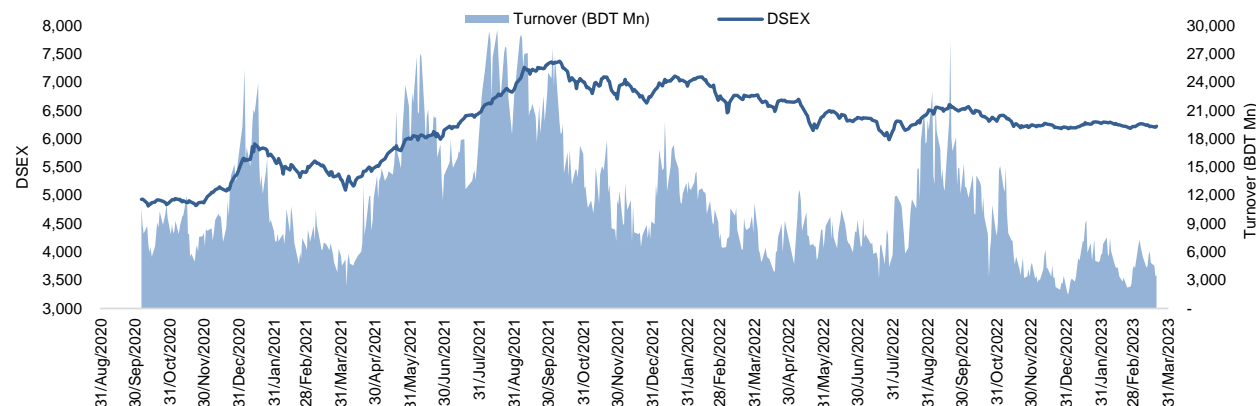


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.30%) gained 18.73 points and closed at 6,222.90. The blue-chip index DS30 (+0.22%), the Shariah-based index DSES (+0.44%), and the large-cap index CDSET (+0.13%) closed at 2,220.62, 1,355.84, and 1,217.36 points, respectively. All the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.33% followed by Pharmaceutical (+0.33%), NBF1 (+0.05%), Bank (+0.03%), Engineering (+0.02%), Fuel & Power (+0.01%), and Telecommunication (0.00%), respectively. Block trades contributed 10.6% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+0.2%) was the most traded share with a turnover of BDT 308 million.



| Index | Closing | Opening | Point Δ | %Δ | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX | 6,222.90 | 6,204.18 | +18.73 | +0.30% | +0.3% |
| DS30 | 2,220.62 | 2,215.82 | +4.80 | +0.22% | +1.2% |
| DSES | 1,355.84 | 1,349.94 | +5.91 | +0.44% | -0.2% |
| CDSET | 1,217.36 | 1,215.77 | +1.59 | +0.13% | +0.2% |

| | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category | 88 | 16 | 226 | 330 |
| A Category (Equity) | 56 | 14 | 153 | 223 |
| B Category (Equity) | 22 | 2 | 63 | 87 |
| N Category (Equity) | 2 | 0 | 2 | 4 |
| Z Category (Equity) | 8 | 0 | 8 | 16 |
| Mutual Funds | 0 | 0 | 18 | 18 |
| Corporate Bonds | 0 | 0 | 1 | 1 |
| Treasury Bonds | 0 | 0 | 0 | 0 |

* Based on Traded Scrips

| | Today | Last Day | Daily %Δ | |
|----------|--------------|-----------|-----------|--------|
| Mcap | Mn BDT | 7,619,694 | 7,608,463 | +0.1% |
| | Mn USD | 71,793 | 71,687 | |
| Turnover | Mn BDT | 3,496 | 3,447 | +1.4% |
| | Mn USD | 33 | 32 | |
| Volume | Mn Shares | 52 | 48 | +7.8% |
| | No. of Trade | 83,333 | 67,113 | +24.2% |

* Average Interbank Exchange Rate is BDT 106.13 as of Mar 20, 2023

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Figure: Sectorial Turnover (BDT Mn)

