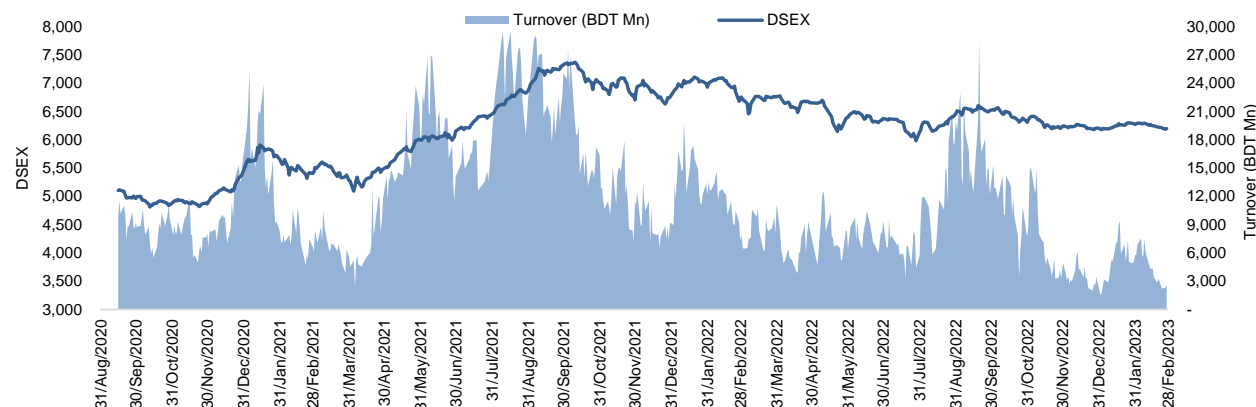


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.28%) gained 17.11 points and closed at 6,199.20. The blue-chip index DS30 (+0.18%), the Shariah-based index DSES (+0.41%), and the large-cap index CDSET (+0.09%) closed at 2,218.77, 1,356.38, and 1,220.56 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.34% followed by Food & Allied (+0.23%), Fuel & Power (+0.03%), Engineering (+0.02%), NBF1 (+0.01%), Telecommunication (0.00%), and Bank (-0.03%), respectively. Block trades contributed 12.5% of the overall market turnover. Bangladesh Shipping Corporation (+4.3%) was the most traded share with a turnover of BDT 288 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,199.20	6,182.09	+17.11	+0.28%	-0.1%
DS30	2,218.77	2,214.74	+4.03	+0.18%	+1.1%
DSES	1,356.38	1,350.79	+5.59	+0.41%	-0.2%
CDSET	1,220.56	1,219.42	+1.14	+0.09%	+0.5%

	Advanced	Declined	Unchanged	Total
All Category	56	100	159	315
A Category (Equity)	39	54	119	212
B Category (Equity)	16	35	33	84
N Category (Equity)	0	2	2	4
Z Category (Equity)	1	9	5	15
Mutual Funds	0	1	14	15
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,621,786	7,611,992	+0.1%
	Mn USD	71,232	71,140	
Turnover	Mn BDT	2,617	2,314	+13.1%
	Mn USD	24	22	
Volume	Mn Shares	34	33	+2.3%
No. of Trade	58,906	52,580	+12.0%	

\* Average Interbank Exchange Rate is BDT 107.00 as of Feb 26, 2023

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Figure: Sectorial Turnover (BDT Mn)

