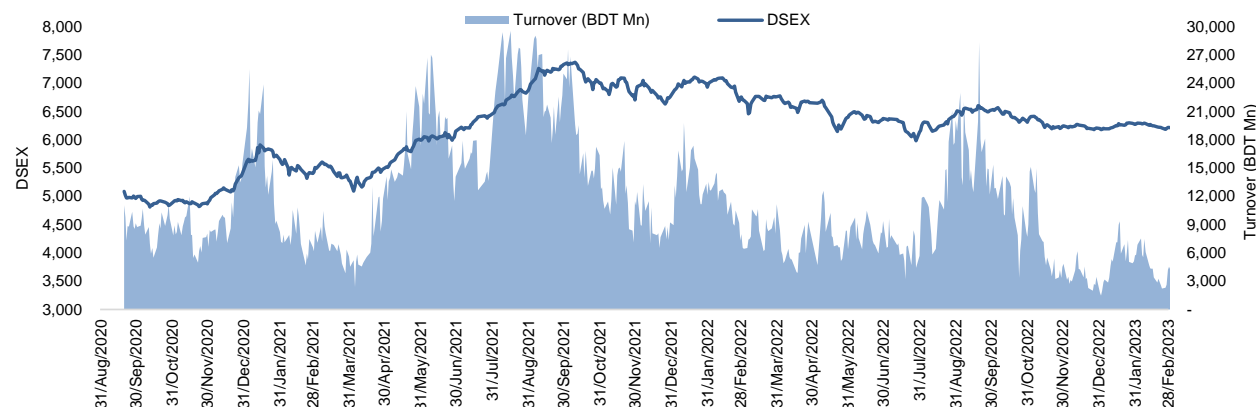


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.02%) lost 0.95 points and closed at 6,213.74. The blue-chip index DS30 (-0.09%), the Shariah-based index DSES (-0.03%), and the large-cap index CDSET (-0.14%) closed at 2,216.29, 1,357.29, and 1,218.26 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.27% followed by Pharmaceutical (-0.20%), Food & Allied (-0.10%), Bank (-0.01%), Engineering (-0.01%), Telecommunication (0.00%), and Fuel & Power (+0.02%), respectively. Block trades contributed 15.2% of the overall market turnover. ADN Telecom Limited (+10.0%) was the most traded share with a turnover of BDT 354 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,213.74	6,214.69	-0.95	-0.02%	+0.1%
DS30	2,216.29	2,218.35	-2.06	-0.09%	+1.0%
DSES	1,357.29	1,357.75	-0.46	-0.03%	-0.1%
CDSET	1,218.26	1,219.91	-1.65	-0.14%	+0.3%

	Advanced	Declined	Unchanged	Total
All Category	73	88	150	311
A Category (Equity)	32	62	115	209
B Category (Equity)	34	18	31	83
N Category (Equity)	0	2	2	4
Z Category (Equity)	7	6	2	15
Mutual Funds	1	2	13	16
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,631,155	7,629,171	+0.0%
	Mn USD	72,169	72,150	
Turnover	Mn BDT	4,277	4,524	-5.5%
	Mn USD	40	43	
Volume	Mn Shares	57	67	-15.0%
	No. of Trade	86,066	100,040	-14.0%

\* Average Interbank Exchange Rate is BDT 105.74 as of Mar 01, 2023

<b>Fahim Hassan</b> Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	<b>Md. Tanvir Ahmed</b> Research Associate (880) 1708805201 mtanvir.ahmed@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

