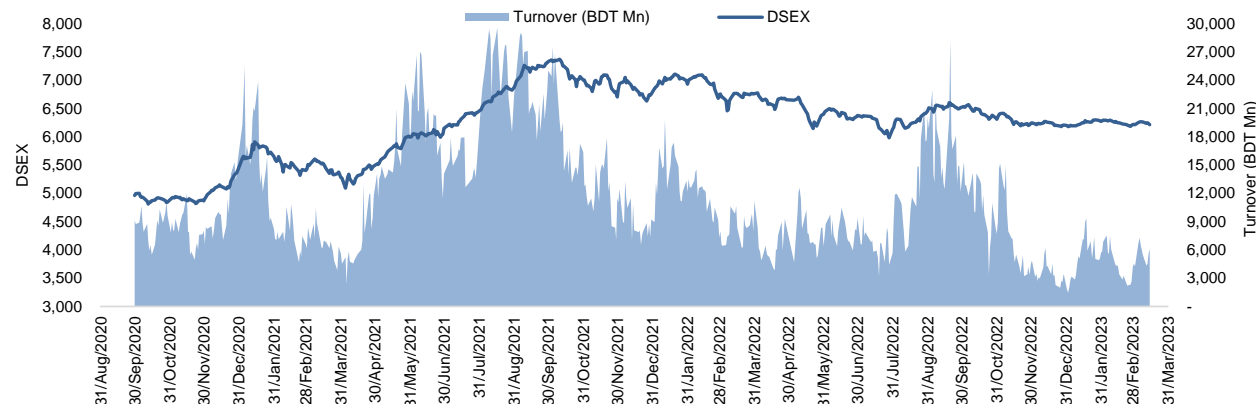


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.30%) lost 18.58 points and closed at 6,213.37. The blue-chip index DS30 (-0.11%), the Shariah-based index DSES (-0.11%), and the large-cap index CDSET (+0.08%) closed at 2,215.18, 1,353.72, and 1,215.49 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.09% followed by Bank (+0.02%), Telecommunication (0.00%). Fuel & Power experienced the highest loss of 0.13% followed by Pharmaceutical (-0.13%), NBF1 (-0.06%), Engineering (-0.06%). Block trades contributed 21.8% of the overall market turnover. Meghna Life Insurance Co. Ltd. (-3.8%) was the most traded share with a turnover of BDT 503 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,213.37	6,231.96	-18.58	-0.30%	+0.1%
DS30	2,215.18	2,217.68	-2.50	-0.11%	+0.9%
DSES	1,353.72	1,355.16	-1.44	-0.11%	-0.4%
CDSET	1,215.49	1,214.49	+1.00	+0.08%	+0.1%

	Advanced	Declined	Unchanged	Total
All Category	21	113	176	310
A Category (Equity)	15	76	120	211
B Category (Equity)	5	26	52	83
N Category (Equity)	1	1	2	4
Z Category (Equity)	0	10	2	12
Mutual Funds	0	0	15	15
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,616,846	7,624,890	-0.1%
	Mn USD	71,637	71,713	
Turnover	Mn BDT	6,072	5,636	+7.7%
	Mn USD	57	53	
Volume	Mn Shares	84	82	+3.4%
	No. of Trade	109,407	99,180	+10.3%

\* Average Interbank Exchange Rate is BDT 106.33 as of Mar 14, 2023

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Figure: Sectorial Turnover (BDT Mn)

