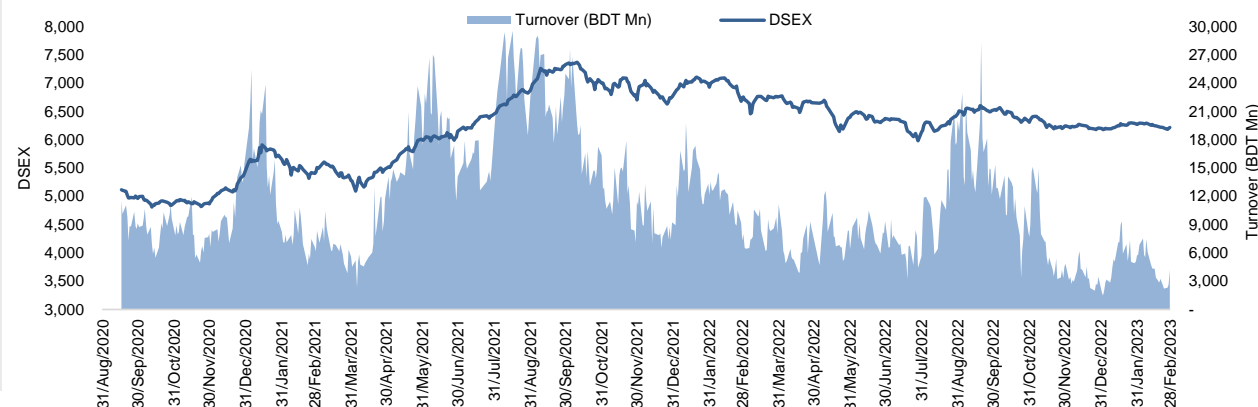


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.29%) gained 17.75 points and closed at 6,216.95. The blue-chip index DS30 (+0.10%), the Shariah-based index DSES (+0.24%), and the large-cap index CDSET (+0.02%) closed at 2,220.98, 1,359.66, and 1,220.75 points, respectively. All the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.18% followed by Pharmaceutical (+0.12%), Bank (+0.07%), Fuel & Power (+0.06%), Engineering (+0.03%), NBF1 (+0.01%), and Telecommunication (0.00%), respectively. Block trades contributed 11.9% of the overall market turnover. Genex Infosys Limited (+4.0%) was the most traded share with a turnover of BDT 292 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,216.95	6,199.20	+17.75	+0.29%	+0.2%
DS30	2,220.98	2,218.77	+2.21	+0.10%	+1.2%
DSES	1,359.66	1,356.38	+3.28	+0.24%	+0.1%
CDSET	1,220.75	1,220.56	+0.19	+0.02%	+0.5%

	Advanced	Declined	Unchanged	Total
All Category	107	57	148	312
A Category (Equity)	82	18	111	211
B Category (Equity)	23	28	31	82
N Category (Equity)	1	1	2	4
Z Category (Equity)	1	10	4	15
Mutual Funds	0	1	16	17
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,630,091	7,621,786	+0.1%
	Mn USD	71,728	71,650	
Turnover	Mn BDT	4,207	2,617	+60.7%
	Mn USD	40	25	
Volume	Mn Shares	61	34	+79.2%
No. of Trade	92,123	58,906	+56.4%	

* Average Interbank Exchange Rate is BDT 106.38 as of Feb 27, 2023

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Figure: Sectorial Turnover (BDT Mn)

