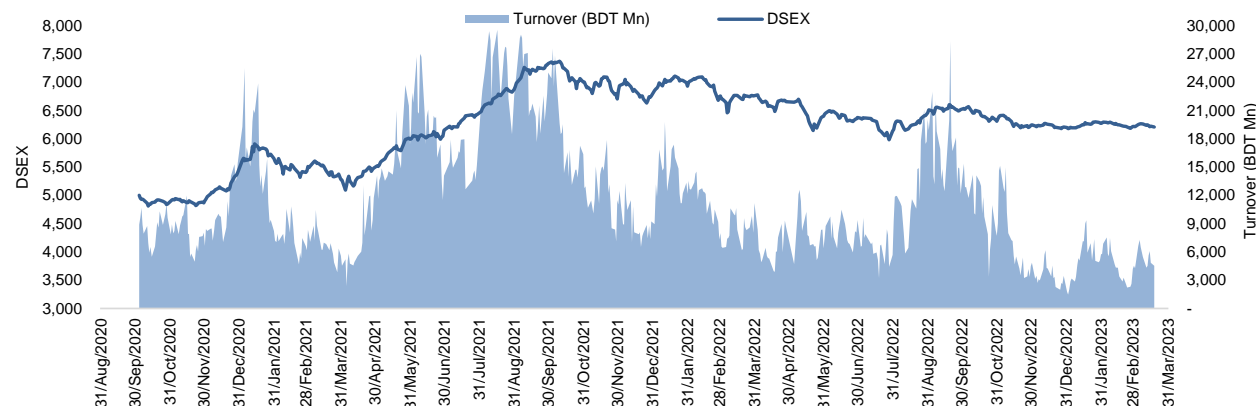


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.21%) lost 12.91 points and closed at 6,207.33. The blue-chip index DS30 (-0.04%), the Shariah-based index DSES (-0.29%), and the large-cap index CDSET (-0.01%) closed at 2,217.78, 1,352.89, and 1,216.58 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.27% followed by Bank (+0.08%), Telecommunication (0.00%). Pharmaceutical experienced the highest loss of 0.21% followed by Engineering (-0.06%), Fuel & Power (-0.05%), NBFi (-0.02%). Block trades contributed 30.9% of the overall market turnover. Rupali Life Insurance Company Limited (-9.3%) was the most traded share with a turnover of BDT 299 million.



| Index | Closing  | Opening  | Point Δ | %Δ     | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX  | 6,207.33 | 6,220.24 | -12.91  | -0.21% | +0.0%  |
| DS30  | 2,217.78 | 2,218.76 | -0.97   | -0.04% | +1.0%  |
| DSES  | 1,352.89 | 1,356.85 | -3.96   | -0.29% | -0.4%  |
| CDSET | 1,216.58 | 1,216.66 | -0.08   | -0.01% | +0.2%  |

|                     | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category        | 19       | 88       | 213       | 320   |
| A Category (Equity) | 13       | 61       | 149       | 223   |
| B Category (Equity) | 3        | 20       | 59        | 82    |
| N Category (Equity) | 0        | 2        | 2         | 4     |
| Z Category (Equity) | 3        | 5        | 3         | 11    |
| Mutual Funds        | 0        | 2        | 16        | 18    |
| Corporate Bonds     | 0        | 0        | 2         | 2     |
| Treasury Bonds      | 0        | 0        | 0         | 0     |

\* Based on Traded Scripts

|              | Today     | Last Day  | Daily %Δ  |       |
|--------------|-----------|-----------|-----------|-------|
| Mcap         | Mn BDT    | 7,613,029 | 7,618,947 | -0.1% |
|              | Mn USD    | 71,150    | 71,205    |       |
| Turnover     | Mn BDT    | 4,523     | 4,840     | -6.6% |
|              | Mn USD    | 42        | 45        |       |
| Volume       | Mn Shares | 61        | 64        | -3.8% |
|              |           |           |           |       |
| No. of Trade | 79,333    | 78,958    | +0.5%     |       |

\* Average Interbank Exchange Rate is BDT 107.00 as of Mar 16, 2023

|   |  |
|---|--|
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|---|--|

Figure: Sectorial Turnover (BDT Mn)