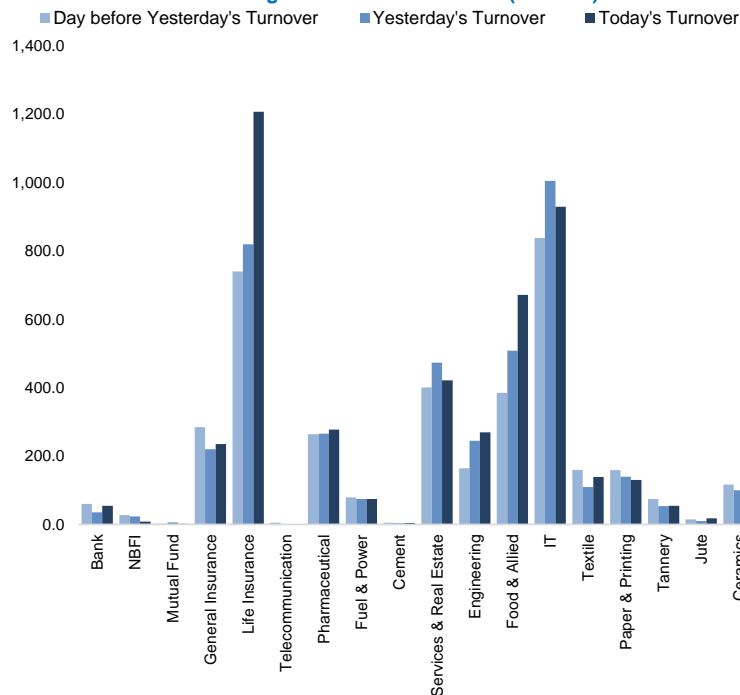
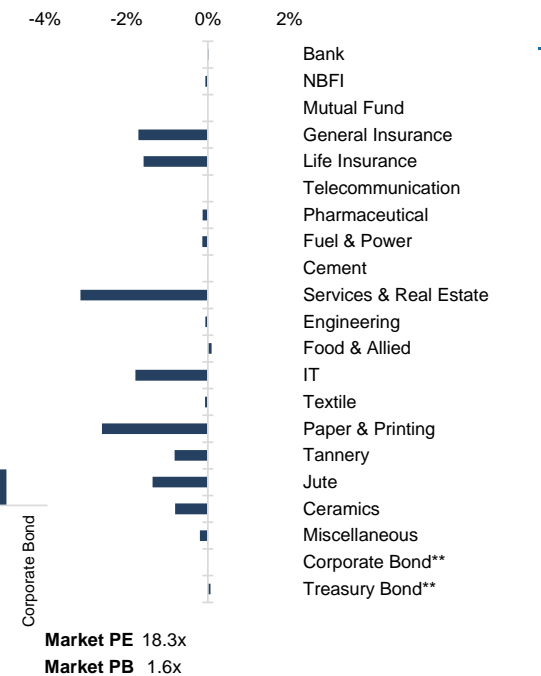


