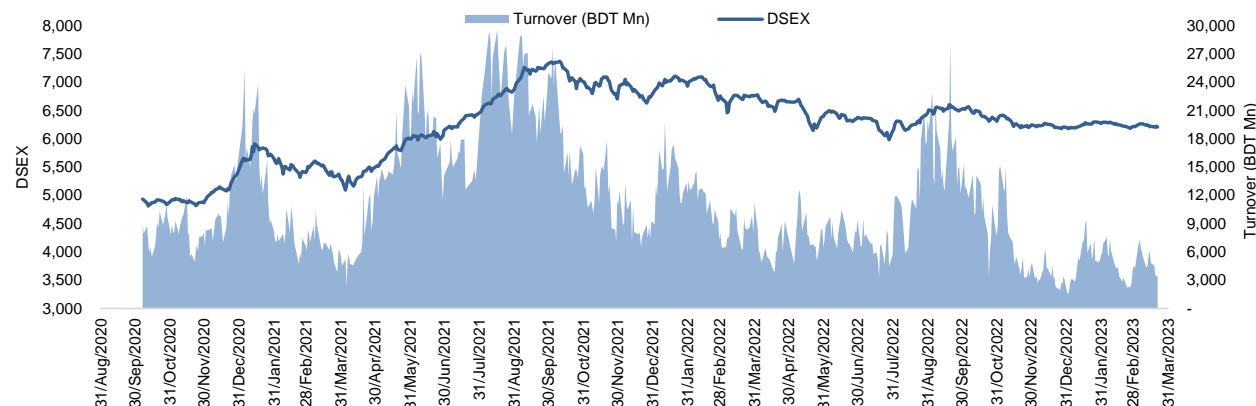


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.26%) lost 16.26 points and closed at 6,206.64. The blue-chip index DS30 (-0.23%), the Shariah-based index DSES (-0.25%), and the large-cap index CDSET (-0.18%) closed at 2,215.43, 1,352.50, and 1,215.17 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 0.22% followed by Pharmaceutical (-0.21%), Food & Allied (-0.16%), Fuel & Power (-0.13%), NBF (0.04%), Engineering (-0.04%), and Telecommunication (0.00%), respectively. Block trades contributed 17.0% of the overall market turnover. Eastern Housing Limited (-1.5%) was the most traded share with a turnover of BDT 191 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,206.64	6,222.90	-16.26	-0.26%	-0.0%
DS30	2,215.43	2,220.62	-5.19	-0.23%	+0.9%
DSES	1,352.50	1,355.84	-3.34	-0.25%	-0.5%
CDSET	1,215.17	1,217.36	-2.19	-0.18%	+0.1%

	Advanced	Declined	Unchanged	Total
All Category	18	84	213	315
A Category (Equity)	9	61	139	209
B Category (Equity)	7	15	64	86
N Category (Equity)	0	2	2	4
Z Category (Equity)	2	6	8	16
Mutual Funds	0	0	16	16
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,609,351	7,619,694	-0.1%
	Mn USD	72,456	72,555	
Turnover	Mn BDT	3,285	3,496	-6.0%
	Mn USD	31	33	
Volume	Mn Shares	47	52	-10.1%
	No. of Trade	73,769	83,333	-11.5%

\* Average Interbank Exchange Rate is BDT 105.02 as of Mar 21, 2023

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Figure: Sectorial Turnover (BDT Mn)

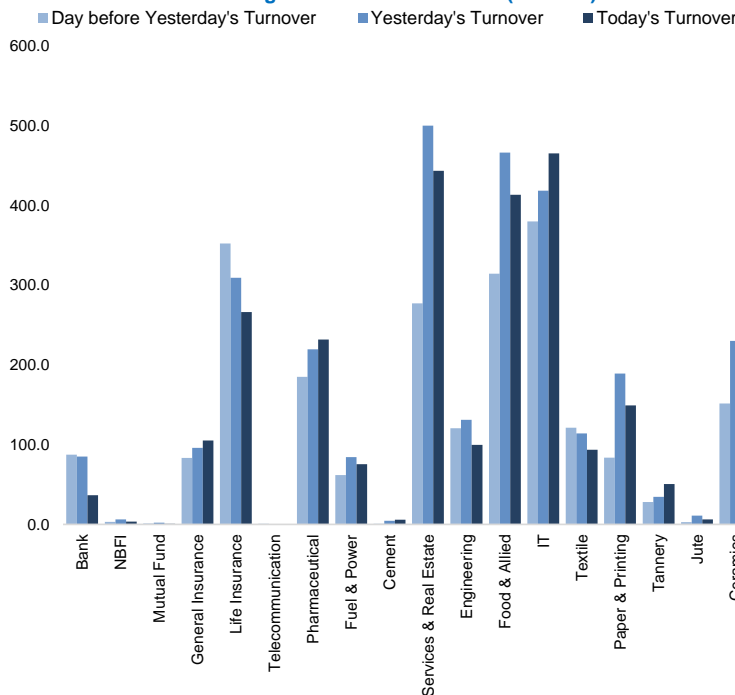
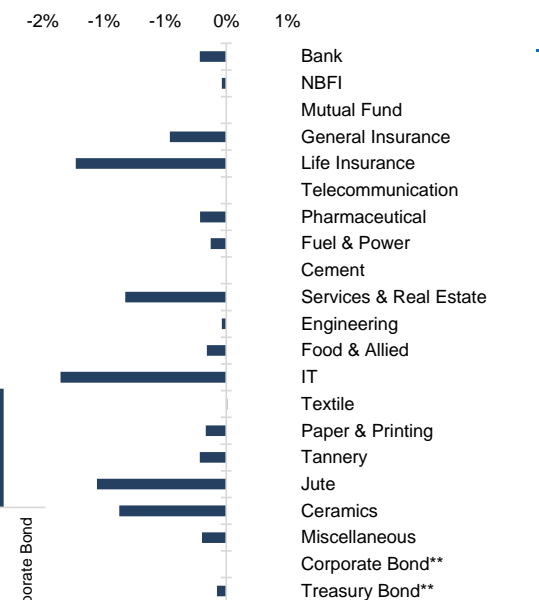