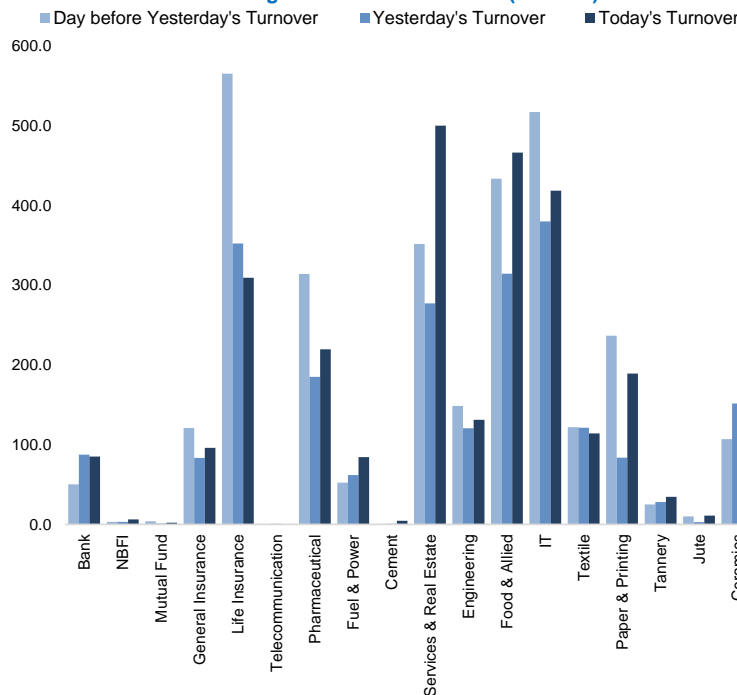
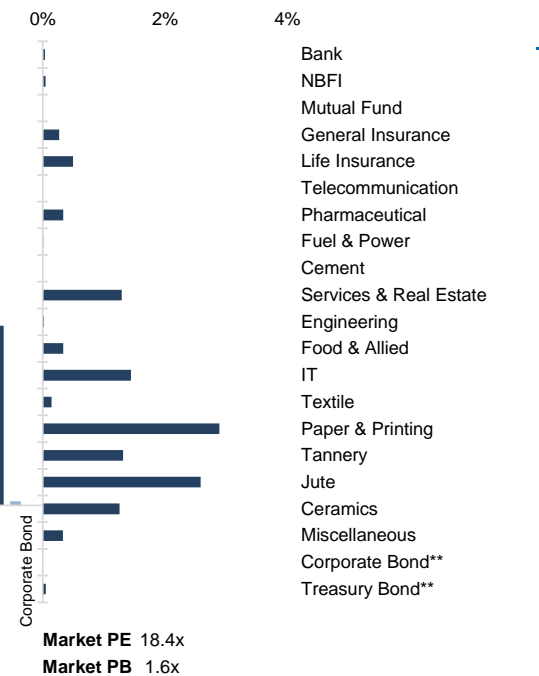


