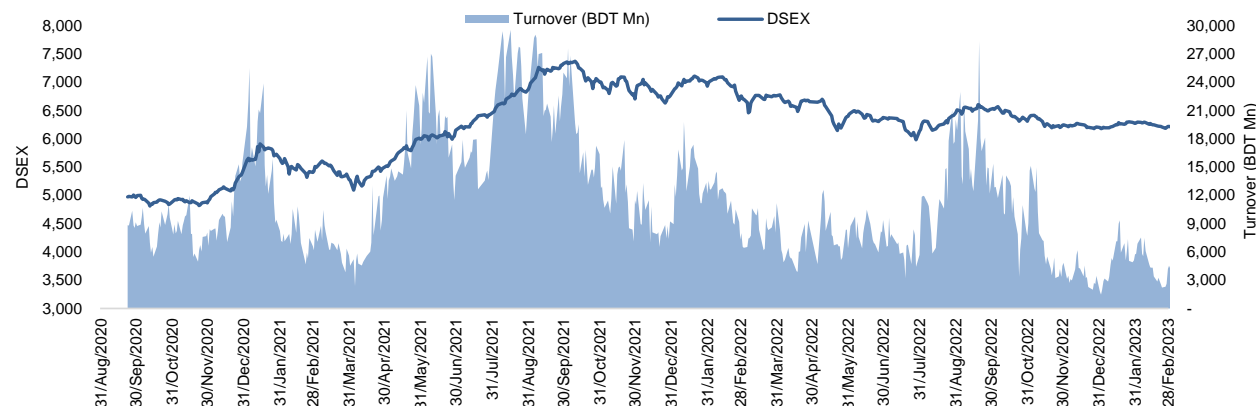


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.05%) gained 2.84 points and closed at 6,262.31. The blue-chip index DS30 (0.00%), the Shariah-based index DSES (-0.02%), and the large-cap index CDSET (-0.05%) closed at 2,225.88, 1,361.58, and 1,217.04 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.18% followed by Bank (+0.15%), Telecommunication (0.00%). Engineering experienced the highest loss of 0.08% followed by Pharmaceutical (-0.08%), NBF1 (-0.05%), Food & Allied (-0.04%). Block trades contributed 9.3% of the overall market turnover. Eastern Housing Limited (+4.4%) was the most traded share with a turnover of BDT 377 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,262.31	6,259.48	+2.84	+0.05%	+0.9%
DS30	2,225.88	2,225.98	-0.10	-0.00%	+1.4%
DSES	1,361.58	1,361.83	-0.25	-0.02%	+0.2%
CDSET	1,217.04	1,217.61	-0.57	-0.05%	+0.2%

	Advanced	Declined	Unchanged	Total
All Category	59	111	184	354
A Category (Equity)	47	66	126	239
B Category (Equity)	8	39	48	95
N Category (Equity)	1	1	2	4
Z Category (Equity)	3	5	8	16
Mutual Funds	3	0	24	27
Corporate Bonds	0	1	1	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,657,433	7,652,621	+0.1%
	Mn USD	71,874	71,829	
Turnover	Mn BDT	6,495	7,274	-10.7%
	Mn USD	61	68	
Volume	Mn Shares	95	129	-26.3%
	No. of Trade	131,915	144,348	-8.6%

* Average Interbank Exchange Rate is BDT 106.54 as of Mar 06, 2023

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md. Tanvir Ahmed Research Associate (880) 1708805201 mtanvir.ahmed@bracepl.com
---	--

Figure: Sectorial Turnover (BDT Mn)

