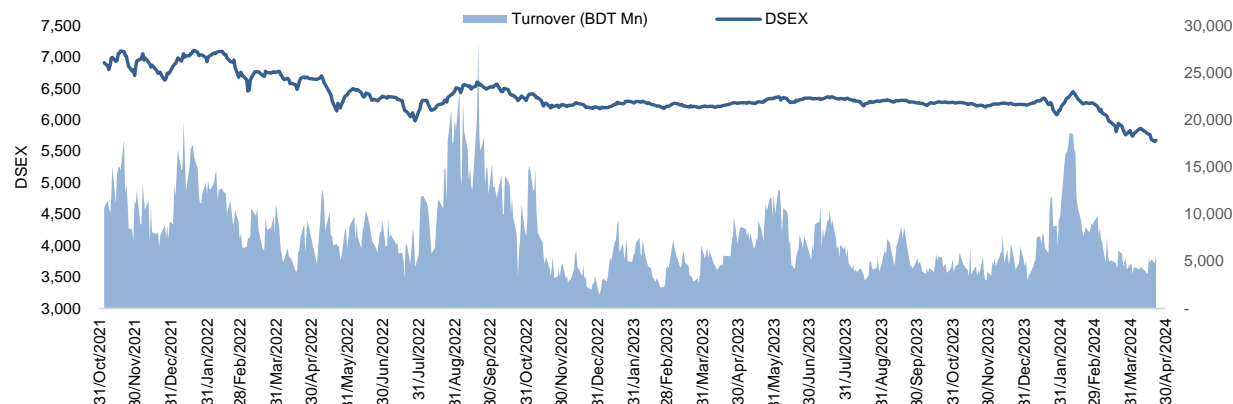


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.37%) gained 21.16 points and closed at 5,674.87. The blue-chip index DS30 (+0.07%), the Shariah-based index DSES (+0.37%), and the large-cap index CDSET (+0.12%) closed at 1,983.91, 1,243.09, and 1,074.54 points, respectively. Most of the the large-cap sectors posted positive performance today. Engineering booked the highest gain of 1.50% followed by NBF1 (+1.44%), Pharmaceutical (+0.58%), Bank (+0.55%), Fuel & Power (+0.51%), Food & Allied (+0.02%), and Telecommunication (-0.69%), respectively. Block trades contributed 12.7% of the overall market turnover. Asiatic Laboratories Limited (+6.1%) was the most traded share with a turnover of BDT 334 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,674.87	5,653.71	+21.16	+0.37%	-9.2%
DS30	1,983.91	1,982.43	+1.48	+0.07%	-5.2%
DSES	1,243.09	1,238.55	+4.55	+0.37%	-8.9%
CDSET	1,074.54	1,073.25	+1.29	+0.12%	-10.7%

	Advanced	Declined	Unchanged	Total
All Category	224	112	60	396
A Category (Equity)	146	59	30	235
B Category (Equity)	55	35	14	104
N Category (Equity)	3	0	1	4
Z Category (Equity)	20	18	15	53
Mutual Funds	20	6	11	37
Corporate Bonds	0	2	0	2
Treasury Bonds	3	1	0	4

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	7,067,162	7,047,102	+0.3%
	Mn USD	64,247	64,065	
Turnover	Mn BDT	5,749	4,782	+20.2%
	Mn USD	52	43	
Volume	Mn Shares	176	149	+18.8%
No. of Trade	137,913	143,476	-3.9%	

* Average Interbank Exchange Rate is BDT 110.00 as of Apr 22, 2024

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Figure: Sectorial Turnover (BDT Mn)