Figure: Sectorial Mcap Change



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 | 1,436 | 1,435 | +0.50 | +0.03% | 34 | 670,579 | 8.9% | 85.1 | 2.7% | 7.8x | 0.7x | GP | 386,996 | 8.6% | 0.1 | 12.9x | 8.4x |
| NBFI | 1,917 | 1,916 | +0.88 | +0.05% | 23 | 187,043 | 2.5% | 6.3 | 0.2% | NM | 4.4x | WALTONHIL | 317,378 | 7.1% | 0.0 | 40.4x | 4.8x |
| Mutual Fund | 825 | 825 | - | - | 37 | 37,318 | 0.5% | 2.1 | 0.1% | NM | 0.7x | BATBC | 280,098 | 6.2% | 0.2 | 15.7x | 6.8x |
| General Insurance | 3,065 | 3,056 | +8.21 | +0.27% | 42 | 89,441 | 1.2% | 95.9 | 3.1% | 15.0x | 1.4x | SQURPHARMA | 185,977 | 4.1% | 2.2 | 9.7x | 1.8x |
| Life Insurance | 2,578 | 2,565 | +12.70 | +0.50% | 14 | 72,301 | 1.0% | 309.1 | 9.9% | NM | NM | ROBI | 157,138 | 3.5% | 0.1 | 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% | 0.0 | 31.1x | 4.7x |
| Pharmaceutical | 3,697 | 3,684 | +12.26 | +0.33% | 34 | 717,070 | 9.5% | 219.6 | 7.0% | 18.5x | 2.4x | UPGDCL | 135,475 | 3.0% | 0.0 | 15.4x | 4.7x |
| Fuel & Power | 1,695 | 1,695 | +0.16 | +0.01% | 23 | 447,193 | 5.9% | 84.3 | 2.7% | 17.9x | 1.1x | BEXIMCO | 103,571 | 2.3% | 0.0 | 9.0x | 1.2x |
| Cement | 2,309 | 2,309 | - | - | 7 | 110,898 | 1.5% | 4.6 | 0.1% | 57.9x | 2.6x | BERGERPBL | 80,336 | 1.8% | 1.5 | 27.2x | 6.7x |
| Services & Real Esta | 2,254 | 2,225 | +28.75 | +1.29% | 8 | 89,036 | 1.2% | 500.1 | 16.0% | 37.8x | 1.2x | MARICO | 76,277 | 1.7% | 0.1 | 20.7x | 28.6x |
| Engineering | 4,475 | 4,474 | +0.76 | +0.02% | 42 | 525,233 | 7.0% | 131.2 | 4.2% | 56.1x | 2.1x | ICB | 74,119 | 1.7% | 0.0 | NM | 1.7x |
| Food & Allied | 21,762 | 21,690 | +72.38 | +0.33% | 21 | 387,769 | 5.1% | 466.0 | 14.9% | 20.1x | 8.1x | BXPHERMA | 65,222 | 1.5% | 0.2 | 14.1x | 1.6x |
| IT | 3,314 | 3,267 | +47.07 | +1.44% | 11 | 43,208 | 0.6% | 418.5 | 13.4% | 31.5x | 3.0x | BEACONPHAR | 63,756 | 1.4% | 16.1 | 68.0x | 10.3x |
| Textile | 1,578 | 1,576 | +2.22 | +0.14% | 58 | 166,278 | 2.2% | 114.1 | 3.6% | 42.7x | 1.0x | BRACBANK | 57,619 | 1.3% | 0.0 | 10.9x | 1.0x |
| Paper & Printing | 10,877 | 10,572 | +305.14 | +2.89% | 6 | 41,907 | 0.6% | 189.0 | 6.0% | 41.4x | 2.1x | ISLAMIBANK | 53,935 | 1.2% | 11.2 | 11.0x | 0.8x |
| Tannery | 3,087 | 3,047 | +40.04 | +1.31% | 6 | 32,605 | 0.4% | 34.4 | 1.1% | 47.2x | 3.1x | DUTCHBANGL | 43,554 | 1.0% | 0.0 | 7.4x | 1.1x |
| Jute | 12,551 | 12,235 | +315.74 | +2.58% | 3 | 3,070 | 0.0% | 10.9 | 0.3% | NM | 4.8x | TITASGA | 40,459 | 0.9% | 0.0 | 13.2x | 0.5x |
| Ceramics | 697 | 688 | +8.64 | +1.26% | 5 | 32,224 | 0.4% | 229.9 | 7.4% | 41.7x | 1.9x | UNILEVERCL | 37,370 | 0.8% | 14.3 | 51.2x | 22.2x |
| Miscellaneous | 4,085 | 4,071 | +13.46 | +0.33% | 14 | 222,411 | 2.9% | 225.3 | 7.2% | 13.2x | 1.8x | POWERGRID | 37,347 | 0.8% | 0.0 | NM | 0.4x |
| Corporate Bond** | 88 | 88 | - | - | 9 | 36,390 | 0.5% | 0.1 | 0.0% | NM | NM | SEAPEARL | 36,756 | 0.8% | 307.8 | 73.9x | 21.5x |
| Treasury Bond** | 95 | 95 | +0.05 | +0.05% | 252 | 3,050,079 | 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 |
|-----------------|-------------------|--------|-------------------|-------|-------|----------------------------|--------------------------|----------------------------|-------|-------|-------------------|-------------------|-------|-------------------|-------|-------|
| LEGACYFOOT | 47.3 | +10.0% | 5.8 | NM | 5.2x | SQURPHARMA | 121,685 | 7.2% | 9.7x | 1.8x | SEAPEARL | 304.4 | +0.2% | 307.8 | 73.9x | 21.5x |
| ORIONINFU | 276.1 | +8.2% | 58.4 | NM | 20.7x | BATBC | 74,086 | 4.4% | 15.7x | 6.8x | BSC | 128.4 | +3.1% | 213.6 | 8.6x | 1.6x |
| ZEALBANGLA | 151.2 | +7.8% | 4.1 | NM | NM | BEXIMCO | 71,930 | 4.3% | 9.0x | 1.2x | SPCERAMICS | 46.6 | +4.5% | 205.5 | 86.3x | 1.5x |
| HAKKANIPUL | 51.8 | +6.8% | 6.9 | NM | 2.3x | RENATA | 68,196 | 4.0% | 31.1x | 4.7x | OLYMPIC | 160.8 | +1.9% | 171.1 | 20.9x | 3.4x |
| JUTESPINN | 259.1 | +6.8% | 1.1 | NM | NM | BXPHERMA | 45,538 | 2.7% | 14.1x | 1.6x | RUPALILIFE | 94.3 | +0.1% | 130.6 | NM | NM |
| METROSPIN | 32.5 | +6.6% | 26.1 | 33.2x | 1.5x | BEACONPHAR | 44,629 | 2.6% | 68.0x | 10.3x | EHL | 98.8 | +4.2% | 125.6 | 15.5x | 1.3x |
| UNIONCAP | 8.3 | +6.4% | 5.8 | NM | NM | GP | 38,700 | 2.3% | 12.9x | 8.4x | GENEXIL | 94.6 | +3.2% | 116.5 | 28.6x | 5.1x |
| PRAGATILIF | 109.1 | +5.6% | 9.7 | NM | NM | BRACBANK | 30,976 | 1.8% | 10.9x | 1.0x | ADNTEL | 151.9 | -0.5% | 115.8 | 45.1x | 5.3x |
| INTRACO | 32.9 | +5.1% | 68.0 | 21.7x | 2.6x | LHBL | 26,581 | 1.6% | 16.9x | 4.2x | SONALIPAPR | 685.1 | +2.8% | 112.0 | 73.3x | 4.0x |
| SPCERAMICS | 46.6 | +4.5% | 205.5 | 86.3x | 1.5x | ISLAMIBANK | 24,227 | 1.4% | 11.0x | 0.8x | RDFOOD | 42.9 | -0.9% | 105.7 | 37.2x | 2.7x |

