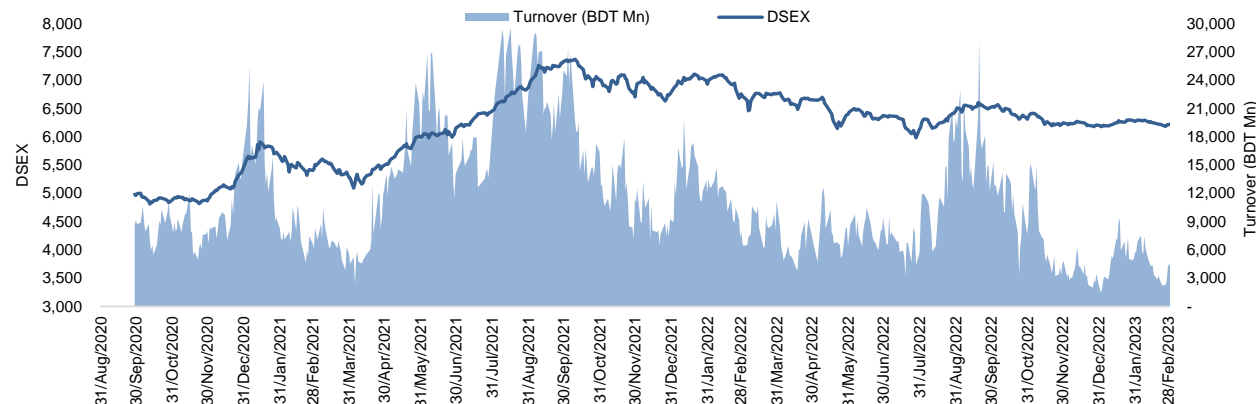


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.19%) lost 11.62 points and closed at 6,231.96. The blue-chip index DS30 (-0.26%), the Shariah-based index DSES (-0.35%), and the large-cap index CDSET (-0.22%) closed at 2,217.68, 1,355.16, and 1,214.49 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.43% followed by Fuel & Power (-0.06%), Food & Allied (-0.06%), Bank (-0.03%), Engineering (-0.01%), Telecommunication (0.00%), and NBF1 (+0.06%), respectively. Block trades contributed 25.1% of the overall market turnover. Rupali Life Insurance Company Limited (+6.8%) was the most traded share with a turnover of BDT 364 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,231.96	6,243.57	-11.62	-0.19%	+0.4%
DS30	2,217.68	2,223.49	-5.82	-0.26%	+1.0%
DSES	1,355.16	1,359.86	-4.70	-0.35%	-0.3%
CDSET	1,214.49	1,217.20	-2.71	-0.22%	+0.0%

	Advanced	Declined	Unchanged	Total
All Category	31	104	202	337
A Category (Equity)	18	76	134	228
B Category (Equity)	11	19	62	92
N Category (Equity)	1	1	2	4
Z Category (Equity)	1	8	4	13
Mutual Funds	0	0	22	22
Corporate Bonds	1	0	2	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,624,890	7,636,215	-0.1%
	Mn USD	72,463	72,570	
Turnover	Mn BDT	5,636	4,517	+24.8%
	Mn USD	54	43	
Volume	Mn Shares	82	71	+14.9%
	No. of Trade	99,180	94,704	+4.7%

\* Average Interbank Exchange Rate is BDT 105.23 as of Mar 13, 2023

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Figure: Sectorial Turnover (BDT Mn)

