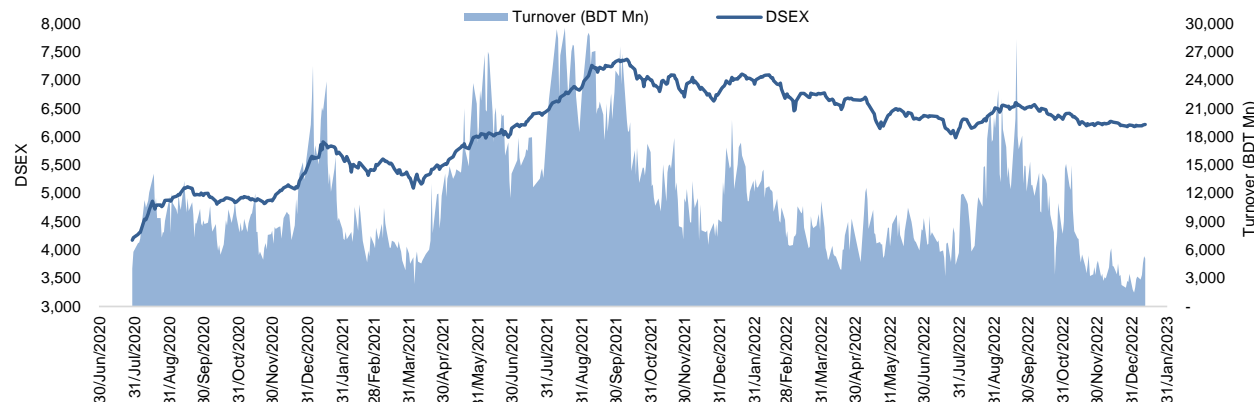


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.09%) gained 5.53 points and closed at 6,215.05. The blue-chip index DS30 (+0.01%), the Shariah-based index DSES (-0.01%), and the large-cap index CDSET (-0.02%) closed at 2,199.05, 1,357.58, and 1,215.43 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.06% followed by Bank (+0.05%), Engineering (+0.01%). Food & Allied experienced the highest loss of 0.16% followed by Fuel & Power (-0.04%), NBF1 (-0.01%). Block trades contributed 11.3% of the overall market turnover. Bangladesh Shipping Corporation (+1.4%) was the most traded share with a turnover of BDT 399 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,215.05	6,209.52	+5.53	+0.09%	+0.1%
DS30	2,199.05	2,198.76	+0.28	+0.01%	+0.2%
DSES	1,357.58	1,357.69	-0.10	-0.01%	-0.1%
CDSET	1,215.43	1,215.63	-0.20	-0.02%	+0.1%

	Advanced	Declined	Unchanged	Total
All Category	52	113	171	336
A Category (Equity)	40	55	122	217
B Category (Equity)	9	43	39	91
N Category (Equity)	3	3	3	9
Z Category (Equity)	0	12	7	19
Mutual Funds	0	2	15	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	7,546,920	7,548,201	-0.0%
	Mn USD	70,532	70,544	-0.0%
Turnover	Mn BDT	5,076	5,324	-4.7%
	Mn USD	47	50	-4.7%
Volume	Mn Shares	73	81	-10.2%
	No. of Trade	110,581	107,318	+3.0%

\* Average Interbank Exchange Rate is BDT 107.00 as of Jan 11, 2023

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Figure: Sectorial Turnover (BDT Mn)