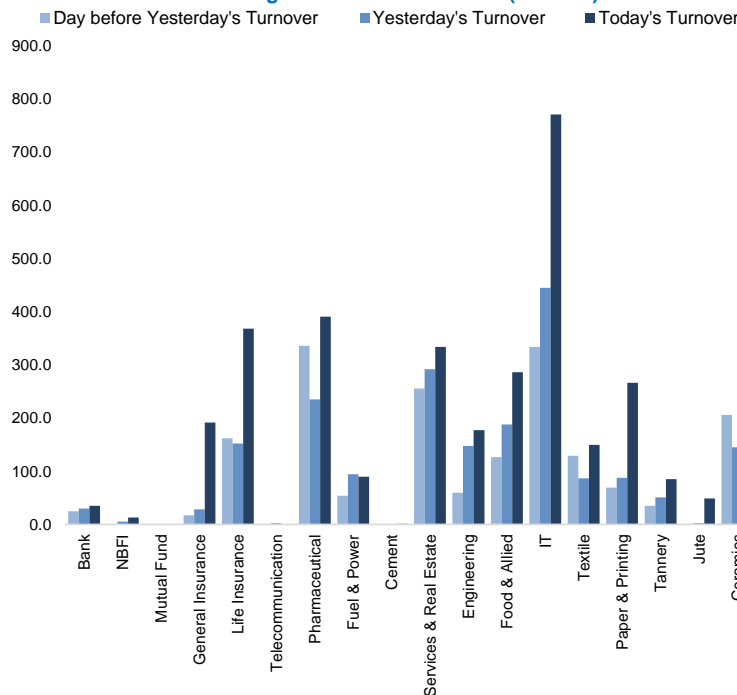
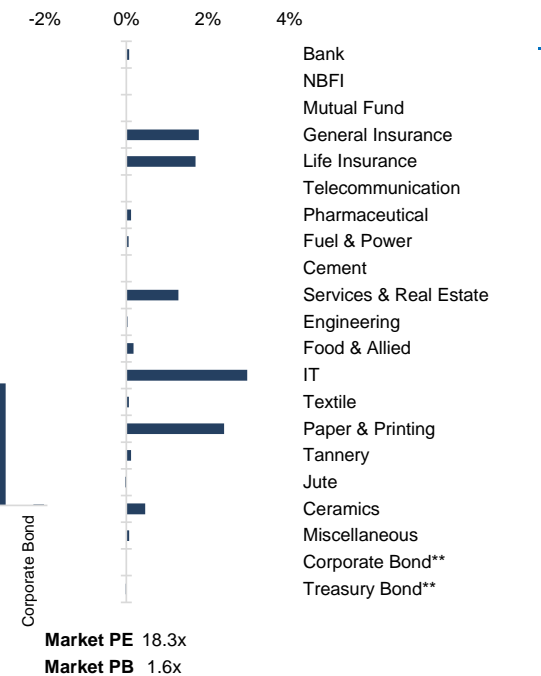


