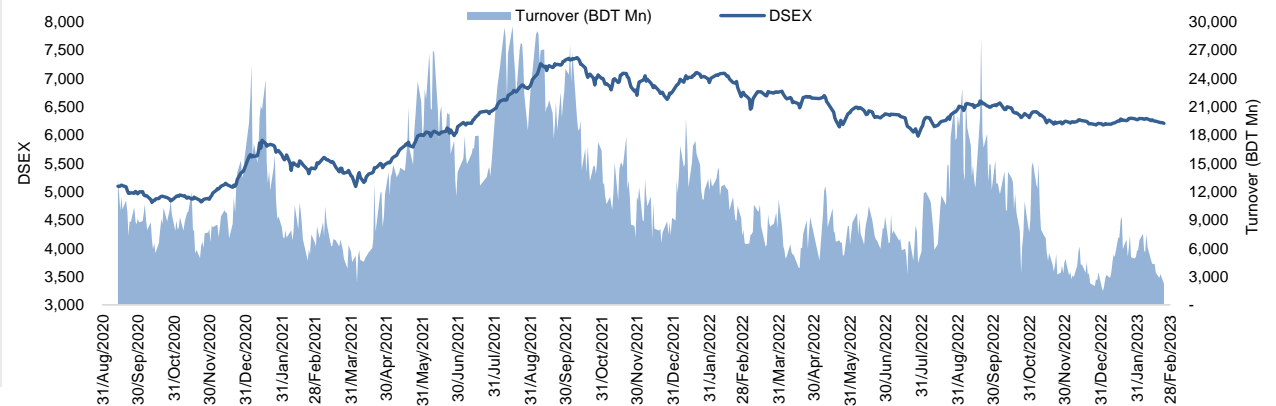


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.21%) lost 13.18 points and closed at 6,205.12. The blue-chip index DS30 (-0.02%), the Shariah-based index DSES (-0.25%), and the large-cap index CDSET (-0.01%) closed at 2,221.34, 1,355.86, and 1,220.58 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.01% followed by Bank (+0.01%), Telecommunication (0.00%). Pharmaceutical experienced the highest loss of 0.22% followed by Engineering (-0.05%), Fuel & Power (-0.05%), NBFI (-0.01%). Block trades contributed 14.7% of the overall market turnover. Bangladesh Shipping Corporation (-1.2%) was the most traded share with a turnover of BDT 291 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,205.12	6,218.30	-13.18	-0.21%	-0.0%
DS30	2,221.34	2,221.72	-0.38	-0.02%	+1.2%
DSES	1,355.86	1,359.24	-3.38	-0.25%	-0.2%
CDSET	1,220.58	1,220.73	-0.15	-0.01%	+0.5%

	Advanced	Declined	Unchanged	Total
All Category	9	152	154	315
A Category (Equity)	7	89	121	217
B Category (Equity)	2	50	29	81
N Category (Equity)	0	2	2	4
Z Category (Equity)	0	11	2	13
Mutual Funds	0	2	25	27
Corporate Bonds	0	2	1	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,622,270	7,629,083	-0.1%
	Mn USD	72,082	72,146	
Turnover	Mn BDT	2,230	2,576	-13.4%
	Mn USD	21	24	
Volume	Mn Shares	32	39	-19.0%
	No. of Trade	47,010	52,088	-9.7%

* Average Interbank Exchange Rate is BDT 105.75 as of Feb 22, 2023

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Figure: Sectorial Turnover (BDT Mn)