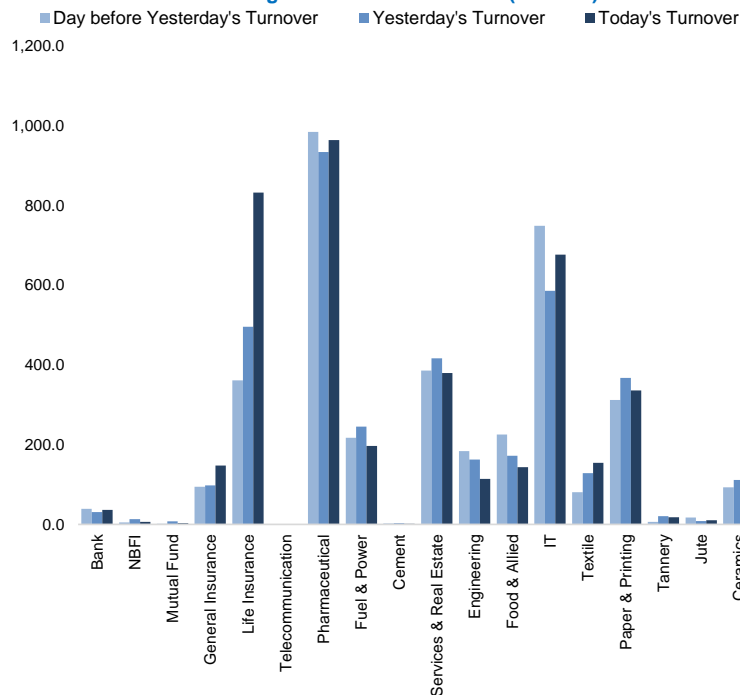
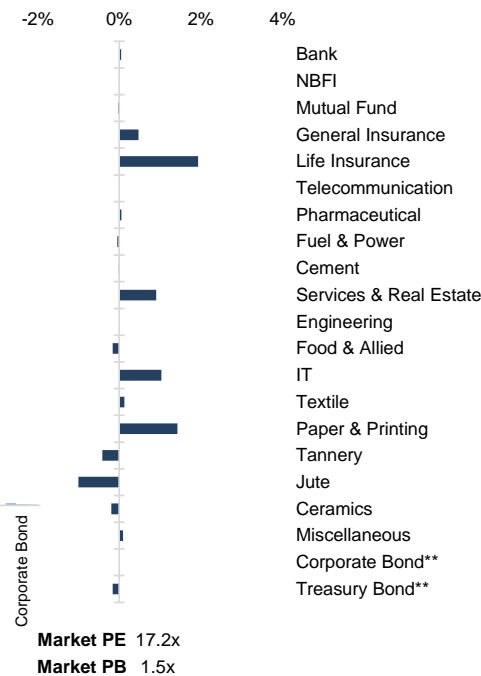


Figure: Sectorial Mcap Change



Market PE 17.2x

Market PB 1.5x

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	1,428	1,428	+0.66	+0.05%	34	667,188	8.8%	36.3	0.8%	7.7x	0.7x	GP	386,996	8.6%	0.6	11.2x	9.1x
NBFI	1,926	1,927	-0.15	-0.01%	23	187,938	2.5%	6.4	0.1%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	850	850	-0.19	-0.02%	37	38,434	0.5%	2.9	0.1%	NM	0.8x	BATBC	280,098	6.3%	1.0	16.8x	6.7x
General Insurance	3,152	3,137	+14.86	+0.47%	42	91,991	1.2%	147.8	3.3%	15.4x	1.5x	SQURPHARMA	185,977	4.2%	1.0	10.0x	1.7x
Life Insurance	2,629	2,579	+49.96	+1.94%	14	73,722	1.0%	832.3	18.5%	NM	NM	ROBI	157,138	3.5%	0.1	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.8	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.2	28.1x	4.6x
Pharmaceutical	3,754	3,751	+2.10	+0.06%	34	728,128	9.6%	964.0	21.4%	18.6x	2.4x	UPGDCL	135,475	3.0%	0.1	13.6x	3.8x
Fuel & Power	1,693	1,694	-0.73	-0.04%	23	446,348	5.9%	197.0	4.4%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.3	8.2x	1.2x
Cement	2,319	2,319	-0.33	-0.01%	7	111,381	1.5%	1.9	0.0%	33.5x	2.5x	BERGERPBL	80,415	1.8%	1.2	26.1x	7.0x
Services & Real Estate	1,937	1,920	+17.50	+0.91%	8	76,547	1.0%	379.4	8.4%	43.3x	1.0x	MARICO	76,277	1.7%	0.4	21.3x	44.9x
Engineering	4,490	4,489	+0.36	+0.01%	42	526,937	7.0%	114.5	2.5%	38.6x	1.8x	ICB	74,119	1.7%	0.0	68.1x	1.6x
Food & Allied	21,145	21,179	-33.64	-0.16%	21	376,772	5.0%	143.8	3.2%	21.4x	7.4x	BEACONPHAR	66,944	1.5%	25.2	82.3x	10.8x
IT	3,161	3,128	+32.40	+1.04%	11	41,207	0.5%	676.3	15.0%	29.4x	2.8x	BXPBARMA	65,266	1.5%	30.3	12.8x	1.6x
Textile	1,606	1,604	+2.08	+0.13%	58	168,893	2.2%	154.5	3.4%	30.7x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	10,852	10,699	+152.72	+1.43%	6	41,813	0.6%	335.7	7.5%	47.0x	2.1x	ISLAMIBANK	53,130	1.2%	2.3	10.8x	0.8x
Tannery	3,055	3,068	-12.55	-0.41%	6	32,265	0.4%	18.1	0.4%	39.2x	3.0x	DUTCHBANGL	43,554	1.0%	0.6	7.4x	1.1x
Jute	13,460	13,595	-135.45	-1.00%	3	3,293	0.0%	10.4	0.2%	NM	116.2x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	697	698	-1.33	-0.19%	5	32,238	0.4%	68.0	1.5%	33.7x	1.9x	POWERGRID	37,347	0.8%	0.0	38.5x	0.4x
Miscellaneous	4,102	4,098	+3.94	+0.10%	14	221,058	2.9%	412.2	9.2%	12.4x	1.8x	SUMITPOWER	36,308	0.8%	0.6	10.0x	0.9x
Corporate Bond**	88	88	-	-	9	36,414	0.5%	1.3	0.0%	NM	NM	BSCCL	36,098	0.8%	0.0	14.9x	3.4x
Treasury Bond**	96	96	-0.15	-0.16%	252	3,066,269	40.6%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
JHRML	93.3	+9.6%	280.8	28.0x	3.0x
SUNLIFEINS	59.8	+6.6%	37.9	NM	NM
MALEKSPIN	28.7	+5.9%	101.0	7.1x	0.6x
BENGALWTL	32.7	+5.8%	57.1	64.1x	1.3x
MEGHNALIFE	78.2	+5.5%	145.8	NM	NM
BGIC	68.9	+5.2%	28.3	43.1x	3.5x
BPML	90.2	+5.0%	300.5	24.2x	1x
PRAGATILIF	147.4	+4.8%	137.3	NM	NM
NAVANAPHAR	85.7	+4.4%	134.7	22.8x	1.8x
POPULARLIF	73.8	+4.4%	45.0	NM	NM