| 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) |
|----------------|-------------------|-------|-------------------|-------|------|-------------|---------------------|---------------------|--------------|-----------------|-------------------|
| RENWICKJA | 750.1 | -2.1% | 1.4 | NM | NM | SEAPEARL | 290.2 | 278.8 | 8.0 | 248 | 70.12 |
| BANKASIA | 20.4 | -1.0% | 1.2 | 7.8x | 1x | FORTUNE | 74.0 | 73.0 | 5.0 | 794 | 58.47 |
| RDFOOD | 42.9 | -0.9% | 105.7 | 37.2x | 2.7x | BEACONPHAR | 295.4 | 261.0 | 2.0 | 162 | 46.28 |
| JAMUNAOIL | 180.8 | -0.7% | 5.4 | 7.6x | 0.9x | BEXIMCO | 126.0 | 104.1 | 2.0 | 255 | 31.90 |
| SONARBAINS | 44.8 | -0.7% | 1.1 | 22.9x | 2.1x | SQURPHARMA | 207.7 | 204.9 | 35.0 | 127 | 26.08 |
| PIONEERINS | 71.5 | -0.6% | 7.1 | 11.6x | 1.5x | BDFINANCE | 44.1 | 44.1 | 1.0 | 475 | 20.95 |
| DELTALIFE | 146.6 | -0.5% | 29.2 | NM | NM | ADNTEL | 167.5 | 150.0 | 3.0 | 68 | 10.76 |
| ADNTEL | 151.9 | -0.5% | 115.8 | 45.1x | 5.3x | FEKDIL | 17.2 | 17.2 | 1.0 | 520 | 8.94 |
| RUPALIINS | 26.2 | -0.4% | 1.3 | 14.0x | 1.2x | LHBL | 64.1 | 63.6 | 12.0 | 140 | 8.94 |
| ANLIMAYARN | 31.6 | -0.3% | 1.7 | NM | 3.0x | EGEN | 42.5 | 40.8 | 13.0 | 198 | 8.15 |