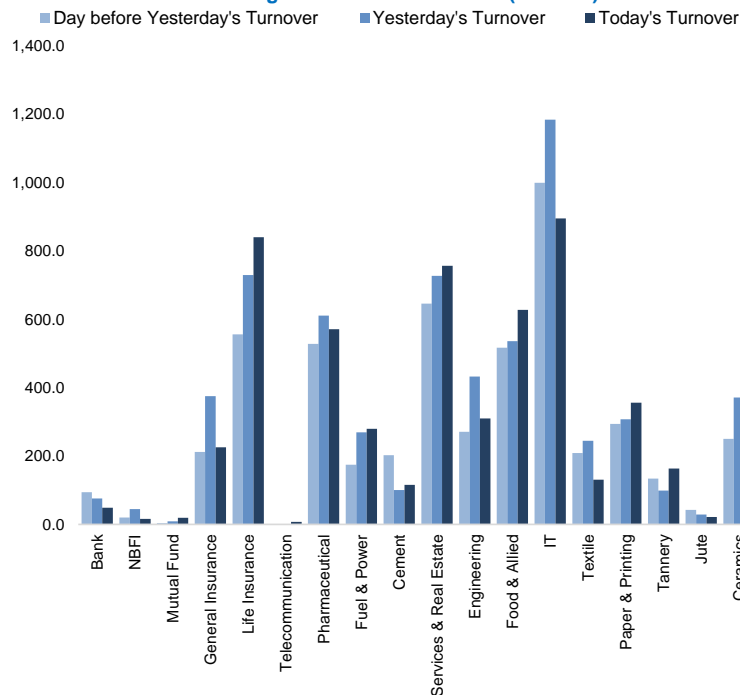
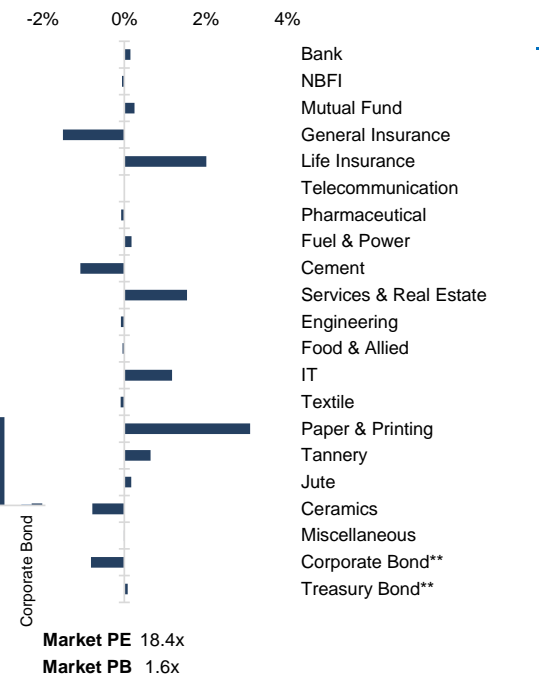