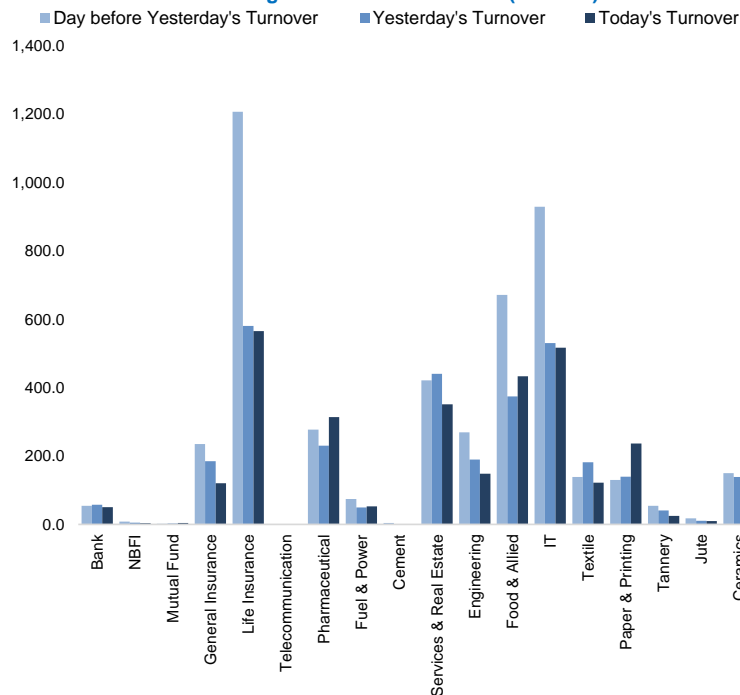
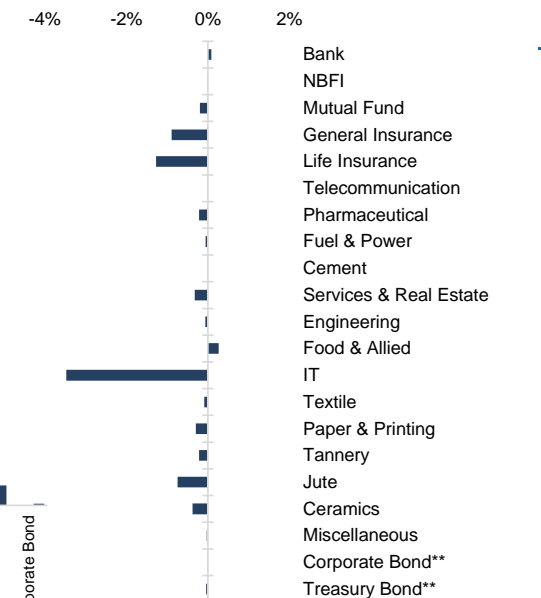