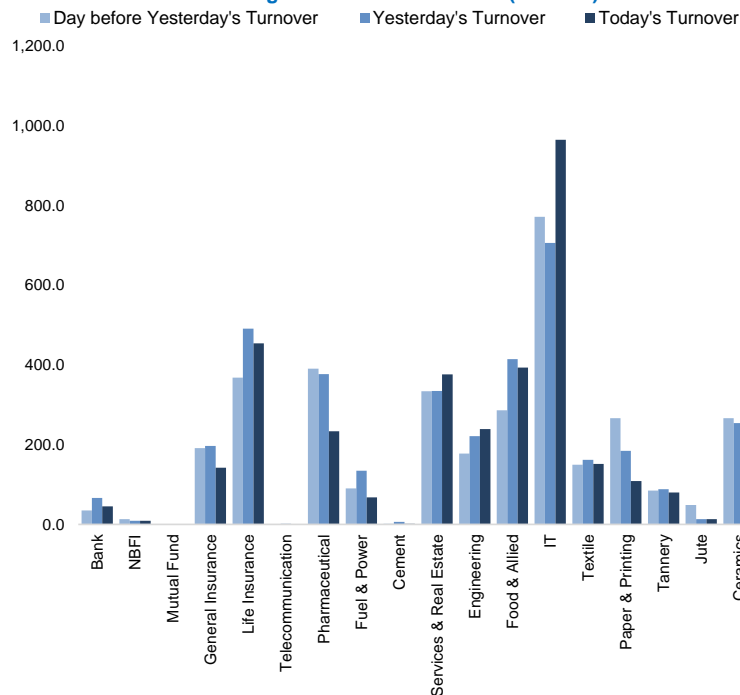
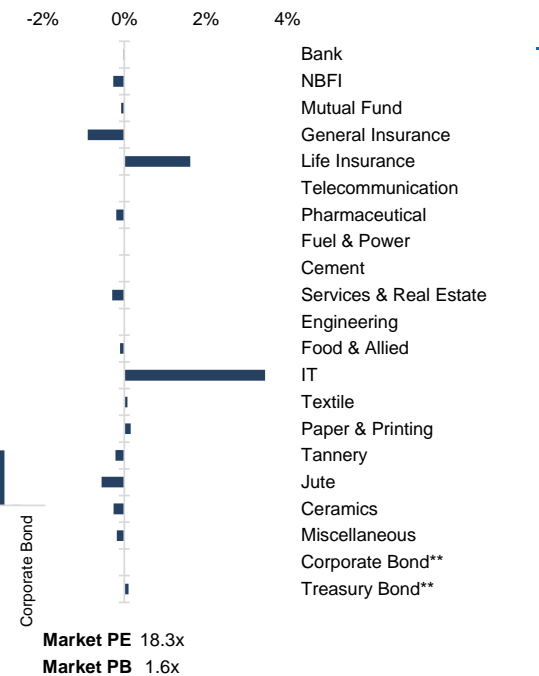