Figure: Sectorial Mcap Change



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	1,436	1,434	+2.17	+0.15%	34	670,804	8.8%	48.7	0.8%	7.8x	0.7x	GP	386,996	8.6%	7.2	12.9x	8.4x
NBFI	1,918	1,919	-1.04	-0.05%	23	187,110	2.5%	16.4	0.3%	NM	4.4x	WALTONHIL	317,378	7.0%	0.2	40.4x	4.8x
Mutual Fund	829	827	+2.05	+0.25%	37	37,484	0.5%	19.8	0.3%	NM	0.7x	BATBC	280,098	6.2%	1.0	15.7x	6.8x
General Insurance	3,194	3,243	-48.82	-1.51%	42	93,222	1.2%	225.2	3.8%	15.7x	1.5x	SQURPHARM/	185,977	4.1%	1.8	9.7x	1.8x
Life Insurance	2,710	2,657	+53.50	+2.01%	14	76,012	1.0%	840.1	14.3%	NM	NM	ROBI	157,138	3.5%	0.2	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	7.5	0.1%	16.8x	4.7x	RENATA	139,689	3.1%	0.2	31.1x	4.7x
Pharmaceutical	3,720	3,723	-2.87	-0.08%	34	721,543	9.5%	570.7	9.7%	18.6x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,699	1,696	+3.01	+0.18%	23	448,278	5.9%	279.9	4.8%	17.8x	1.1x	BEXIMCO	103,571	2.3%	2.9	9.0x	1.2x
Cement	2,311	2,336	-25.14	-1.08%	7	111,012	1.5%	115.3	2.0%	58.0x	2.6x	BERGERPBL	80,452	1.8%	0.0	27.2x	6.7x
Services & Real Esta	2,306	2,271	+34.87	+1.54%	8	91,105	1.2%	756.9	12.9%	38.7x	1.2x	MARICO	76,277	1.7%	0.2	20.7x	28.6x
Engineering	4,486	4,490	-3.61	-0.08%	42	526,563	6.9%	309.8	5.3%	56.2x	2.1x	ICB	74,119	1.6%	0.0	NM	1.7x
Food & Allied	21,428	21,438	-9.03	-0.04%	21	381,824	5.0%	627.2	10.6%	19.8x	8.0x	BXPHERMA	65,222	1.4%	0.6	14.1x	1.6x
IT	3,441	3,401	+39.86	+1.17%	11	44,859	0.6%	894.7	15.2%	32.7x	3.1x	BEACONPHAR	64,680	1.4%	26.1	69.0x	10.5x
Textile	1,581	1,583	-1.45	-0.09%	58	166,641	2.2%	130.9	2.2%	42.8x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	11,086	10,754	+331.81	+3.09%	6	42,712	0.6%	356.4	6.1%	42.2x	2.1x	ISLAMIBANK	54,418	1.2%	3.7	11.1x	0.8x
Tannery	3,113	3,093	+19.92	+0.64%	6	32,879	0.4%	163.3	2.8%	47.6x	3.2x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	13,076	13,054	+22.12	+0.17%	3	3,199	0.0%	21.6	0.4%	NM	5.1x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	702	708	-5.55	-0.78%	5	32,472	0.4%	241.4	4.1%	42.0x	1.9x	SEAPEARL	37,831	0.8%	270.3	76.0x	22.1x
Miscellaneous	4,106	4,106	-0.30	-0.01%	14	223,560	2.9%	258.3	4.4%	13.2x	1.8x	POWERGRID	37,347	0.8%	0.2	NM	0.4x
Corporate Bond**	88	89	-0.73	-0.82%	9	36,405	0.5%	5.5	0.1%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	10.7x	0.9x
Treasury Bond**	96	96	+0.08	+0.08%	252	3,072,102	40.5%	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
CAPMIBLMF	11.1	+9.9%	4.9	NM	1.2x	SQURPHARMA	121,685	7.2%	9.7x	1.8x	EHL	106.3	+4.4%	377.1	16.7x	1.4x
MEGHNAPET	33.6	+9.8%	6.1	NM	NM	BATBC	74,086	4.4%	15.7x	6.8x	GEMINISEA	491.4	+3.3%	332.8	35.0x	28.6x
RUPALILIFE	106.4	+7.3%	212.6	NM	NM	BEXIMCO	71,930	4.2%	9.0x	1.2x	GENEXIL	101.5	+2.4%	330.9	30.7x	5.5x
LEGACYFOOT	50.8	+6.3%	5.3	NM	5.6x	RENATA	68,196	4.0%	31.1x	4.7x	SEAPEARL	313.3	+2.4%	270.3	76.0x	22.1x
FAREASTLIF	79.7	+5.1%	71.2	NM	NM	BXPHERMA	45,538	2.7%	14.1x	1.6x	ADNTEL	158.9	+3.0%	255.1	47.2x	5.6x
APEXFOOT	321.0	+4.9%	154.7	25.9x	1.4x	BEACONPHAR	45,276	2.7%	69.0x	10.5x	BPML	85.4	+3.3%	229.5	23.5x	1.1x
PRIMELIFE	56.5	+4.6%	4.4	NM	NM	GP	38,700	2.3%	12.9x	8.4x	BSC	133.6	-2.1%	217.5	8.9x	1.7x
MEGCONMILK	30.3	+4.5%	7.7	NM	NM	BRACBANK	30,976	1.8%	10.9x	1.0x	RUPALILIFE	106.4	+7.3%	212.6	NM	NM
EHL	106.3	+4.4%	377.1	16.7x	1.4x	LHBL	26,581	1.6%	16.9x	4.2x	ORIONPHARM	84.0	-0.9%	209.1	23.9x	0.9x
MEGHNALIFE	93.5	+4.4%	173.3	NM	NM	ISLAMIBANK	24,444	1.4%	11.1x	0.8x	SPCERAMICS	47.6	-2.5%	185.7	88.1x	1.5x