Figure: Sectorial Mcap Change



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	1,432	1,436	-3.10	-0.22%	34	669,131	8.9%	36.5	1.3%	7.8x	0.7x	GP	386,996	8.6%	0.0	12.9x	8.4x
NBFI	1,917	1,917	-0.71	-0.04%	23	186,974	2.5%	3.4	0.1%	NM	4.4x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	825	825	-	-	37	37,318	0.5%	0.9	0.0%	NM	0.7x	BATBC	280,098	6.3%	0.2	15.7x	6.8x
General Insurance	3,050	3,065	-14.13	-0.46%	42	89,029	1.2%	105.2	3.9%	15.0x	1.4x	SQURPHARM/	185,977	4.2%	1.6	9.7x	1.8x
Life Insurance	2,546	2,578	-31.72	-1.23%	14	71,412	0.9%	266.2	9.8%	NM	NM	ROBI	157,138	3.5%	0.0	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.0	0.0%	16.8x	4.7x	RENATA	139,689	3.1%	0.0	31.1x	4.7x
Pharmaceutical	3,689	3,697	-7.88	-0.21%	34	715,541	9.5%	231.7	8.5%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,693	1,695	-2.17	-0.13%	23	446,621	5.9%	75.5	2.8%	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%	5.8	0.2%	57.9x	2.6x	BERGERPBL	80,234	1.8%	4.2	27.2x	6.7x
Services & Real Esta	2,235	2,254	-18.59	-0.83%	8	88,302	1.2%	443.3	16.3%	37.5x	1.2x	MARICO	76,277	1.7%	1.5	20.7x	28.6x
Engineering	4,473	4,475	-1.62	-0.04%	42	525,043	7.0%	99.8	3.7%	56.1x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,728	21,762	-34.47	-0.16%	21	387,155	5.1%	413.2	15.2%	20.1x	8.1x	BXPHERMA	65,222	1.5%	0.0	14.1x	1.6x
IT	3,269	3,314	-44.90	-1.35%	11	42,623	0.6%	465.2	17.1%	31.1x	2.9x	BEACONPHAR	63,132	1.4%	34.6	67.3x	10.2x
Textile	1,578	1,578	+0.12	+0.01%	58	166,291	2.2%	93.4	3.4%	42.7x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,859	10,877	-18.26	-0.17%	6	41,837	0.6%	149.2	5.5%	41.3x	2.1x	ISLAMIBANK	53,452	1.2%	0.7	10.9x	0.8x
Tannery	3,080	3,087	-6.67	-0.22%	6	32,534	0.4%	50.5	1.9%	47.1x	3.1x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	12,418	12,551	-132.74	-1.06%	3	3,038	0.0%	6.3	0.2%	NM	4.8x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	691	697	-6.09	-0.87%	5	31,942	0.4%	131.6	4.8%	41.4x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,077	4,085	-8.08	-0.20%	14	221,972	2.9%	149.0	5.5%	13.1x	1.8x	UNILEVERCL	37,295	0.8%	8.4	51.1x	22.2x
Corporate Bond**	88	88	-	-	9	36,390	0.5%	0.4	0.0%	NM	NM	SEAPEARL	36,720	0.8%	166.6	73.8x	21.5x
Treasury Bond**	95	95	-0.07	-0.08%	252	3,047,792	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
LEGACYFOOT	51.1	+8.0%	16.1	NM	5.7x	SQURPHARMA	121,685	7.2%	9.7x	1.8x	EHL	97.3	-1.5%	191.4	15.3x	1.3x
RDFOOD	44.0	+2.6%	160.2	38.2x	2.8x	BATBC	74,086	4.4%	15.7x	6.8x	GENEXIL	92.4	-2.3%	185.7	27.9x	5.0x
EMERALDOIL	31.9	+1.9%	7.7	NM	NM	BEXIMCO	71,930	4.3%	9.0x	1.2x	SEAPEARL	304.1	-0.1%	166.6	73.8x	21.5x
AL-HAJTEX	183.0	+1.7%	70.7	NM	19.3x	RENATA	68,196	4.1%	31.1x	4.7x	RDFOOD	44.0	+2.6%	160.2	38.2x	2.8x
MONNOAGML	965.4	+1.4%	27.1	NM	5.5x	BXPHERMA	45,538	2.7%	14.1x	1.6x	BSC	126.4	-1.6%	138.7	8.5x	1.6x
RSRMSTEEL	16.5	+1.2%	1.2	NM	0.4x	BEACONPHAR	44,193	2.6%	67.3x	10.2x	RUPALILIFE	89.0	-5.6%	120.2	NM	NM
SAMORITA	66.6	+1.1%	3.0	NM	1x	GP	38,700	2.3%	12.9x	8.4x	SPCERAMICS	45.3	-2.8%	110.1	83.9x	1.5x
SONALIPAPR	691.2	+0.9%	69.0	73.9x	4.0x	BRACBANK	30,976	1.8%	10.9x	1.0x	OLYMPIC	158.6	-1.4%	96.9	20.6x	3.3x
ANLIMAYARN	31.8	+0.6%	0.8	NM	3.1x	LHBL	26,581	1.6%	16.9x	4.2x	AAMRANET	60.0	-2.9%	94.2	18.8x	1.6x
MONOSPOOL	248.4	+0.6%	26.5	33.3x	5.3x	ISLAMIBANK	24,010	1.4%	10.9x	0.8x	GEMINISEA	458.1	-1.7%	87.8	32.7x	26.7x