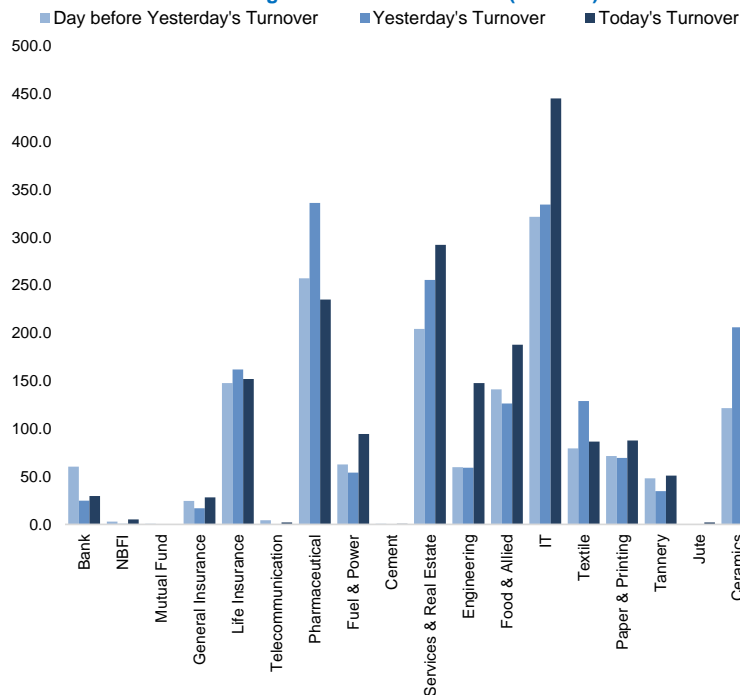
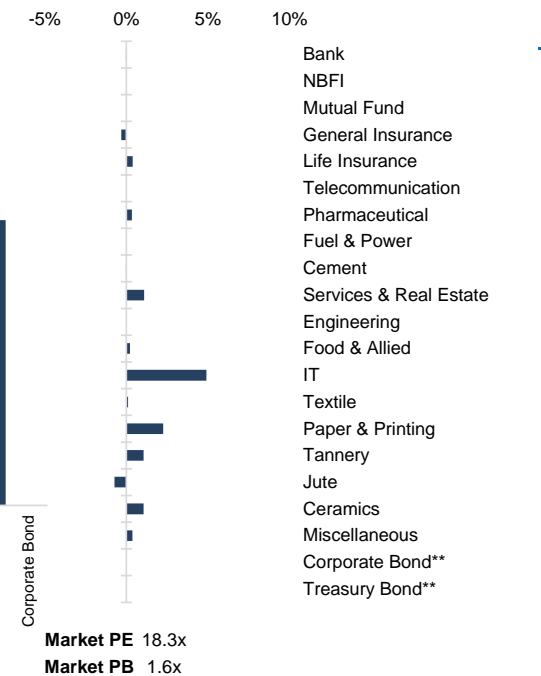