Figure: Sectorial Mcap Change



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                 | 1,434   | 1,433   | +1.21    | +0.08% | 34               | 669,779       | 8.9%            | 50.4              | 1.6%                | 7.8x  | 0.7x | GP                    | 386,996       | 8.6%            | 0.4               | 12.9x | 8.4x  |
| NBFI                 | 1,917   | 1,917   | -0.35    | -0.02% | 23               | 186,974       | 2.5%            | 3.2               | 0.1%                | NM    | 4.4x | WALTONHIL             | 317,378       | 7.1%            | 0.0               | 40.4x | 4.8x  |
| Mutual Fund          | 825     | 827     | -1.62    | -0.20% | 37               | 37,318        | 0.5%            | 4.0               | 0.1%                | NM    | 0.7x | BATBC                 | 280,098       | 6.3%            | 0.1               | 15.7x | 6.8x  |
| General Insurance    | 3,057   | 3,084   | -27.42   | -0.89% | 42               | 89,211        | 1.2%            | 120.7             | 3.9%                | 15.0x | 1.4x | SQURPHARM/            | 185,977       | 4.2%            | 0.5               | 9.7x  | 1.8x  |
| Life Insurance       | 2,542   | 2,574   | -32.65   | -1.27% | 14               | 71,282        | 0.9%            | 565.1             | 18.1%               | NM    | NM   | ROBI                  | 157,138       | 3.5%            | 0.0               | 85.7x | 2.4x  |
| Telecommunication    | 4,946   | 4,946   | -        | -      | 3                | 580,232       | 7.7%            | 0.4               | 0.0%                | 16.8x | 4.7x | RENATA                | 139,689       | 3.1%            | 0.1               | 31.1x | 4.7x  |
| Pharmaceutical       | 3,691   | 3,699   | -7.84    | -0.21% | 34               | 715,996       | 9.5%            | 314.1             | 10.0%               | 18.5x | 2.4x | UPGDCL                | 135,475       | 3.0%            | 0.0               | 15.4x | 4.7x  |
| Fuel & Power         | 1,693   | 1,694   | -0.92    | -0.05% | 23               | 446,521       | 5.9%            | 52.5              | 1.7%                | 17.9x | 1.1x | BEXIMCO               | 103,571       | 2.3%            | 0.1               | 9.0x  | 1.2x  |
| Cement               | 2,309   | 2,309   | -0.06    | -0.00% | 7                | 110,898       | 1.5%            | 0.5               | 0.0%                | 57.9x | 2.6x | BERGERPBL             | 80,359        | 1.8%            | 0.6               | 27.2x | 6.7x  |
| Services & Real Esta | 2,242   | 2,249   | -7.25    | -0.32% | 8                | 88,585        | 1.2%            | 351.6             | 11.3%               | 37.6x | 1.2x | MARICO                | 76,277        | 1.7%            | 5.1               | 20.7x | 28.6x |
| Engineering          | 4,478   | 4,481   | -2.75    | -0.06% | 42               | 525,546       | 7.0%            | 148.5             | 4.8%                | 56.1x | 2.1x | ICB                   | 74,119        | 1.7%            | 0.0               | NM    | 1.7x  |
| Food & Allied        | 21,681  | 21,623  | +58.03   | +0.27% | 21               | 386,326       | 5.1%            | 433.4             | 13.9%               | 20.0x | 8.1x | BXPHERMA              | 65,222        | 1.5%            | 2.1               | 14.1x | 1.6x  |
| IT                   | 3,260   | 3,377   | -117.31  | -3.47% | 11               | 42,503        | 0.6%            | 517.1             | 16.5%               | 31.0x | 2.9x | BEACONPHAR            | 64,218        | 1.4%            | 26.5              | 68.5x | 10.4x |
| Textile              | 1,580   | 1,581   | -1.35    | -0.09% | 58               | 166,466       | 2.2%            | 121.9             | 3.9%                | 42.7x | 1.0x | BRACBANK              | 57,619        | 1.3%            | 0.4               | 10.9x | 1.0x  |
| Paper & Printing     | 10,583  | 10,614  | -31.22   | -0.29% | 6                | 40,775        | 0.5%            | 236.4             | 7.6%                | 40.2x | 2.0x | ISLAMIBANK            | 53,774        | 1.2%            | 5.5               | 11.0x | 0.8x  |
| Tannery              | 3,064   | 3,070   | -6.68    | -0.22% | 6                | 32,358        | 0.4%            | 25.1              | 0.8%                | 46.9x | 3.1x | DUTCHBANGL            | 43,554        | 1.0%            | 0.0               | 7.4x  | 1.1x  |
| Jute                 | 12,188  | 12,279  | -91.40   | -0.74% | 3                | 2,982         | 0.0%            | 10.1              | 0.3%                | NM    | 4.7x | TITASGAS              | 40,459        | 0.9%            | 0.1               | 13.2x | 0.5x  |
| Ceramics             | 686     | 688     | -2.58    | -0.37% | 5                | 31,721        | 0.4%            | 106.9             | 3.4%                | 41.1x | 1.9x | SEAPEARL              | 37,759        | 0.8%            | 188.3             | 75.9x | 22.1x |
| Miscellaneous        | 4,074   | 4,075   | -1.03    | -0.03% | 14               | 221,804       | 2.9%            | 58.2              | 1.9%                | 13.1x | 1.8x | POWERGRID             | 37,347        | 0.8%            | 0.0               | NM    | 0.4x  |
| Corporate Bond**     | 88      | 88      | -        | -      | 9                | 36,405        | 0.5%            | 5.2               | 0.2%                | NM    | NM   | UNILEVERCL            | 37,277        | 0.8%            | 10.1              | 51.0x | 22.2x |
| Treasury Bond**      | 95      | 96      | -0.04    | -0.04% | 252              | 3,051,847     | 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                       |
|-----------------|-------------------|-------|-------------------|-------|-------|----------------------------|--------------------------|----------------------------|-------|-------|--------------------|----------------------------|----------------------------|---------------------|------------------------|--------------------------|
| RDFOOD          | 42.6              | +4.2% | 146.8             | 37.0x | 2.7x  | SQURPHARMA                 | 121,685                  | 7.2%                       | 9.7x  | 1.8x  | RUPALILIFE         | 96.2                       | -9.3%                      | 299.3               | NM                     | NM                       |
| UNILEVERCL      | 3,094.4           | +3.6% | 10.1              | 51.0x | 22.2x | BATBC                      | 74,086                   | 4.4%                       | 15.7x | 6.8x  | SEAPEARL           | 312.7                      | +1.5%                      | 188.3               | 75.9x                  | 22.1x                    |
| MEGHNA PET      | 33.1              | +3.1% | 2.1               | NM    | NM    | BEXIMCO                    | 71,930                   | 4.3%                       | 9.0x  | 1.2x  | SONALIPAPR         | 669.3                      | +1.1%                      | 153.3               | 71.6x                  | 3.9x                     |
| FINEFOODS       | 68.0              | +2.9% | 44.3              | NM    | 6.5x  | RENATA                     | 68,196                   | 4.1%                       | 31.1x | 4.7x  | RDFOOD             | 42.6                       | +4.2%                      | 146.8               | 37.0x                  | 2.7x                     |
| ZEALBANGLA      | 139.3             | +2.8% | 0.9               | NM    | NM    | BXPHERMA                   | 45,538                   | 2.7%                       | 14.1x | 1.6x  | ORIONPHARM         | 79.7                       | -0.9%                      | 132.3               | 22.7x                  | 0.9x                     |
| BANKASIA        | 20.7              | +2.5% | 3.3               | 7.9x  | 0.8x  | BEACONPHAR                 | 44,953                   | 2.7%                       | 68.5x | 10.4x | ADNTEL             | 153.1                      | -5.4%                      | 130.0               | 45.4x                  | 5.4x                     |
| GEMINISEA       | 460.9             | +2.4% | 102.0             | 32.9x | 27x   | GP                         | 38,700                   | 2.3%                       | 12.9x | 8.4x  | MEGHNALIFE         | 77.7                       | -8.9%                      | 128.8               | NM                     | NM                       |
| DELTALIFE       | 143.8             | +2.2% | 46.2              | NM    | NM    | BRACBANK                   | 30,976                   | 1.8%                       | 10.9x | 1.0x  | GENEXIL            | 91.0                       | -3.7%                      | 124.8               | 27.5x                  | 4.9x                     |
| SEAPEARL        | 312.7             | +1.5% | 188.3             | 75.9x | 22.1x | LHBL                       | 26,581                   | 1.6%                       | 16.9x | 4.2x  | EHL                | 93.4                       | -4.0%                      | 112.0               | 14.7x                  | 1.2x                     |
| MONNOAGML       | 943.5             | +1.3% | 28.8              | NM    | 5.4x  | ISLAMIBANK                 | 24,155                   | 1.4%                       | 11.0x | 0.8x  | AAMRANET           | 60.8                       | -4.7%                      | 104.1               | 19.1x                  | 1.6x                     |
|                 |                   |       |                   |       |       | SEAPEARL                   | 20,076                   | 1.2%                       | 75.9x | 22.1x |                    |                            |                            |                     |                        |                          |
|                 |                   |       |                   |       |       | NBL                        | 19,116                   | 1.1%                       | NM    | 0.6x  |                    |                            |                            |                     |                        |                          |
|                 |                   |       |                   |       |       | OLYMPIC                    | 18,908                   | 1.1%                       | 20.3x | 3.3x  | <b>Block Trade</b> | <b>Maximum Price (BDT)</b> | <b>Minimum Price (BDT)</b> | <b>No. of Trade</b> | <b>Quantity ('000)</b> | <b>Turnover (BDT Mn)</b> |
|                 |                   |       |                   |       |       | PUBALIBANK                 | 18,525                   | 1.1%                       | 5.5x  | 0.6x  | BEXGSUKUK          | 85.0                       | 85.0                       | 1.0                 | 5,600                  | 476.00                   |
|                 |                   |       |                   |       |       | CITYBANK                   | 17,615                   | 1.0%                       | 4.5x  | 0.8x  | BXPHERMA           | 135.0                      | 135.0                      | 1.0                 | 3,500                  | 472.50                   |
|                 |                   |       |                   |       |       | ROBI                       | 15,714                   | 0.9%                       | 85.7x | 2.4x  | SEAPEARL           | 305.2                      | 281.7                      | 13.0                | 363                    | 104.44                   |
|                 |                   |       |                   |       |       | ALARABANK                  | 14,609                   | 0.9%                       | 14.6x | 1.1x  | FORTUNE            | 75.0                       | 72.8                       | 4.0                 | 1,202                  | 87.83                    |
|                 |                   |       |                   |       |       | BSRMLTD                    | 14,417                   | 0.9%                       | NM    | 0.7x  | AL-HAJTEX          | 194.0                      | 177.0                      | 19.0                | 206                    | 38.02                    |
|                 |                   |       |                   |       |       | PRIMEBANK                  | 13,945                   | 0.8%                       | 6.6x  | 0.7x  | MEGHNALIFE         | 84.5                       | 80.0                       | 4.0                 | 446                    | 35.71                    |
|                 |                   |       |                   |       |       | UPGDCL                     | 13,547                   | 0.8%                       | 15.4x | 4.7x  | BANKASIA           | 20.2                       | 20.2                       | 1.0                 | 1,632                  | 32.97                    |
|                 |                   |       |                   |       |       |                            |                          |                            |       |       | POWERGRID          | 47.6                       | 47.6                       | 1.0                 | 550                    | 26.18                    |
|                 |                   |       |                   |       |       |                            |                          |                            |       |       | SONALIPAPR         | 660.0                      | 615.1                      | 6.0                 | 19                     | 12.34                    |
|                 |                   |       |                   |       |       |                            |                          |                            |       |       | QUASEMIND          | 58.4                       | 56.4                       | 2.0                 | 150                    | 8.56                     |