Figure: Sectorial Mcap Change



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	+1.01	+0.07%	34	669,231	8.9%	34.9	0.9%	7.8x	0.7x	GP	386,996	8.6%	0.0	12.9x	8.4x
NBFI	1,924	1,924	+0.27	+0.01%	23	187,691	2.5%	13.2	0.4%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	829	830	-0.04	-0.01%	37	37,510	0.5%	0.6	0.0%	NM	0.7x	BATBC	280,098	6.3%	0.8	15.7x	6.8x
General Insurance	3,074	3,020	+53.71	+1.78%	42	89,708	1.2%	191.4	5.2%	15.0x	1.5x	SQURPHARM/	185,977	4.2%	1.2	9.7x	1.8x
Life Insurance	2,539	2,496	+42.47	+1.70%	14	71,194	0.9%	368.1	9.9%	NM	NM	ROBI	157,138	3.5%	0.1	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.2	0.0%	16.8x	4.7x	RENATA	139,689	3.1%	0.1	31.1x	4.7x
Pharmaceutical	3,736	3,732	+4.41	+0.12%	34	724,794	9.6%	390.4	10.5%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,690	1,689	+1.00	+0.06%	23	445,659	5.9%	90.0	2.4%	17.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	9.0x	1.2x
Cement	2,309	2,309	-0.02	-0.00%	7	110,895	1.5%	1.4	0.0%	70.8x	2.5x	BERGERPBL	79,691	1.8%	0.7	27.0x	6.6x
Services & Real Esta	2,139	2,112	+27.03	+1.28%	8	84,520	1.1%	333.9	9.0%	35.9x	1.1x	MARICO	76,277	1.7%	0.1	20.7x	28.6x
Engineering	4,483	4,482	+1.40	+0.03%	42	526,191	7.0%	177.5	4.8%	53.9x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,399	21,361	+38.31	+0.18%	21	381,305	5.0%	286.2	7.7%	19.8x	8.0x	BEACONPHAR	69,161	1.5%	29.5	73.7x	11.2x
IT	3,173	3,082	+91.36	+2.96%	11	41,366	0.5%	771.0	20.8%	30.1x	2.8x	BXPHERMA	65,222	1.5%	0.7	14.1x	1.6x
Textile	1,574	1,573	+0.98	+0.06%	58	165,909	2.2%	149.6	4.0%	42.6x	1.0x	BRACBANK	57,619	1.3%	0.2	10.9x	1.0x
Paper & Printing	10,459	10,214	+245.06	+2.40%	6	40,296	0.5%	266.3	7.2%	39.8x	2.0x	ISLAMIBANK	53,774	1.2%	6.9	11.0x	0.8x
Tannery	3,067	3,063	+3.62	+0.12%	6	32,388	0.4%	85.2	2.3%	46.9x	3.1x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	12,865	12,869	-4.14	-0.03%	3	3,147	0.0%	48.6	1.3%	NM	5.0x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	696	692	+3.19	+0.46%	5	32,175	0.4%	266.2	7.2%	41.7x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,080	4,077	+2.91	+0.07%	14	222,137	2.9%	229.2	6.2%	13.1x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.7x	0.9x
Corporate Bond**	88	88	-	-	9	36,415	0.5%	1.8	0.0%	NM	NM	BSCCL	36,098	0.8%	0.1	14.3x	2.9x
Treasury Bond**	96	96	-0.02	-0.02%	252	3,069,939	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	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BGIC	49.0	+9.9%	0.3	30.6x	2.5x	SQURPHARMA	121,685	7.2%	9.7x	1.8x	GENEXIL	92.7	+4.0%	292.2	28.0x	5.0x
EMERALDOIL	31.5	+9.0%	7.6	NM	NM	BATBC	74,086	4.4%	15.7x	6.8x	ADNTEL	130.7	+6.4%	240.6	38.8x	4.6x
PRAGATILIF	114.8	+8.3%	62.6	NM	NM	BEXIMCO	71,930	4.3%	9.0x	1.2x	SPCERAMICS	45.5	+2.5%	215.4	84.3x	1.5x
CITYGENINS	28.9	+7.4%	6.0	12.8x	1.6x	RENATA	68,196	4.0%	31.1x	4.7x	BSC	132.1	+1.3%	192.1	8.8x	1.7x
METROSPIN	37.1	+7.2%	37.5	38.0x	1.8x	BEACONPHAR	48,413	2.9%	73.7x	11.2x	SEAPEARL	281.4	+1.5%	179.9	68.3x	19.9x
PRAGATIINS	63.0	+7.0%	6.9	10.8x	1.1x	BXPHERMA	45,538	2.7%	14.1x	1.6x	SONALIPAPR	635.6	+3.3%	136.4	68.0x	3.7x
RUPALILIFE	93.3	+6.5%	69.6	NM	NM	GP	38,700	2.3%	12.9x	8.4x	AAMRANET	59.7	+0.5%	117.2	18.7x	1.6x
ADNTEL	130.7	+6.4%	240.6	38.8x	4.6x	BRACBANK	30,976	1.8%	10.9x	1.0x	ORIONPHARM	83.0	+0.7%	107.8	23.6x	0.9x
MEGHNALIFE	82.9	+6.1%	52.9	NM	NM	LHBL	26,581	1.6%	18.4x	4.1x	OLYMPIC	148.7	+1.4%	103.5	19.3x	3.1x
POPULARLIF	70.1	+5.1%	10.7	NM	NM	ISLAMIBANK	24,155	1.4%	11.0x	0.8x	GEMINISEA	452.5	+3.1%	99.0	32.3x	26.3x
						NBL	19,116	1.1%	NM	0.6x						
						PUBALIBANK	18,525	1.1%	5.5x	0.6x						
						SEAPEARL	18,067	1.1%	68.3x	19.9x						
						OLYMPIC	18,035	1.1%	19.3x	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)					
AL-HAJTEX	153.8	-1.6%	75.5	NM	16.2x	IPDC	58.0	51.9	5.0	1,524	84.02					
MEGHNAINS	29.8	-1.0%	8.7	84.2x	2x	DHAKAINS	65.0	59.3	2.0	1,118	69.35					
RENWICKJA	745.1	-1.0%	0.3	NM	NM	SEAPEARL	282.5	253.2	8.0	257	67.55					
SAVAREFR	214.5	-1.0%	0.0	NM	2.3x	BEXGSUKUK	87.0	87.0	1.0	500	43.50					
FINEFOODS	61.5	-1.0%	1.7	NM	5.9x	BSC	138.0	135.1	2.0	220	29.78					
AMBEEPHEA	471.6	-1.0%	3.4	NM	21.9x	ADNTEL	126.8	118.0	11.0	231	28.48					
IMAMBUTTON	82.4	-1.0%	2.7	NM	17.1x	GP	288.0	261.6	5.0	94	25.80					
APEXSPINN	115.2	-0.9%	5.5	34.3x	1.9x	BSCCL	235.1	199.8	2.0	103	24.01					
SUNLIFEINS	52.7	-0.9%	4.2	NM	NM	SQURPHARMA	199.0	197.0	23.0	88	17.44					
SHYAMPSUG	63.5	-0.9%	1.2	NM	NM	RELIANCINS	57.0	57.0	1.0	210	11.97					