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)
GBBPOWER	15.1	-5.6%	13.5	16.2x	0.7x	SEAPEARL	301.1	280.1	20.0	703	200.24
RSRMSTEEL	16.7	-5.1%	2.5	NM	0x	SQURPHARMA	202.8	200.0	17.0	751	150.27
BGIC	62.6	-5.0%	7.3	39.1x	3.2x	BDFINANCE	48.0	42.8	3.0	589	26.19
KBPPWBIL	10.3	-4.6%	2.7	NM	0.9x	BEACONPHAR	305.5	300.0	5.0	73	22.29
DHAKAINS	63.3	-4.4%	13.3	19.4x	1.9x	EGEN	48.1	40.7	15.0	424	19.07
BDTHAI	13.5	-4.3%	8.2	NM	0.5x	FINEFOODS	67.0	62.0	6.0	256	16.36
ARAMITCEM	22.7	-4.2%	1.9	NM	4.6x	GP	263.0	261.6	19.0	60	15.83
SHURWID	14.2	-4.1%	3.8	NM	1.1x	BEXIMCO	110.5	104.1	6.0	135	14.21
RELIANCINS	59.2	-3.9%	3.1	10.4x	0.9x	BSCCL	199.8	199.8	9.0	65	12.99
YPL	17.4	-3.9%	7.5	NM	3.1x	AL-HAJTEX	177.0	160.2	13.0	69	11.53

* 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
SEAPEARL	301.1	280.1	200.2	703	20
SQURPHARMA	202.8	200.0	150.3	751	17
BDFINANCE	48.0	42.8	26.2	589	3
BEACONPHAR	305.5	300.0	22.3	73	5
EGEN	48.1	40.7	19.1	424	15
FINEFOODS	67.0	62.0	16.4	256	6
GP	263.0	261.6	15.8	60	19
BEXIMCO	110.5	104.1	14.2	135	6
BSCCL	199.8	199.8	13.0	65	9
AL-HAJTEX	177.0	160.2	11.5	69	13
AOL	36.5	33.0	9.0	265	3
ADNTEL	155.0	141.0	8.5	56	6
BBSCABLES	45.1	45.0	7.8	173	6
BXPHARMA	140.7	140.1	6.5	46	6
DELTASPINN	9.0	9.0	6.3	700	1
ACFL	27.0	26.0	6.0	232	2
RDFOOD	38.0	36.2	4.6	126	3
LINDEBD	1,400.0	1,310.4	4.4	3	4
MARICO	2,320.0	2,300.5	4.0	2	6
CITYBANK	21.5	21.4	3.9	180	4
NBL	8.3	8.3	3.7	450	2
MALEKSPIN	29.7	24.4	3.5	137	6
Total			605.8		220

Important DSE News
GEMINISEA

The company has informed that the Board of Directors of the company has taken decision on the following issues: "A Joint Collaboration agreement has been signed between Gemini Sea Food Ltd. (GSFL) and a German based leading Frozen Food Company with its head office located in Thailand namely "Lenk Frozen Foods (Asia) Co. Ltd (LENK)" on 5th March 2023. Under this agreement, GSFL will process the raw materials (Shrimp) sourced by the LENK to make them exportable to the specified purchases order of LENK with 100% advance payment to GSFL. Both the parties also agreed to work together to expand the businesses to find a nonconventional the global market, which to be improved the backward linkage periphery of the businesses. The export momentum of Gemini might be achieved a significant unconventional market which will increase more than 50 crore additional revenue and will reduce the cost of production along with the operating expenses to ensure a sustainable growth on future profitability of Gemini Sea Food Ltd."

HAKKANIPUL

Mohammed Golam Morshed, one of the Sponsor Directors of the company, has further informed that he has completed his sale of 1,00,000 shares of the Company at prevailing market price through Chittagong Stock Exchange (CSE) as per declaration disseminated on 23.01.2023.

Mohammed Golam Kibria, one of the Sponsor Directors of the company, has further informed that he has completed his sale of 1,00,000 shares of the Company at prevailing market price through Chittagong Stock Exchange (CSE) as per declaration disseminated on 23.01.2023.

Mohammed Golam Rasul Muktadir, one of the Sponsor Directors of the company, has further informed that he has completed his sale of 1,00,000 shares of the Company at prevailing market price through Chittagong Stock Exchange (CSE) as per declaration disseminated on 23.01.2023.

NRBCBANK

The company has informed that Mr. Mohammad Ahsan Habib has been appointed as Company Secretary of the company with effect from March 02, 2023.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
RECKITTBN		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
GREENDEL		0.0%	25%	Record Date	22-Mar-23
LHBL		0.0%	15%	Record Date	27-Mar-23

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.