Figure: Sectorial Mcap Change



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	1,432	1,432	-0.46	-0.03%	34	668,757	8.9%	29.8	1.3%	7.8x	0.7x	GP	386,996	8.7%	1.7	12.9x	8.4x
NBFI	1,924	1,923	+0.15	+0.01%	23	187,665	2.5%	5.2	0.2%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	830	830	-0.04	-0.01%	37	37,512	0.5%	0.3	0.0%	NM	0.7x	BATBC	280,098	6.3%	1.0	15.7x	6.8x
General Insurance	3,020	3,029	-9.31	-0.31%	42	88,140	1.2%	28.1	1.2%	14.8x	1.4x	SQURPHARMA	185,977	4.2%	1.2	9.7x	1.8x
Life Insurance	2,496	2,486	+9.79	+0.39%	14	70,003	0.9%	152.0	6.6%	NM	NM	ROBI	157,138	3.5%	0.0	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%	0.1	31.1x	4.7x
Pharmaceutical	3,732	3,719	+12.78	+0.34%	34	723,937	9.6%	234.8	10.3%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,689	1,688	+0.50	+0.03%	23	445,394	5.9%	94.6	4.1%	17.7x	1.1x	BEXIMCO	103,571	2.3%	0.1	9.0x	1.2x
Cement	2,309	2,309	-0.45	-0.02%	7	110,895	1.5%	0.5	0.0%	70.8x	2.5x	BERGERPBL	79,802	1.8%	1.4	27.0x	6.6x
Services & Real Esta	2,112	2,089	+22.94	+1.10%	8	83,452	1.1%	292.0	12.7%	35.5x	1.1x	MARICO	76,277	1.7%	0.1	20.7x	28.6x
Engineering	4,482	4,481	+0.91	+0.02%	42	526,027	7.0%	147.6	6.4%	53.8x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,361	21,312	+48.65	+0.23%	21	380,622	5.0%	187.8	8.2%	19.8x	8.0x	BEACONPHAR	69,369	1.6%	40.9	74.0x	11.2x
IT	3,082	2,937	+144.44	+4.92%	11	40,175	0.5%	444.9	19.4%	29.3x	2.8x	BXPHERMA	65,222	1.5%	0.2	14.1x	1.6x
Textile	1,573	1,572	+1.68	+0.11%	58	165,806	2.2%	86.6	3.8%	42.5x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,214	9,988	+226.00	+2.26%	6	39,352	0.5%	87.8	3.8%	38.8x	2.0x	ISLAMIBANK	53,774	1.2%	3.8	11.0x	0.8x
Tannery	3,063	3,031	+32.25	+1.06%	6	32,350	0.4%	51.0	2.2%	46.8x	3.1x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	12,869	12,963	-94.51	-0.73%	3	3,148	0.0%	2.2	0.1%	NM	5.0x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	692	685	+7.21	+1.05%	5	32,027	0.4%	144.8	6.3%	41.5x	1.9x	SUMITGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,077	4,062	+15.18	+0.37%	14	221,978	2.9%	298.0	13.0%	13.1x	1.8x	POWERGRID	36,308	0.8%	0.0	10.7x	0.9x
Corporate Bond**	88	88	-	-	9	36,415	0.5%	0.0	0.0%	NM	NM	BSCCL	36,098	0.8%	0.2	14.3x	2.9x
Treasury Bond**	96	96	+0.03	+0.03%	252	3,070,442	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	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
METROSPIN	34.6	+9.8%	10.4	35.4x	1.6x	SQURPHARMA	121,685	7.2%	9.7x	1.8x	BSC	130.4	+4.3%	287.8	8.7x	1.6x
AAMRANET	59.4	+8.8%	65.9	18.6x	1.6x	BATBC	74,086	4.4%	15.7x	6.8x	GENEXIL	89.1	+8.1%	162.3	26.9x	4.8x
GEMINISEA	439.1	+8.7%	80.5	31.3x	25.6x	BEXIMCO	71,930	4.3%	9.0x	1.2x	SEAPEARL	277.3	-1.2%	149.8	67.3x	19.6x
ORIONINFU	330.1	+8.3%	66.2	NM	24.7x	RENATA	68,196	4.1%	31.1x	4.7x	ADNTEL	122.8	+8.3%	114.5	36.4x	4.3x
ADNTEL	122.8	+8.3%	114.5	36.4x	4.3x	BEACONPHAR	48,559	2.9%	74.0x	11.2x	SPCERAMICS	44.4	+2.8%	110.0	82.2x	1.4x
GENEXIL	89.1	+8.1%	162.3	26.9x	4.8x	BXPHERMA	45,538	2.7%	14.1x	1.6x	EHL	90.5	+4.7%	101.8	14.2x	1.2x
MONOSPOOL	261.5	+7.3%	19.7	35.1x	6x	GP	38,700	2.3%	12.9x	8.4x	MONNOAGML	1,030.9	+0.9%	89.2	NM	5.9x
APEXFOOT	294.2	+6.2%	49.7	23.7x	1.3x	BRACBANK	30,976	1.8%	10.9x	1.0x	GEMINISEA	439.1	+8.7%	80.5	31.3x	25.6x
BPML	76.4	+5.8%	66.6	21.0x	1.0x	LHBL	26,581	1.6%	18.4x	4.1x	INTRACO	30.3	+3.1%	77.3	20.0x	2.4x
JHRML	75.6	+5.4%	27.5	22.4x	2.4x	ISLAMIBANK	24,155	1.4%	11.0x	0.8x	AL-HAJTEX	156.3	+0.6%	67.9	NM	16.5x
						NBL	19,116	1.1%	NM	0.6x						
						PUBALIBANK	18,525	1.1%	5.5x	0.6x						
						SEAPEARL	17,803	1.1%	67.3x	19.6x						
						OLYMPIC	17,780	1.1%	19.1x	3.1x						
						CITYBANK	17,615	1.0%	4.5x	0.8x						
						ROBI	15,714	0.9%	85.7x	2.4x						
						ALARABANK	14,609	0.9%	14.6x	1.1x						
						BSRMLTD	14,417	0.9%	NM	0.7x						
						PRIMEBANK	13,807	0.8%	6.5x	0.7x						
						UPGDCL	13,547	0.8%	15.4x	4.7x						