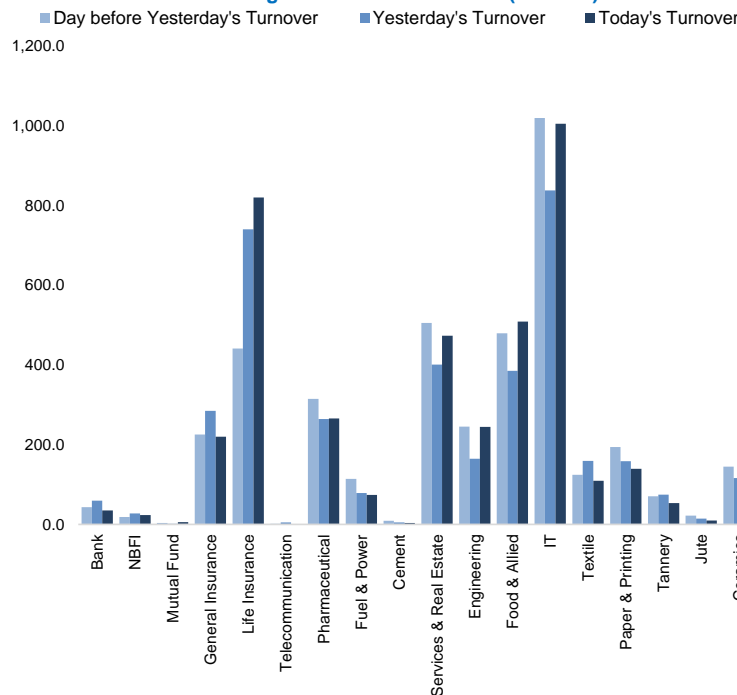
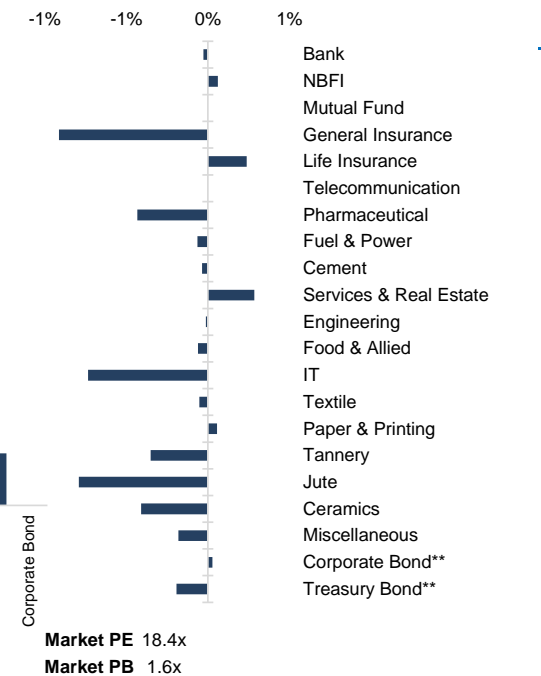