Figure: Sectorial Mcap Change



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	1,433	1,433	-0.21	-0.01%	34	669,171	8.9%	45.1	1.2%	7.8x	0.7x	GP	386,996	8.6%	0.1	12.9x	8.4x
NBFI	1,919	1,924	-5.27	-0.27%	23	187,227	2.5%	9.3	0.3%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	829	829	-0.64	-0.08%	37	37,479	0.5%	0.7	0.0%	NM	0.7x	BATBC	280,098	6.3%	0.0	15.7x	6.8x
General Insurance	3,091	3,119	-28.05	-0.90%	42	90,220	1.2%	141.9	3.9%	15.2x	1.5x	SQURPHARM/	185,977	4.2%	0.8	9.7x	1.8x
Life Insurance	2,590	2,549	+41.21	+1.62%	14	72,637	1.0%	453.8	12.5%	NM	NM	ROBI	157,138	3.5%	0.7	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.8	0.0%	16.8x	4.7x	RENATA	139,689	3.1%	0.3	31.1x	4.7x
Pharmaceutical	3,721	3,728	-7.28	-0.20%	34	721,757	9.6%	233.6	6.4%	18.6x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,690	1,689	+0.33	+0.02%	23	445,725	5.9%	67.7	1.9%	17.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	9.0x	1.2x
Cement	2,309	2,309	+0.34	+0.01%	7	110,901	1.5%	1.7	0.0%	70.8x	2.5x	BERGERPBL	79,816	1.8%	0.0	27.0x	6.6x
Services & Real Esta	2,112	2,118	-6.30	-0.30%	8	83,437	1.1%	376.1	10.4%	35.5x	1.1x	MARICO	76,277	1.7%	0.1	20.7x	28.6x
Engineering	4,484	4,484	-0.29	-0.01%	42	526,263	7.0%	239.1	6.6%	53.9x	2.1x	ICB	74,119	1.7%	0.1	NM	1.7x
Food & Allied	21,392	21,415	-22.12	-0.10%	21	381,182	5.0%	393.3	10.8%	19.8x	8.0x	BEACONPHAR	67,198	1.5%	32.2	71.7x	10.9x
IT	3,272	3,163	+109.23	+3.45%	11	42,657	0.6%	964.1	26.6%	31.1x	2.9x	BXPHERMA	65,222	1.5%	0.4	14.1x	1.6x
Textile	1,579	1,578	+1.20	+0.08%	58	166,414	2.2%	152.0	4.2%	42.7x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	10,223	10,207	+15.72	+0.15%	6	39,387	0.5%	109.0	3.0%	38.9x	2.0x	ISLAMIBANK	53,774	1.2%	4.7	11.0x	0.8x
Tannery	3,070	3,077	-6.71	-0.22%	6	32,425	0.4%	79.9	2.2%	47.0x	3.1x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	12,682	12,752	-70.75	-0.55%	3	3,102	0.0%	13.2	0.4%	NM	4.9x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	696	697	-1.82	-0.26%	5	32,171	0.4%	206.3	5.7%	41.7x	1.9x	SUMITGRID	37,347	0.8%	0.2	NM	0.4x
Miscellaneous	4,073	4,081	-7.56	-0.19%	14	221,791	2.9%	137.9	3.8%	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%	0.0	14.3x	2.9x
Treasury Bond**	96	96	+0.10	+0.10%	252	3,073,077	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
ADNTEL	141.0	+10.0%	353.9	41.8x	4.9x	SQURPHARMA	121,685	7.2%	9.7x	1.8x	ADNTEL	141.0	+10.0%	353.9	41.8x	4.9x
SHYAMPSUG	69.4	+10.0%	2.3	NM	NM	BATBC	74,086	4.4%	15.7x	6.8x	GENEXIL	95.1	+3.0%	269.1	28.8x	5.1x
ZEALBANGLA	137.3	+9.8%	0.6	NM	NM	BEXIMCO	71,930	4.3%	9.0x	1.2x	SEAPEARL	275.2	-0.4%	236.5	66.8x	19.4x
BGIC	59.2	+9.8%	3.7	37.0x	3.0x	RENATA	68,196	4.0%	31.1x	4.7x	DELTALIFE	146.0	+5.0%	201.5	NM	NM
HAKKANIPUL	52.2	+8.7%	3.5	NM	2.3x	BEACONPHAR	47,039	2.8%	71.7x	10.9x	AAMRANET	63.2	+4.8%	165.9	19.8x	1.7x
MEGHNAPET	30.0	+8.3%	10.3	NM	NM	BXPHERMA	45,538	2.7%	14.1x	1.6x	GEMINISEA	475.0	+5.5%	163.4	33.9x	27.6x
GEMINISEA	475.0	+5.5%	163.4	33.9x	28x	GP	38,700	2.3%	12.9x	8.4x	SPCERAMICS	45.8	-	158.5	84.8x	1.5x
DELTALIFE	146.0	+5.0%	201.5	NM	NM	BRACBANK	30,976	1.8%	10.9x	1.0x	BSC	128.9	-1.4%	120.8	8.6x	1.6x
AAMRANET	63.2	+4.8%	165.9	19.8x	1.7x	LHBL	26,581	1.6%	18.4x	4.1x	OLYMPIC	147.1	-1.9%	118.9	19.1x	3.1x
LEGACYFOOT	40.8	+4.6%	2.4	NM	4.5x	ISLAMIBANK	24,155	1.4%	11.0x	0.8x	AL-HAJTEX	172.0	+3.9%	117.5	NM	18.2x