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	372.2	-8.5%	188.4	NM	25.1x
BDTHAIFOOD	42.9	-6.1%	47.8	NM	3x
MONOSPOOL	229.9	-5.8%	29.8	34.3x	5.0x
KOHINOOR	413.7	-2.9%	10.4	38.2x	7.6x
INTRACO	39.5	-2.5%	164.6	32.0x	3.1x
GEMINISEA	351.8	-2.1%	42.2	25.6x	19.1x
AAMRATECH	39.5	-1.7%	34.2	25.3x	1.7x
MONNOCERA	114.4	-1.4%	66.8	NM	1.4x
SAPORTL	30.3	-1.3%	47.1	21.2x	0.9x
LRBDL	36.4	-1.1%	25.2	16.9x	0.9x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,685	7.2%	10.0x	1.7x
BATBC	74,086	4.4%	16.8x	6.7x
BEXIMCO	70,355	4.2%	8.2x	1.2x
RENATA	68,196	4.1%	28.1x	4.6x
BEACONPHAR	46,861	2.8%	82.3x	10.8x
BXPBARMA	45,569	2.7%	12.8x	1.6x
GP	38,700	2.3%	11.2x	9.1x
BRACBANK	30,976	1.8%	10.9x	1.0x
LHBL	26,581	1.6%	18.4x	4.1x
ISLAMIBANK	23,866	1.4%	10.8x	0.8x
NBL	19,116	1.1%	NM	0.6x
PUBALIBANK	18,596	1.1%	5.5x	0.6x
CITYBANK	17,615	1.0%	4.5x	0.8x
ROBI	15,714	0.9%	NM	2.4x
OLYMPIC	14,894	0.9%	19.5x	2.5x
ALARABANK	14,609	0.9%	14.6x	1.1x
BSRMLTD	14,417	0.9%	62.6x	0.7x
SEAPEARL	14,317	0.9%	82.6x	17.1x
ORIONPHARM	13,672	0.8%	21.3x	0.9x
UPGDCL	13,547	0.8%	13.6x	3.8x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BSC	126.1	+1.4%	398.9	8.7x	1.6x
BPML	90.2	+5.0%	300.5	24.2x	1.2x
JHRML	93.3	+9.6%	280.8	28.0x	3.0x
GENEXIL	87.6	+2.3%	247.6	25.3x	4.8x
ORIONPHARM	85.9	+1.3%	220.0	21.3x	0.9x
ORIONINFU	372.2	-8.5%	188.4	NM	25.1x
INTRACO	39.5	-2.5%	164.6	32.0x	3.1x
EHL	88.0	+3.7%	150.4	14.3x	1.2x
SEAPEARL	223.0	+2.2%	146.3	82.6x	17.1x
MEGHNALIFE	78.2	+5.5%	145.8	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEXIMCO	125.1	104.1	15.0	2,042	230.65
SEAPEARL	215.0	199.5	9.0	183	38.20
SONALIPAPR	661.1	569.0	5.0	54	33.77
NATLIFEINS	177.0	177.0	3.0	144	25.48
INTRACO	44.5	37.9	4.0	629	23.99
BEACONPHAR	275.0	275.0	1.0	80	22.00
ADNTEL	128.5	120.0	2.0	158	19.98
SALVOCHEM	61.8	55.7	4.0	319	19.58
POWERGRID	50.0	47.2	2.0	265	13.21
JHRML	93.6	77.2	3.0	154	12.85