Figure: Sectorial Mcap Change



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	1,433	+0.29	+0.02%	34	669,298	8.9%	54.4	1.1%	7.8x	0.7x	GP	386,996	8.6%	0.5	12.9x	8.4x
NBFI	1,917	1,918	-1.24	-0.06%	23	187,009	2.5%	8.0	0.2%	NM	4.4x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	827	827	-	-	37	37,398	0.5%	1.7	0.0%	NM	0.7x	BATBC	280,098	6.3%	0.3	15.7x	6.8x
General Insurance	3,086	3,139	-53.42	-1.70%	42	90,055	1.2%	235.2	5.0%	15.2x	1.5x	SQURPHARMA	185,977	4.1%	1.3	9.7x	1.8x
Life Insurance	2,629	2,671	-42.04	-1.57%	14	73,723	1.0%	1,207.3	25.4%	NM	NM	ROBI	157,138	3.5%	0.0	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.5	0.0%	16.8x	4.7x	RENATA	139,689	3.1%	0.2	31.1x	4.7x
Pharmaceutical	3,690	3,695	-4.81	-0.13%	34	715,858	9.5%	277.1	5.8%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,692	1,694	-2.26	-0.13%	23	446,254	5.9%	74.4	1.6%	17.9x	1.1x	BEXIMCO	103,571	2.3%	0.0	9.0x	1.2x
Cement	2,309	2,309	-0.38	-0.02%	7	110,904	1.5%	4.1	0.1%	57.9x	2.6x	BERGERPBL	80,359	1.8%	1.7	27.2x	6.7x
Services & Real Esta	2,206	2,277	-71.16	-3.12%	8	87,156	1.2%	421.7	8.9%	37.0x	1.1x	MARICO	76,277	1.7%	3.5	20.7x	28.6x
Engineering	4,481	4,484	-2.71	-0.06%	42	525,912	7.0%	269.0	5.7%	56.2x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,723	21,703	+19.96	+0.09%	21	387,065	5.1%	671.2	14.1%	20.1x	8.1x	BXPHERMA	65,222	1.5%	0.9	14.1x	1.6x
IT	3,352	3,413	-60.54	-1.77%	11	43,701	0.6%	929.1	19.6%	31.8x	3.0x	BEACONPHAR	62,948	1.4%	13.5	67.1x	10.2x
Textile	1,580	1,581	-1.10	-0.07%	58	166,466	2.2%	139.2	2.9%	42.7x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,298	10,573	-274.95	-2.60%	6	39,678	0.5%	130.3	2.7%	39.2x	2.0x	ISLAMIBANK	53,774	1.2%	4.3	11.0x	0.8x
Tannery	3,068	3,093	-25.24	-0.82%	6	32,401	0.4%	54.5	1.1%	46.9x	3.1x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	12,261	12,430	-168.97	-1.36%	3	2,999	0.0%	17.8	0.4%	NM	4.7x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	683	689	-5.53	-0.80%	5	31,611	0.4%	149.7	3.2%	40.9x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,076	4,084	-7.92	-0.19%	14	221,919	2.9%	105.5	2.2%	13.1x	1.8x	UNILEVERCL	37,236	0.8%	18.1	51.0x	22.1x
Corporate Bond**	88	88	-	-	9	36,405	0.5%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	10.7x	0.9x
Treasury Bond**	96	95	+0.06	+0.06%	252	3,053,349	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
OLYMPIC	160.5	+6.4%	404.9	20.9x	3.4x	SQURPHARMA	121,685	7.2%	9.7x	1.8x	MEGHNALIFE	90.6	-3.8%	502.8	NM	NM
AL-HAJTEX	189.8	+3.4%	78.2	NM	20.0x	BATBC	74,086	4.4%	15.7x	6.8x	OLYMPIC	160.5	+6.4%	404.9	20.9x	3.4x
PADMALIFE	43.4	+1.9%	14.8	NM	NM	BEXIMCO	71,930	4.3%	9.0x	1.2x	RUPALILIFE	110.4	-6.9%	305.8	NM	NM
CLICL	63.5	+1.8%	59.5	NM	NM	RENATA	68,196	4.0%	31.1x	4.7x	ADNTEL	158.1	+1.5%	282.5	46.9x	5.5x
ADNTEL	158.1	+1.5%	282.5	46.9x	5.5x	BXPHERMA	45,538	2.7%	14.1x	1.6x	AAMRANET	63.2	-4.1%	217.3	19.8x	1.7x
SONALILIFE	68.9	+1.2%	116.1	NM	NM	BEACONPHAR	44,063	2.6%	67.1x	10.2x	GENEXIL	93.4	-3.5%	209.1	28.2x	5.0x
RDFOOD	41.1	+1.0%	94.5	35.7x	3x	GP	38,700	2.3%	12.9x	8.4x	SEAPEARL	295.5	-5.4%	203.7	71.7x	20.9x
PREMIERBAN	13.5	+0.7%	12.4	4.1x	0.6x	BRACBANK	30,976	1.8%	10.9x	1.0x	BDCOM	42.9	-4.0%	139.0	30.1x	2.8x
OIMEX	17.5	+0.6%	20.6	NM	1.6x	LHBL	26,581	1.6%	16.9x	4.2x	SONALILIFE	68.9	+1.2%	116.1	NM	NM
NAVANACNG	22.9	+0.4%	3.5	NM	0.7x	ISLAMIBANK	24,155	1.4%	11.0x	0.8x	BENGALWTL	40.9	-2.2%	110.1	77.2x	1.6x