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)
BENGALWTL	29.7	-7.5%	66.3	56.0x	1.2x	SEAPEARL	314.0	278.0	21.0	740	207.05
IMAMBUTTON	84.2	-6.8%	6.0	NM	18x	SUNLIFEINS	58.0	47.8	9.0	752	40.77
RUPALILIFE	89.0	-5.6%	120.2	NM	NM	BEACONPHAR	299.8	252.1	2.0	130	34.05
DHAKAINS	60.4	-5.2%	9.2	18.5x	1.8x	BANKASIA	20.2	20.2	1.0	1,489	30.08
UNIONCAP	7.9	-4.8%	2.9	NM	NM	SQURPHARMA	206.9	204.6	32.0	114	23.48
MEGHNALIFE	76.0	-3.9%	63.4	NM	NM	BDFINANCE	44.1	44.1	1.0	450	19.85
ICICL	27.5	-3.8%	8.7	30.4x	1.7x	AL-HAJTEX	192.0	172.0	11.0	111	19.66
ZEALBANGLA	145.8	-3.6%	0.6	NM	NM	MARICO	2,410.0	2,350.0	9.0	8	19.16
PRAGATILIF	105.4	-3.4%	11.3	NM	NM	INTRACO	32.5	32.5	1.0	456	14.82
BDWELDING	23.9	-3.2%	4.8	NM	2.1x	FORTUNE	75.1	75.1	1.0	162	12.17

\* 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	314.0	278.0	207.0	740	21
SUNLIFEINS	58.0	47.8	40.8	752	9
BEACONPHAR	299.8	252.1	34.0	130	2
BANKASIA	20.2	20.2	30.1	1,489	1
SQURPHARMA	206.9	204.6	23.5	114	32
BDFINANCE	44.1	44.1	19.8	450	1
AL-HAJTEX	192.0	172.0	19.7	111	11
MARICO	2,410.0	2,350.0	19.2	8	9
INTRACO	32.5	32.5	14.8	456	1
FORTUNE	75.1	75.1	12.2	162	1
LHBL	64.0	63.3	11.6	183	14
SPCERAMICS	46.5	44.0	11.6	262	4
BEXIMCO	109.5	104.1	11.0	101	2
BSCCL	216.0	199.8	10.2	50	9
SONALIPAPR	675.0	650.0	10.0	15	3
RDFOOD	42.5	41.5	7.5	180	2
FINEFOODS	69.0	69.0	6.9	100	1
SALVOCHEM	61.8	61.2	6.2	100	4
POWERGRID	47.3	47.2	6.1	129	8
ADNTEL	152.0	152.0	5.0	33	1
STANDBANKL	8.3	8.3	4.2	500	1
UNIONINS	41.5	41.5	4.2	100	1
<b>Total</b>			<b>557.7</b>		<b>192</b>

**Important DSE News**
**UNIQUEHRL**

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Unique Hotel & Resorts PLC' instead of 'Unique Hotel & Resorts Limited' with effect from March 23, 2023. Other things (except name) will remain unchanged.

**RECKITBEN**

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Reckitt Benckiser (Bangladesh) PLC' instead of 'Reckitt Benckiser (Bangladesh) Limited' with effect from March 23, 2023. Other things (except name) will remain unchanged.

**BXPBARMA**

IFIC Securities Limited, one of the Corporate Directors of the Company, has further informed that it has completed its sale of 1,70,00,000 shares whereas Absolute Construction & Engineering Ltd., another Corporate Director of the company, has also informed that it has completed its buying of 1,70,00,000 shares through Dhaka Stock Exchange Limited as per declaration disseminated on 13.03.2023.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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