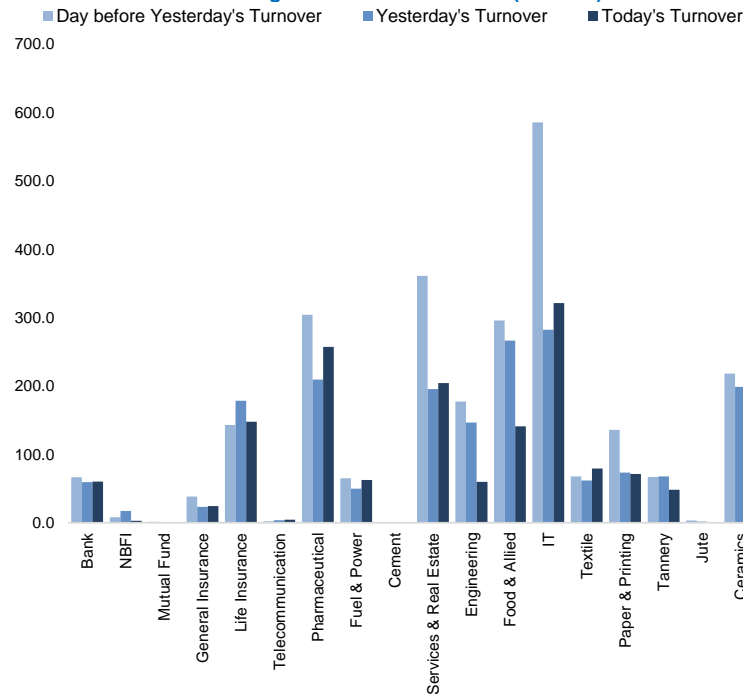
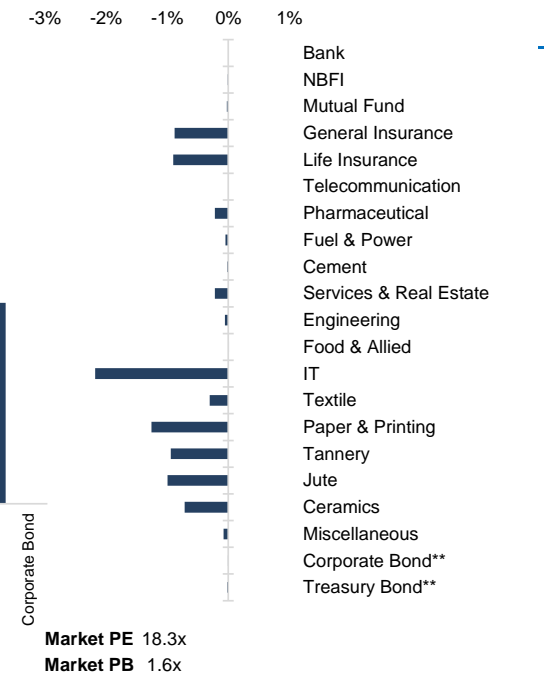