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)
METROSPIN	33.4	-10.0%	29.5	34.2x	1.6x	BEXGSUKUK	85.0	85.0	1.0	5,600	476.00
BGIC	53.5	-9.5%	4.0	33.4x	3x	BXPHERMA	144.0	135.0	4.0	3,515	474.63
UNIONCAP	8.1	-8.0%	5.6	NM	NM	AL-HAJTEX	189.0	170.0	39.0	558	98.91
MONNOAGML	884.6	-7.5%	52.4	NM	5.1x	BSRMLTD	90.0	90.0	1.0	554	49.86
SKICL	48.4	-7.3%	27.2	16.9x	2.4x	BEXIMCO	126.0	104.1	6.0	289	35.89
RUPALILIFE	110.4	-6.9%	305.8	NM	NM	BARKAPOWER	19.2	19.2	1.0	1,326	25.45
MEGHNAPET	33.5	-6.2%	3.4	NM	NM	INTRACO	31.5	31.5	2.0	620	19.53
SEAPEARL	295.5	-5.4%	203.7	71.7x	20.9x	BSCCL	199.8	199.8	8.0	66	13.19
ZEALBANGLA	139.1	-5.4%	1.6	NM	NM	ADNTEL	164.1	147.0	5.0	80	12.04
MEGCONMILK	28.6	-5.3%	6.5	NM	NM	MARICO	2,320.0	2,315.0	3.0	5	11.59

\* 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
BEXGSUKUK	85.0	85.0	476.0	5,600	1
BXPHERMA	144.0	135.0	474.6	3,515	4
AL-HAJTEX	189.0	170.0	98.9	558	39
BSRMLTD	90.0	90.0	49.9	554	1
BEXIMCO	126.0	104.1	35.9	289	6
BARKAPOWER	19.2	19.2	25.5	1,326	1
INTRACO	31.5	31.5	19.5	620	2
BSCCL	199.8	199.8	13.2	66	8
ADNTEL	164.1	147.0	12.0	80	5
MARICO	2,320.0	2,315.0	11.6	5	3
HRTEX	106.0	104.5	9.9	94	9
MEGHNALIFE	93.5	93.5	7.9	85	2
SQURPHARMA	203.8	201.0	7.3	36	12
LHBL	63.7	63.2	6.1	96	9
IFIC	11.6	11.5	5.5	480	2
GP	286.6	261.6	4.8	18	7
BDCOM	43.0	43.0	4.3	100	1
PTL	71.0	69.3	4.3	61	6
RAKCERAMIC	39.0	39.0	3.9	100	1
MONOSPOOL	251.9	251.0	3.8	15	2
DELTALIFE	150.0	150.0	3.8	25	1
METROSPIN	40.3	36.0	3.2	87	3
<b>Total</b>			<b>1,320.7</b>		<b>175</b>

**Important DSE News**
**SKICL**

The Board of Directors has recommended 12% Cash dividend for the year ended December 31, 2022. Date of AGM: 09.05.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 09.04.2023. The Company has also reported EPS of Tk. 2.86, NAV per share of Tk. 20.17 and NOCFPS of Tk. 4.45 for the year ended December 31, 2022 as against Tk. 3.83, Tk. 26.99 and Tk. 8.89 respectively for the same period of the previous year.

**NITOLINS**

The company has informed that the Board of Directors has decided to purchase a land of 10 Katha (16.50 decimals) situated at Plot No.-122, Road No.-103, Sector-03, Jote No. 2317 of Purbachal New Town, Rupganj, Narayanganj, at a total cost of Tk. 20.70 Crore (approximately) excluding the cost of registration, VAT, AIT and other admissible cost, subject to approval of Insurance Development and Regulatory Authority (IDRA).

**AFTABAUTO**

The company has informed that the Board of Directors has appointed Mr. Rahat Mahmud as Company Secretary of the company with immediate effect.

**CLICL**

The company has informed that Mr. Zahrul Syed Bakht, FCMA has resigned from his position of Independent Director of the company with effect from March 11, 2023.

**ACI**

ACI Foundation, one of the Sponsor Directors of the Company, has expressed its intention to buy 1,35,000 shares of the company at prevailing market price (1,04,000 shares in the Block Market and 31,000 shares in the Public Market) through Dhaka Stock Exchange Ltd. within next 30 working days.

**ADNTEL**

Mamonoor Rashid, one of the Sponsors of the company, has expressed his intention to transfer 2,00,000 shares out of his total holding of 15,05,000 shares of the company to his Spouse Fahima Jishan Chowdhury (General Shareholder of the company), by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of approval letter by DSE.

**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
GRENDEL		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
SKICL		2.0%	12%	Record Date	9-Apr-23

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