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)
ILFSL	5.6	-9.7%	0.3	NM	NM	ADNTEL	132.0	118.1	17.0	2,838	340.02
UNIONCAP	9.0	-9.1%	0.3	NM	NM	DHAKAINS	71.6	61.0	2.0	1,225	80.95
PREMIERLEA	6.8	-8.1%	0.0	NM	NM	AL-HAJTEX	165.0	155.0	36.0	368	58.73
ICICL	31.8	-7.0%	18.2	35.2x	2.0x	SEAPEARL	281.0	252.3	6.0	120	31.11
USMANIAGL	50.2	-6.2%	0.7	NM	0.6x	SONALIPAPR	640.0	569.0	32.0	41	23.87
MONNOAGML	1,024.1	-5.7%	76.7	NM	5.9x	ANWARGALV	213.0	199.0	3.0	96	20.48
CITYGENINS	27.5	-5.2%	5.6	12.2x	1.5x	BARKAPOWERR	19.2	19.2	1.0	1,025	19.68
ICBAMCL2ND	8.7	-4.4%	0.1	NM	1.4x	GP	263.0	262.5	8.0	69	18.18
BIFC	9.5	-4.0%	0.0	NM	NM	SQURPHARMA	199.9	197.5	16.0	71	14.05
EMERALDOIL	30.0	-3.8%	7.1	NM	NM	IPDC	57.6	51.9	6.0	175	9.84

\* 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
ADNTEL	132.0	118.1	340.0	2,838	17
DHAKAINS	71.6	61.0	80.9	1,225	2
AL-HAJTEX	165.0	155.0	58.7	368	36
SEAPEARL	281.0	252.3	31.1	120	6
SONALIPAPR	640.0	569.0	23.9	41	32
ANWARGALV	213.0	199.0	20.5	96	3
BARKAPOWER	19.2	19.2	19.7	1,025	1
GP	263.0	262.5	18.2	69	8
SQURPHARMA	199.9	197.5	14.1	71	16
IPDC	57.6	51.9	9.8	175	6
NCCBANK	13.8	12.5	8.1	628	10
RDFOOD	34.9	33.8	2.9	86	3
PRAGATILIF	130.3	130.2	2.7	21	2
SAIFPOWER	28.9	26.8	2.2	82	4
RENATA	1,200.0	1,141.8	1.7	2	3
MARICO	2,300.5	2,300.5	1.6	1	3
BDCOM	41.2	41.0	1.3	32	2
LHBL	63.4	63.4	1.3	20	2
FUWANGFOOD	21.2	21.2	1.2	54	1
BSC	138.0	138.0	1.1	8	1
AAMRATECH	35.0	35.0	1.1	30	1
BPPL	32.1	32.1	1.0	33	1
<b>Total</b>			<b>651.5</b>		<b>175</b>

**Important DSE News**
**OLYMPIC**

The company has informed that the Board of Directors has decided to purchase a land measuring 86 Decimals at a total cost of BDT 2,75,20,000.00 only located at Lolati, Sonargaon Upazila, Narayanganj attached behind the Biscuit and Confectionery unit of the company at Lolati. The company will also have to spend BDT 28,89,600.00 as registration charges and other miscellaneous expenses including fees for obtaining certified copy of purchase deed.

**GPHISPAT**

The Company has informed that the Board of Directors has appointed Mr. H. M. Ashraf-Uz-Zaman, FCA as acting company secretary of the company in place of Mr. Abu Bakar Siddique, FCMA with effect from March 01, 2023.

**GEMINISEA**

The Company has informed that the Board of Directors has appointed Mr. Md. Hedayet Ullah Chowdhury as an Independent Director of the company with effect from January 01, 2023.

**AMANFEED**

The Company has informed that the Board of Directors has approved the appointment of Mr. Partha Protim Das, FCS as Company Secretary of the company.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
GREENDELT		0.0%	25%	Record Date	22-Mar-23

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