Figure: Sectorial Mcap Change



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	1,432	+0.13	+0.01%	34	669,166	8.9%	60.3	3.2%	7.8x	0.7x	GP	386,996	8.7%	4.2	12.9x	8.4x
NBFI	1,924	1,924	-0.15	-0.01%	23	187,665	2.5%	3.0	0.2%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	830	830	-0.19	-0.02%	37	37,516	0.5%	0.5	0.0%	NM	0.7x	BATBC	280,098	6.3%	0.9	15.7x	6.8x
General Insurance	3,053	3,080	-27.02	-0.88%	42	89,099	1.2%	24.5	1.3%	14.9x	1.4x	SQURPHARMA	185,977	4.2%	1.1	9.7x	1.8x
Life Insurance	2,505	2,528	-22.78	-0.90%	14	70,250	0.9%	147.8	7.8%	NM	NM	ROBI	157,138	3.5%	0.1	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	4.3	0.2%	16.8x	4.7x	RENATA	139,689	3.1%	0.0	31.1x	4.7x
Pharmaceutical	3,732	3,740	-8.13	-0.22%	34	723,849	9.6%	257.1	13.5%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,689	1,690	-0.77	-0.05%	23	445,613	5.9%	62.6	3.3%	17.7x	1.1x	BEXIMCO	103,571	2.3%	0.1	9.0x	1.2x
Cement	2,310	2,310	-0.45	-0.02%	7	110,939	1.5%	0.7	0.0%	70.8x	2.5x	BERGERPBL	79,923	1.8%	1.0	27.1x	6.7x
Services & Real Esta	2,146	2,151	-4.68	-0.22%	8	84,779	1.1%	204.4	10.7%	36.0x	1.1x	MARICO	76,277	1.7%	0.6	20.7x	28.6x
Engineering	4,483	4,485	-2.43	-0.05%	42	526,128	7.0%	59.7	3.1%	53.9x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,364	21,361	+2.58	+0.01%	21	380,676	5.0%	141.1	7.4%	19.8x	7.6x	BEACONPHAR	69,808	1.6%	43.7	74.4x	11.3x
IT	3,035	3,102	-67.44	-2.17%	11	39,564	0.5%	321.3	16.9%	28.8x	2.7x	BXPHERMA	65,222	1.5%	0.9	14.1x	1.6x
Textile	1,573	1,578	-4.82	-0.31%	58	165,776	2.2%	79.3	4.2%	42.5x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,164	10,293	-129.10	-1.25%	6	39,162	0.5%	71.3	3.7%	38.7x	2.0x	ISLAMIBANK	53,774	1.2%	11.5	11.0x	0.8x
Tannery	3,037	3,066	-28.75	-0.94%	6	32,078	0.4%	48.1	2.5%	46.4x	3.1x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	13,093	13,224	-131.57	-0.99%	3	3,203	0.0%	0.5	0.0%	NM	5.1x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	692	697	-4.98	-0.71%	5	32,001	0.4%	121.4	6.4%	41.4x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,087	4,090	-3.09	-0.08%	14	222,509	2.9%	293.9	15.5%	13.2x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.7x	0.9x
Corporate Bond**	88	88	-0.00	-0.00%	9	36,415	0.5%	0.2	0.0%	NM	NM	BSCCL	36,098	0.8%	0.0	14.3x	2.9x
Treasury Bond**	96	96	-0.02	-0.02%	252	3,068,292	40.7%	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	
ISLAMIINS	39.6	+1.0%	0.3	12.8x	2.2x	SQURPHARMA	121,685	7.2%	9.7x	1.8x	BSC	132.4	-1.2%	291.3	9.2x	1.7x
SEAPEARL	287.8	+0.9%	116.6	69.9x	20.3x	BATBC	74,086	4.4%	15.7x	6.8x	GENEXIL	88.6	-4.4%	168.6	26.8x	4.8x
OLYMPIC	145.7	+0.8%	58.0	18.9x	3.1x	BEXIMCO	71,930	4.3%	9.0x	1.2x	SEAPEARL	287.8	+0.9%	116.6	69.9x	20.3x
ISLAMIBANK	33.4	+0.3%	11.5	11.0x	0.8x	RENATA	68,196	4.1%	31.1x	4.7x	SPCERAMICS	44.4	-1.8%	86.1	82.2x	1.4x
BERGERPBL	1,723.3	+0.2%	1.0	27.1x	6.7x	BEACONPHAR	48,866	2.9%	74.4x	11.3x	AAMRANET	58.9	-3.3%	84.5	18.5x	1.5x
NTC	600.3	+0.2%	2.6	NM	12.1x	BXPHERMA	45,538	2.7%	14.1x	1.6x	RUPALILIFE	89.2	-3.6%	66.7	NM	NM
BDLAMPS	252.9	+0.0%	21.5	33.9x	3x	GP	38,700	2.3%	12.9x	8.4x	ORIONPHARM	81.0	-1.1%	62.2	23.1x	0.9x
AB BANK	9.9	-	0.5	10.6x	0.3x	BRACBANK	30,976	1.8%	10.9x	1.0x	OLYMPIC	145.7	+0.8%	58.0	18.9x	3.1x
ALARABANK	23.6	-	1.0	14.6x	1.1x	LHBL	26,581	1.6%	18.4x	4.1x	GEMINISEA	424.0	-3.5%	57.2	30.2x	24.7x
BANKASIA	20.2	-	0.0	7.6x	0.8x	ISLAMIBANK	24,155	1.4%	11.0x	0.8x	AL-HAJTEX	146.3	-6.0%	57.1	NM	15.4x
						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)
METROSPIN	34.7	-7.0%	16.7	35.5x	1.7x	BXPHERMA	146.5	138.9	3.0	330	48.34
AL-HAJTEX	146.3	-6.0%	57.1	NM	15x	SEAPEARL	280.0	260.2	19.0	167	44.79
PRAGATILIF	104.6	-5.5%	25.8	NM	NM	SQURPHARMA	199.4	197.1	19.0	202	39.94
GENEXIL	88.6	-4.4%	168.6	26.8x	4.8x	ALARABANK	64.7	61.5	7.0	608	37.79
BGIC	48.3	-4.2%	0.3	30.2x	2.4x	BSRMLTD	14,417	137.0	2.0	200	27.80
RUPALILIFE	89.2	-3.6%	66.7	NM	NM	PRIMEBANK	13,807	213.3	3.0	104	22.11
GEMINISEA	424.0	-3.5%	57.2	30.2x	24.7x	UPGDCL	13,547	325.7	1.0	61	19.87
KOHINOOR	411.7	-3.5%	11.7	36.4x	7.6x			33.7	2.0	408	15.16
NAVANAPHAR	68.3	-3.4%	24.9	17.3x	1.7x			155.7	5.0	65	9.87
AAMRANET	58.9	-3.3%	84.5	18.5x	1.5x			266.9	11.0	26	6.88