* 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 | 290.2 | 278.8 | 70.1 | 248 | 8 |
| FORTUNE | 74.0 | 73.0 | 58.5 | 794 | 5 |
| BEACONPHAR | 295.4 | 261.0 | 46.3 | 162 | 2 |
| BEXIMCO | 126.0 | 104.1 | 31.9 | 255 | 2 |
| SQURPHARMA | 207.7 | 204.9 | 26.1 | 127 | 35 |
| BDFINANCE | 44.1 | 44.1 | 20.9 | 475 | 1 |
| ADNTEL | 167.5 | 150.0 | 10.8 | 68 | 3 |
| FEKDIL | 17.2 | 17.2 | 8.9 | 520 | 1 |
| LHBL | 64.1 | 63.6 | 8.9 | 140 | 12 |
| EGEN | 42.5 | 40.8 | 8.2 | 198 | 13 |
| BATBC | 513.5 | 479.8 | 6.4 | 13 | 6 |
| BSCCL | 201.0 | 199.8 | 5.8 | 29 | 5 |
| MARICO | 2,421.5 | 2,320.0 | 5.7 | 2 | 5 |
| EBL | 31.3 | 29.8 | 5.0 | 164 | 8 |
| SONALIPAPR | 640.0 | 640.0 | 4.5 | 7 | 3 |
| AL-HAJTEX | 183.1 | 165.0 | 4.2 | 25 | 6 |
| FINEFOODS | 67.2 | 65.0 | 3.8 | 58 | 2 |
| PTL | 72.5 | 69.3 | 3.7 | 52 | 4 |
| KARNAPHULI | 30.4 | 30.4 | 3.6 | 120 | 1 |
| QUASEMIND | 64.0 | 64.0 | 3.0 | 47 | 6 |
| BRACBANK | 35.2 | 34.7 | 2.6 | 75 | 5 |
| IFIC | 11.8 | 10.4 | 2.5 | 222 | 4 |
| Total | | | 369.1 | | 175 |

Important DSE News
CENTRALINS

The Board of Directors has recommended 15% Cash Dividend for the year ended December 31, 2022. Date of AGM: 28.05.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 16.04.2023. The Company has also reported EPS of Tk. 2.03, NAV per share of Tk. 49.48 and NOCFPS of Tk. 2.51 for the year ended December 31, 2022 as against Tk. 2.41, Tk. 49.35 and Tk. 2.77 respectively for the year ended December 31, 2021.

PHENIXINS

The Board of Directors has recommended 15% cash dividend for the year ended December 31, 2022. Date of AGM: 31.05.2023, Time: 2:30 PM, Venue: Digital Platform. Record Date: 17.04.2023. The Company has reported EPS of Tk. 2.02, NAV per share of Tk. 37.10 and NOCFPS of Tk. 1.37 for the year ended December 31, 2022 as against Tk. 2.20, Tk. 39.90 and Tk. 4.06 respectively for the year ended December 31, 2021.

BNICL

The company has informed that Professor Dr. Mijanur Rahman, Independent Director of the company retired from the Board with effect from March 13, 2023.

BARKAPOWER

The company has informed that the Board of Directors has elected Mr. Faisal Ahmed Chowdhury as Chairman and Mr. Md. Ahsanul Kabir as Vice Chairman of the company with effect from March 20, 2023.

The company has informed that Mr. Abdul Bari has retired from the Board of Directors of the company with effect from March 20, 2023. Subsequently, Mr. Faisal Ahmed Chowdhury, Mr. Nanu Kazi Mohammed Miah representing NRB Ventures (Pvt.) Limited and Mr. Md. Ahsanul Kabir representing Fusion Holdings (Pvt.) Limited have been appointed as Nominated Directors in the Board of Directors of the company with effect from March 20, 2023.

Upcoming Corporate Events

| DSE Ticker | Right Share | Dividend | | Event | Date |
|------------|-------------|----------|------|-------------|-----------|
| | | Stock | Cash | | |
| 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 |
| 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 |
| CENTRALINS | | 0.0% | 15% | Record Date | 16-Apr-23 |
| PHENIXINS | | 0.0% | 15% | Record Date | 17-Apr-23 |

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