* 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
IPDC	58.0	51.9	84.0	1,524	5
DHAKAINS	65.0	59.3	69.3	1,118	2
SEAPEARL	282.5	253.2	67.6	257	8
BEXGSUKUK	87.0	87.0	43.5	500	1
BSC	138.0	135.1	29.8	220	2
ADNTEL	126.8	118.0	28.5	231	11
GP	288.0	261.6	25.8	94	5
BSCCL	235.1	199.8	24.0	103	2
SQURPHARMA	199.0	197.0	17.4	88	23
RELIANCINS	57.0	57.0	12.0	210	1
SONALIPAPR	661.0	582.0	10.6	17	14
ACFL	26.1	26.1	7.7	295	1
ACI	282.6	238.0	6.6	24	2
SILCOPHL	21.1	21.1	6.3	297	1
METROSPIN	36.6	31.2	6.1	181	5
MEGHNALIFE	72.5	70.5	5.0	69	2
NPOLYMER	51.0	51.0	4.4	87	1
RDFOOD	35.0	32.7	4.3	131	6
AL-HAJTEX	162.5	150.5	4.2	27	4
FORTUNE	83.2	68.2	3.8	51	5
GENNEXT	6.0	6.0	3.6	600	1
BATBC	479.8	479.8	3.3	7	5
Total			501.1		146

Important DSE News
IPDC

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2022. Date of AGM: 27.04.2023, Time: 11:00 AM, Venue: Digital Platform, Record Date: 21.03.2023. The Company has also reported EPS of Tk. 2.43, NAV per share of Tk. 18.33 with revaluation and Tk. 17.51 without revaluation, and NOCFPS of Tk. (11.26) for the year ended on December 31, 2022 as against Tk. 2.37, Tk. 17.12 with revaluation and Tk. 16.30 without revaluation, and Tk. (6.50) respectively for the same period of the previous year.

FUWANGFOOD

(Q2 Audited): The Board of Directors of the Company has recommended 0.50% interim cash dividend for the period ended December 31, 2022. Record date for entitlement of interim cash dividend: 21.03.2023. EPS was Tk. 0.14 for July-December 2022 as against Tk. 0.09 for July-December 2021. NOCFPS was Tk. 0.08 for July-December 2022 as against Tk. 0.40 for July-December 2021. NAV per share was Tk. 3.74 as on December 31, 2022 and Tk. 3.46 as on June 30, 2022.

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%	Record Date	6-Mar-23
PREMIERCEM		0.0%	10%	Record Date	6-Mar-23
CITYGENINS		0.0%	11%	Record Date	7-Mar-23
RECKITBEN		0.0%	980%	Record Date	13-Mar-23
ROBI		0.0%	7%	Record Date	13-Mar-23
IPDC		0.0%	10%	Record Date	21-Mar-23
FUWANGFOOD		0.0%	1%	Record Date	21-Mar-23

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