* 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
BXPHARMA	146.5	138.9	48.3	330	3
SEAPEARL	280.0	260.2	44.8	167	19
SQURPHARMA	199.4	197.1	39.9	202	19
SALVOCHEM	64.7	61.5	37.8	608	7
BSC	141.0	137.0	27.8	200	2
ANWARGALV	213.3	213.3	22.1	104	3
BEACONPHAR	325.7	325.7	19.9	61	1
METROSPIN	40.7	33.7	15.2	408	2
AL-HAJTEX	155.7	150.0	9.9	65	5
GP	266.9	262.6	6.9	26	11
ACFL	26.4	26.4	5.8	219	1
PTL	75.0	69.3	5.1	69	4
BEACHHATCH	37.8	37.8	3.8	100	1
SUMITPOWER	34.2	34.2	3.4	100	1
BATBC	485.0	479.8	2.5	5	4
RDFOOD	33.5	33.1	2.4	73	4
GSPFINANCE	30.2	27.4	2.3	82	4
MARICO	2,301.0	2,300.5	2.3	1	3
BSRMSTEEL	61.5	61.5	2.2	36	3
LHBL	63.2	62.5	1.9	30	3
AAMRATECH	34.9	34.9	1.7	50	2
SONALIPAPR	580.0	570.0	1.7	3	3
Total			327.8		133

Important DSE News

ADNTEL

Mamonoor Rashid, one of the Sponsors of the company, has expressed his intention to sell 2,00,000 shares out of his holding of 17,05,000 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange (DSE) within next 30 working days.

GENNEXT

A.J. Corporation Limited, a Corporate Director of the Company, has expressed its intention to buy 5,19,000 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange within next 30 working days.

KPCL

The Company has informed that the Board of Directors of the Company has appointed Mr. Nasiruddin Akhter Rashid and Mr. Khondaker Zayed Ahsan, nominees from United Mymensingh Power Ltd. (UMPL) as Director in place of Mr. Abul Kalam Azad and Mr. Faridur Rahman Khan, effective from February 05, 2023.

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
RECKITT BEN		2.0%	980%	Record Date	13-Mar-23
ROBI		2.0%	7.0%	Record Date	13-Mar-23

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