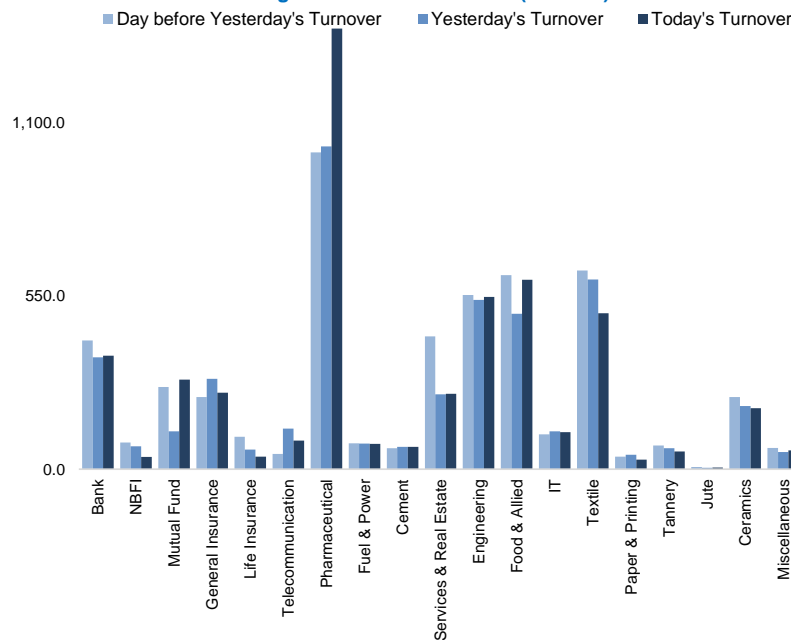
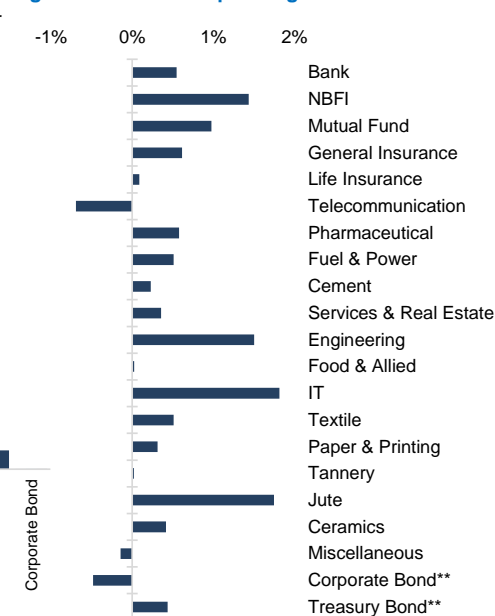