\* 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
BEXIMCO	125.1	104.1	230.7	2,042	15
SEAPPEARL	215.0	199.5	38.2	183	9
SONALIPAPR	661.1	569.0	33.8	54	5
NATLIFEINS	177.0	177.0	25.5	144	3
INTRACO	44.5	37.9	24.0	629	4
BEACONPHAR	275.0	275.0	22.0	80	1
ADNTEL	128.5	120.0	20.0	158	2
SALVOCHEM	61.8	55.7	19.6	319	4
POWERGRID	50.0	47.2	13.2	265	2
JHRML	93.6	77.2	12.9	154	3
BATBC	490.0	479.8	11.2	23	14
PTL	82.0	70.0	11.2	137	2
HRTEX	114.5	114.0	8.8	77	2
BSC	123.5	119.9	8.6	72	5
KDSALTD	77.0	69.4	7.9	107	5
SQURPHARMA	200.0	198.0	7.6	38	14
BRACBANK	34.7	34.7	7.2	208	3
BENGALWTL	30.2	29.0	6.2	210	2
BDTHAIFOOD	50.0	50.0	5.4	108	1
METROSPIN	44.5	42.5	5.3	120	6
GP	263.9	261.6	5.2	20	8
BSCCL	217.9	199.8	4.7	23	4
<b>Total</b>			<b>571.9</b>		<b>168</b>

**Important DSE News**
**PRIMELIFE**

**(Q1 Un-audited):** As per consolidated life revenue account of the company for January to March, 2022, excess of total expenses over total income (deficit) was BDT 885.25 million as against excess of total expenses over total income (deficit) BDT 866.13 million in the corresponding previous period 2021. Accordingly, Balance of Life Insurance Fund as on March 31, 2022 was BDT 7,176.01 million as against BDT 7,489.39 million as on March 31, 2021 resulting a net decrease of BDT 313.38 million.

**PRIMELIFE**

**(Q2 Un-audited):** As per consolidated life revenue account of the company for April to June, 2022, excess of total expenses over total income (deficit) was BDT 108.21 million as against excess of total expenses over total income (deficit) BDT 219.50 million in the corresponding previous period 2021. Whereas life revenue account of the company for January to June, 2022, excess of total expenses over total income (deficit) was BDT 993.45 million as against excess of total expenses over total income (deficit) BDT 1,085.63 million in the corresponding previous period 2021. Accordingly, Balance of Life Insurance Fund as on June 30, 2022 was BDT 7,085.74 million as against BDT 7,262.26 million as on June 30, 2021 resulting a net decrease of BDT 176.52 million.

**PRIMELIFE**

**(Q3 Un-audited):** As per consolidated life revenue account of the company for July to September, 2022, excess of total income over total expenses (surplus) was BDT 32.63 million as against excess of total income over total expenses (surplus) BDT 19.40 million in the corresponding previous period 2021. Whereas life revenue account of the company for January to September, 2022, excess of total expenses over total income (deficit) was BDT 960.83 million as against excess of total expenses over total income (deficit) BDT 1,066.23 million in the corresponding previous period 2021. Accordingly, Balance of Life Insurance Fund as on September 30, 2022 was BDT 7,132.62 million as against BDT 7,260.96 million as on September 30, 2021 resulting a net decrease of BDT 128.34 million.

**DBH**

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'DBH Finance PLC' instead of 'Delta Brac Housing Finance Corporation Limited' with effect from January 12, 2023. Other things (except name) will remain unchanged.

**AFCAGRO**

Dhaka Stock Exchange Limited (DSE) has accorded its consent to transfer 28,18,500 shares of AFC Agro Biotech Ltd. outside the trading system of the exchange from Active Fine Chemicals Ltd. (the transferor), one of the Sponsors of the Company to Dhaka Bank Limited, Banani Branch (the transferee) within 30 working days from the date of issuance of approval letter by DSE, under Regulation - 47 of the Dhaka Stock Exchange (Listing) Regulations, 2015.

**GENNEXT**

The Company will be placed in 'B' category from existing 'Z' category with effect from January 15, 2023 as the Company has reported disbursement of 1% cash dividend for the year ended June 30, 2022.

**GENNEXT**

The Stock Brokers and Merchant Bankers are requested to abstain from providing loan facilities to purchase security of Generation Next Fashions Limited in between 1st to 7th trading days after change of categorization, with effect from January 15, 2023 as per BSEC Directive No. BSEC/CMRRCD/2009-193/32 dated December 26, 2021.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

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