Figure: Sectorial Mcap Change



Market PE 18.4x

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	1,433	-0.40	-0.03%	34	669,161	8.9%	35.0	0.8%	7.8x	0.7x	GP	386,996	8.6%	0.1	12.9x	8.4x
NBFI	1,918	1,917	+1.18	+0.06%	23	187,129	2.5%	23.4	0.6%	NM	4.4x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	827	827	-	-	37	37,398	0.5%	5.5	0.1%	NM	0.7x	BATBC	280,098	6.2%	0.1	15.7x	6.8x
General Insurance	3,139	3,168	-28.93	-0.91%	42	91,614	1.2%	220.0	5.2%	15.4x	1.5x	SQURPHARMA	185,977	4.1%	1.0	9.7x	1.8x
Life Insurance	2,671	2,664	+6.35	+0.24%	14	74,902	1.0%	819.5	19.4%	NM	NM	ROBI	157,138	3.5%	0.0	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%	0.0	31.1x	4.7x
Pharmaceutical	3,695	3,711	-16.04	-0.43%	34	716,791	9.5%	265.7	6.3%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,694	1,695	-1.09	-0.06%	23	446,850	5.9%	74.2	1.8%	17.9x	1.1x	BEXIMCO	103,571	2.3%	0.0	9.0x	1.2x
Cement	2,309	2,310	-0.81	-0.04%	7	110,922	1.5%	3.3	0.1%	57.9x	2.6x	BERGERPBL	80,345	1.8%	2.6	27.2x	6.7x
Services & Real Esta	2,277	2,271	+6.49	+0.29%	8	89,967	1.2%	473.4	11.2%	38.2x	1.2x	MARICO	76,277	1.7%	2.7	20.7x	28.6x
Engineering	4,484	4,484	-0.54	-0.01%	42	526,230	7.0%	244.7	5.8%	56.2x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,703	21,716	-13.03	-0.06%	21	386,710	5.1%	508.5	12.0%	20.0x	8.1x	BXPHERMA	65,222	1.5%	0.6	14.1x	1.6x
IT	3,413	3,438	-25.27	-0.74%	11	44,490	0.6%	1,004.8	23.8%	32.4x	3.1x	BEACONPHAR	62,855	1.4%	21.0	67.0x	10.2x
Textile	1,581	1,581	-0.83	-0.05%	58	166,583	2.2%	109.4	2.6%	42.7x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,573	10,567	+5.94	+0.06%	6	40,737	0.5%	139.7	3.3%	40.2x	2.0x	ISLAMIBANK	53,613	1.2%	2.6	10.9x	0.8x
Tannery	3,093	3,104	-10.90	-0.35%	6	32,667	0.4%	53.3	1.3%	47.3x	3.1x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	12,430	12,529	-99.06	-0.79%	3	3,041	0.0%	9.6	0.2%	NM	4.8x	TITASGAR	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	689	692	-2.83	-0.41%	5	31,866	0.4%	99.7	2.4%	41.3x	1.9x	UNILEVERCL	38,523	0.9%	25.9	52.7x	22.9x
Miscellaneous	4,084	4,091	-7.37	-0.18%	14	222,350	2.9%	130.3	3.1%	13.2x	1.8x	SEAPEARL	37,734	0.8%	252.3	75.8x	22.1x
Corporate Bond**	88	88	+0.02	+0.03%	9	36,405	0.5%	0.6	0.0%	NM	NM	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Treasury Bond**	95	96	-0.18	-0.19%	252	3,051,456	40.4%	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
UNIONCAP	8.8	+10.0%	13.1	NM	NM	SQURPHARMA	121,685	7.2%	9.7x	1.8x	RUPALILIFE	118.6	+6.8%	363.8	NM	NM
RUPALILIFE	118.6	+6.8%	363.8	NM	NM	BATBC	74,086	4.4%	15.7x	6.8x	AAMRANET	65.9	+4.8%	296.6	20.7x	1.7x
AAMRANET	65.9	+4.8%	296.6	20.7x	1.7x	BEXIMCO	71,930	4.3%	9.0x	1.2x	SEAPEARL	312.5	+0.3%	252.3	75.8x	22.1x
RDFOOD	40.7	+4.6%	121.1	35.3x	2.6x	RENATA	68,196	4.0%	31.1x	4.7x	ADNTEL	155.7	-3.6%	237.8	46.2x	5.4x
NFML	14.5	+4.3%	8.6	90.5x	1.2x	BXPHERMA	45,538	2.7%	14.1x	1.6x	GENXIL	96.8	-0.7%	218.9	29.3x	5.2x
BENGALWTL	41.8	+3.7%	94.0	78.9x	1.6x	BEACONPHAR	43,999	2.6%	67.0x	10.2x	MEGHNALIFE	94.2	+2.2%	198.5	NM	NM
IMAMBUTTON	90.1	+3.2%	21.9	NM	19x	GP	38,700	2.3%	12.9x	8.4x	OLYMPIC	150.9	+1.5%	152.9	19.6x	3.2x
ICICL	31.8	+2.9%	13.7	35.2x	2.0x	BRACBANK	30,976	1.8%	10.9x	1.0x	BDCOM	44.7	-3.5%	138.0	31.4x	2.9x
OIMEX	17.4	+2.4%	11.9	NM	1.6x	LHBL	26,581	1.6%	16.9x	4.2x	RDFOOD	40.7	+4.6%	121.1	35.3x	2.6x
SONALILIFE	68.1	+2.3%	54.6	NM	NM	ISLAMIBANK	24,083	1.4%	10.9x	0.8x	EHL	96.6	-1.0%	112.6	15.2x	1.3x
						SEAPEARL	20,063	1.2%	75.8x	22.1x						
						NBL	19,116	1.1%	NM	0.6x						
						PUBALIBANK	18,525	1.1%	5.5x	0.6x						
						OLYMPIC	18,302	1.1%	19.6x	3.2x						
						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	13,945	0.8%	6.6x	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)
MONNOAGML	956.0	-4.4%	34.9	NM	5.5x						BXPHERMA	135.0	135.0	1.0	3,500	472.50
RENWICKJA	750.1	-4.2%	3.7	NM	NM						BEXGSUKUK	85.0	85.0	1.0	5,500	467.50
BEACONPHAR	272.1	-4.1%	21.0	67.0x	10.2x						ISLAMIBANK	35.5	35.5	3.0	2,521	89.50
METROSPIN	37.1	-3.9%	9.0	38.0x	1.8x						SEAPEARL	317.0	296.0	14.0	240	73.61
LEGACYFOOT	45.9	-3.8%	1.8	NM	5.1x						BEACONPHAR	308.1	283.3	3.0	122	37.30
ADNTEL	155.7	-3.6%	237.8	46.2x	5.4x						SUNLIFEINS	47.7	47.7	1.0	625	29.81
UNITEDINS	37.9	-3.6%	1.1	44.6x	1.2x						AL-HAJTEX	179.1	170.0	17.0	165	28.61
BDCOM	44.7	-3.5%	138.0	31.4x	2.9x						SALVOCHEM	61.9	60.7	3.0	350	21.48
BDWELDING	26.6	-3.3%	4.2	NM	2.3x						FORTUNE	74.9	69.5	2.0	249	17.57
CITYGENINS	33.7	-3.2%	28.6	15.0x	1.8x						ANWARGALV	213.0	213.0	1.0	70	14.91