\* 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            |
| BXPHARMA     | 135.0               | 135.0               | 472.5             | 3,500           | 1            |
| SEAPEARL     | 305.2               | 281.7               | 104.4             | 363             | 13           |
| FORTUNE      | 75.0                | 72.8                | 87.8              | 1,202           | 4            |
| AL-HAJTEX    | 194.0               | 177.0               | 38.0              | 206             | 19           |
| MEGHNALIFE   | 84.5                | 80.0                | 35.7              | 446             | 4            |
| BANKASIA     | 20.2                | 20.2                | 33.0              | 1,632           | 1            |
| POWERGRID    | 47.6                | 47.6                | 26.2              | 550             | 1            |
| SONALIPAPR   | 660.0               | 615.1               | 12.3              | 19              | 6            |
| QUASEMIND    | 58.4                | 56.4                | 8.6               | 150             | 2            |
| IPDC         | 55.0                | 51.9                | 7.5               | 137             | 3            |
| LHBL         | 63.7                | 63.4                | 7.5               | 118             | 7            |
| BDCOM        | 44.0                | 43.1                | 6.7               | 152             | 2            |
| BEACONPHAR   | 298.4               | 298.4               | 6.0               | 20              | 1            |
| LRBDL        | 35.1                | 31.6                | 5.8               | 180             | 6            |
| TITASGAS     | 36.9                | 36.9                | 5.5               | 150             | 2            |
| SUNLIFEINS   | 51.4                | 47.8                | 5.3               | 107             | 10           |
| GENEXIL      | 98.0                | 98.0                | 4.4               | 45              | 2            |
| SALVOCHEM    | 60.0                | 55.7                | 4.3               | 76              | 2            |
| BENGALWTL    | 41.7                | 38.0                | 4.1               | 103             | 6            |
| DOMINAGE     | 15.3                | 15.0                | 3.8               | 255             | 5            |
| OLYMPIC      | 174.0               | 174.0               | 3.5               | 20              | 1            |
| <b>Total</b> |                     |                     | <b>1,397.4</b>    |                 | <b>145</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 |
| GRENDEL T  |             | 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  |
| BANKASIA   |             | 0.0%     | 15%  | Record Date | 6-Apr-23  |
| SKICL      |             | 2.0%     | 12%  | Record Date | 9-Apr-23  |
| UNITEDINS  |             | 0.0%     | 10%  | Record Date | 9-Apr-23  |