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)
SEAPEARL	277.3	-1.2%	149.8	67.3x	19.6x	BXPHERMA	146.6	146.5	7.0	511	74.87
BDCOM	39.6	-1.0%	45.9	27.8x	3x	SEAPEARL	298.5	256.2	20.0	183	47.49
SONALIANS	427.0	-1.0%	1.9	NM	1.9x	AL-HAJTEX	155.0	150.0	18.0	239	36.39
ZEALBANGLA	119.2	-1.0%	0.0	NM	NM	ADNTEL	124.7	107.0	9.0	173	20.99
ARAMIT	259.7	-1.0%	0.6	35.3x	1.7x	BEACONPHAR	320.7	312.8	2.0	62	19.54
RAHIMTEXT	140.1	-1.0%	0.0	NM	4.2x	GP	265.0	261.6	12.0	73	19.17
DULAMIACOT	70.2	-1.0%	0.0	52.4x	NM	SALVOCHEM	63.6	60.0	7.0	230	14.21
AMCL(PRAN)	250.8	-1.0%	3.7	48.0x	2.9x	BDTHAIFOOD	35.2	35.2	7.0	340	11.97
RENWICKJA	752.4	-1.0%	0.9	NM	NM	SQURPHARMA	198.7	196.1	14.0	47	9.29
MEGHNAINS	30.1	-1.0%	0.0	85.1x	1.7x	RDFOOD	35.5	32.6	4.0	251	8.55

\* 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
BXPHERMA	146.6	146.5	74.9	511	7	<b>UNIONCAP</b> The Company has informed that the Board of Directors has elected Mr. Munshi Shafiul Haque as the Chairman of the Board of Directors of the Company.  <b>ADNTEL</b> Md. Abu Yousof Zakaria, one of the Sponsors of the company, has expressed his intention to sell the entire 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. Mohammad Ali Sarker, one of the Sponsors of the company, has expressed his intention to sell 8,52,500 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.  <b>RENATA</b> The Company has informed that the Chief Financial Officer (CFO) of the company, Mr. Khokan Chandra Das will retire on February 28, 2023. Mr. Mustafa Alim Aolad FCA (ICAEW) will join as CFO effective from March 01, 2023 which has been approved at the board meeting of the company.  <b>BDLAMPS</b> The Company has informed that the Board of Directors has appointed Mr. Md. Shahidul Islam, FCA as Chief Financial Officer of the company with effect from February 23, 2023.  <b>ACMEPL</b> The Board of Directors of the company has approved the resignation of the previous company secretary, Mr. Md. Ariful Alam and appointed Mr. Sabuj Kumar Ghosh as acting company secretary.  <b>PHENIXINS</b> The company has informed that one of the independent directors, Mr. Md. Faizur Rahman has resigned from the Board of Directors of the company.
SEAPPEARL	298.5	256.2	47.5	183	20	
AL-HAJTEX	155.0	150.0	36.4	239	18	
ADNTEL	124.7	107.0	21.0	173	9	
BEACONPHAR	320.7	312.8	19.5	62	2	
GP	265.0	261.6	19.2	73	12	
SALVOCHEM	63.6	60.0	14.2	230	7	
BDTHAIFOOD	35.2	35.2	12.0	340	7	
SQURPHARMA	198.7	196.1	9.3	47	14	
RDFOOD	35.5	32.6	8.5	251	4	
BSC	137.0	137.0	5.5	40	1	
SONALIPAPR	580.0	569.0	5.2	9	9	
MONNOAGML	1,018.0	1,018.0	5.1	5	1	
ACFL	26.1	26.1	4.5	174	1	
BATBC	518.7	479.8	4.5	9	7	
BDFINANCE	40.1	40.1	4.0	100	1	
MARICO	2,300.5	2,300.5	3.9	2	3	
NBL	8.3	8.1	3.5	423	2	
LHBL	62.6	62.2	3.4	55	6	
BRACBANK	34.8	34.8	2.2	62	2	
DELTALIFE	132.1	132.0	2.0	15	2	
LANKABAFIN	23.5	23.5	1.6	70	1	
<b>Total</b>			<b>327.2</b>		<b>163</b>	

**Upcoming Corporate Events**

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

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