\* 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
BXPHERMA	135.0	135.0	472.5	3,500	1
BEXGSUKUK	85.0	85.0	467.5	5,500	1
ISLAMIBANK	35.5	35.5	89.5	2,521	3
SEAPEARL	317.0	296.0	73.6	240	14
BEACONPHAR	308.1	283.3	37.3	122	3
SUNLIFEINS	47.7	47.7	29.8	625	1
AL-HAJTEX	179.1	170.0	28.6	165	17
SALVOCHEM	61.9	60.7	21.5	350	3
FORTUNE	74.9	69.5	17.6	249	2
ANWARGALV	213.0	213.0	14.9	70	1
SQURPHARMA	204.0	201.0	14.1	70	22
GENEXIL	100.5	100.3	12.7	127	2
ADNTEL	160.0	155.0	12.1	76	3
BSCCL	218.9	199.8	11.7	58	5
BENGALWTL	41.0	38.5	11.2	286	5
METROSPIN	41.0	38.5	8.8	221	3
ROBI	29.9	27.0	8.4	311	10
MARICO	2,349.0	2,300.5	8.3	4	12
ACFL	25.9	25.9	6.7	259	1
RUPALILIFE	107.0	100.6	6.2	60	3
PTL	71.4	69.3	5.2	75	9
HRTEX	112.0	104.9	5.1	47	3
<b>Total</b>			<b>1,415.4</b>		<b>186</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
IPDC		0.0%	10%	Record Date	21-Mar-23
FUWANGFOOD		0.0%	1%	Record Date	21-Mar-23
GREENDELTA		0.0%	25%	Record Date	22-Mar-23
LHBL		0.0%	15%	Record Date	27-Mar-23
LINDEBD		0.0%	420%	Record Date	2-Apr-23
UNILEVERCL		60.0%	240%	Record Date	3-Apr-23
BDFINANCE		0.0%	10%	Record Date	4-Apr-23

**Important DSE News**
**BDFINANCE**

The Board of Directors has recommended 10% cash dividend for the year ended December 31, 2022. Date of AGM: 30.04.2023, Time: 11:00 AM, Venue: Digital Platform; Record Date: 04.04.2023. The Company has also reported Consolidated EPS of Tk. 1.25, Consolidated NAV per share of Tk. 17.41 and Consolidated NOCFPS of Tk. 0.66 for the year ended December 31, 2022 as against Tk. 1.36, Tk. 16.72 and Tk. 6.21 respectively for the year ended December 31, 2021.

**SEAPEARL**

The Board of Directors of the company has approved the investment in shares of Shamim Enterprise (Pvt.) Ltd. (SEPL). The company will acquire 30% shares of SEPL (33,908,160 shares @ TK. 10 at par) subject to approval of shareholders in Extraordinary General Meeting.

**UNIQUEHRL**

The company has informed that Unique Meghnaghat Power Limited [A Joint venture entity of Unique Hotel & Resorts PLC, Strategic Finance Limited (SFL), Nebras Power Investment Management B.V. (Nebras) and GE Capital Global Energy Investment B.V. (GE)] has signed an agreement for foreign loan of USD 463 million with lenders for a period of 15 years to meet the debt requirement of the project.

**TOSRIFA**

Northern Corporation Limited, one of the Corporate Directors of the Company, has further informed that it has completed its sale of 11,16,288 shares of the Company (7,45,000 shares in the Public Market and 3,71,288 shares in the Block Market) at prevailing market price through Dhaka Stock Exchange Ltd. as per declaration disseminated on 30.01.2023.

**PHPMF1**

PHP Power Generation Plant Ltd., one of the Sponsors of the Fund has further informed that they have completed the transfer of total 28,923,138 units of the Fund to the new Sponsor 'PHP NOF Continuous Galvanizing Mills Limited' through outside the trading system of the exchange other than by way of gift as per declaration disseminated on 02.03.2023.

**INTRACO**

Intraco Natural Gas Station Ltd., a Placement holder of the Company (where Mr. Mohammed Riyadh Ali is the Managing Director of Intraco Natural Gas Station Ltd. as well as Managing Director of Intraco Refueling Station Limited) has expressed its intention to sell 29,58,902 shares out of its total holding of 31,95,614 shares of the Company at prevailing market price (14,58,902 shares in the Public Market and 15,00,000 shares in the Block Market) through Dhaka Stock Exchange Ltd.

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