**Important DSE News**
**UNITEDINS**

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2022. Date of AGM: 18.05.2023, Time: 11:00 AM, Venue: Digital Platform. Record date: 09.04.2023. The Company has also reported EPS of Tk. 1.75, NAV per share of Tk. 32.68 and NOCFPS of Tk. 0.69 for the year ended December 31, 2022 as against Tk. 1.65, Tk. 36.45 and Tk. 2.49 respectively for the year ended December 31, 2021.

**BANKASIA**

The Board of Directors has recommended 15% cash dividend for the year ended December 31, 2022. Date of AGM: 30.04.2023, Time: 11:00 AM. Venue: Digital Platform. Record Date: 06.04.2023. The Company has also reported Consolidated EPS of Tk. 2.62, Consolidated NAV per share of Tk. 24.41 and Consolidated NOCFPS of Tk. 13.82 for the year ended December 31, 2022 as against Tk. 2.34, Tk. 23.33 and Tk. 15.23 respectively for the year ended December 31, 2021.

**BARKAPOWER**

The company has informed that Abdul Bari, one of the Directors of the Company, has completed his sale of 47,14,138 shares of the Company whereas NRB Ventures (Pvt.) Limited and Fusion Holdings (Pvt) Limited, both the Corporate Directors of the company, have completed their buying of 20,45,579 shares and 26,68,559 shares respectively at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 06.02.2023.

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