Figure: Sectorial Mcap Change



Market PE 15.6x

Market PB 1.3x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

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	1,394	1,386	+7.59	+0.55%	36	659,858	9.8%	360.8	7.2%	10.6x	0.7x	GP	314,755	8.2%	20.7	9.5x	4.7x
NBFI	1,189	1,173	+16.87	+1.44%	23	115,141	1.7%	39.2	0.8%	NM	NM	BATBC	210,762	5.5%	43.9	11.8x	3.9x
Mutual Fund	718	711	+6.96	+0.98%	37	33,538	0.5%	284.6	5.7%	NM	0.6x	WALTONHIL	195,571	5.1%	12.0	17.6x	1.8x
General Insurance	3,381	3,361	+20.67	+0.62%	43	97,940	1.5%	243.5	4.9%	17.8x	1.5x	SQURPHARMA	188,548	4.9%	36.0	9.6x	1.6x
Life Insurance	2,045	2,043	+1.83	+0.09%	15	54,358	0.8%	40.1	0.8%	NM	NM	ROBI	138,281	3.6%	66.2	43.3x	2.1x
Telecommunication	4,098	4,126	-28.65	-0.69%	3	474,458	7.0%	90.9	1.8%	12.3x	3.2x	BEXIMCO	103,842	2.7%	0.0	NM	1.2x
Pharmaceutical	3,293	3,274	+18.94	+0.58%	33	628,512	9.3%	1,400.3	27.9%	17.1x	1.9x	RENATA	89,819	2.3%	3.7	42.4x	2.8x
Fuel & Power	1,270	1,264	+6.47	+0.51%	23	334,484	5.0%	80.3	1.6%	24.4x	0.8x	BERGERPBL	81,393	2.1%	0.4	25.0x	6.1x
Cement	2,391	2,385	+5.47	+0.23%	7	114,178	1.7%	71.3	1.4%	15.9x	2.4x	UPGDCL	77,795	2.0%	2.3	11.4x	2.5x
Services & Real Estate	1,678	1,672	+5.94	+0.36%	9	92,759	1.4%	239.7	4.8%	23.5x	0.7x	MARICO	76,554	2.0%	2.0	17.0x	10.6x
Engineering	3,216	3,168	+47.64	+1.50%	42	371,507	5.5%	547.8	10.9%	16.9x	1.2x	BRACBANK	60,492	1.6%	11.3	7.9x	0.9x
Food & Allied	17,506	17,502	+4.05	+0.02%	21	321,406	4.8%	601.8	12.0%	16.7x	5.3x	BXPHARMA	53,177	1.4%	22.8	10.8x	1.2x
IT	2,803	2,753	+50.07	+1.82%	11	36,874	0.5%	118.1	2.4%	30.6x	2.4x	ISLAMIBANK	52,486	1.4%	0.0	8.5x	0.7x
Textile	1,315	1,308	+6.67	+0.51%	58	136,453	2.0%	495.7	9.9%	NM	0.9x	BEACONPHAR	46,893	1.2%	318.3	71.0x	7.4x
Paper & Printing	8,591	8,564	+26.76	+0.31%	6	39,415	0.6%	30.3	0.6%	57.8x	1.9x	ICB	45,531	1.2%	0.2	NM	1.1x
Tannery	2,577	2,577	+0.55	+0.02%	6	28,225	0.4%	56.4	1.1%	37.2x	2.6x	DUTCHBANGL	43,305	1.1%	10.4	5.4x	0.9x
Jute	17,480	17,180	+300.54	+1.75%	3	4,096	0.1%	5.6	0.1%	NM	NM	BESTHLDNG	38,874	1.0%	154.5	29.5x	0.7x
Ceramics	592	589	+2.45	+0.42%	5	26,279	0.4%	194.0	3.9%	39.7x	1.6x	POWERGRID	38,837	1.0%	7.1	NM	0.3x
Miscellaneous	4,380	4,386	-6.24	-0.14%	15	238,640	3.5%	59.6	1.2%	38.7x	1.9x	UNILEVERCL	37,691	1.0%	1.6	39.2x	16.0x
Corporate Bond**	4,566	4,588	-22.14	-0.48%	16	42,703	0.6%	0.0	0.0%	NM	NM	EBL	35,040	0.9%	10.8	5.7x	0.9x
Treasury Bond**	77	77	+0.34	+0.44%	238	2,881,495	42.8%	58.9	1.2%	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
ORIONINFU	528.6	+8.7%	280.0	NM	36.4x	SQURPHARMA	121,789	7.0%	9.6x	1.6x	ASIATICLAB	52.5	+6.1%	334.3	27.7x	1.0x
JUTESPINN	358.1	+7.3%	0.1	NM	NM	BATBC	74,086	4.3%	11.8x	3.9x	BEACONPHAR	203.0	+3.6%	318.3	71.0x	7.4x
SEMILLECMF	9.3	+6.9%	58.4	NM	1.0x	BEXIMCO	69,196	4.0%	NM	1.2x	ORIONINFU	528.6	+8.7%	280.0	NM	36.4x
FUWANGFOOD	30.4	+6.7%	133.0	NM	12.6x	RENATA	68,042	3.9%	42.4x	2.8x	GOLDENSON	23.1	+1.8%	251.2	NM	1.2x
ASIATICLAB	52.5	+6.1%	334.3	27.7x	1.0x	BXPHARMA	45,564	2.6%	10.8x	1.2x	LOVELLO	64.9	-1.1%	160.8	60.1x	4.9x
DBH1STMF	5.4	+5.9%	1.8	NM	0.6x	GP	38,700	2.2%	9.5x	4.7x	AIL	125.0	+1.0%	154.9	59.5x	5.2x
ISLAMIINS	44.6	+5.7%	1.6	12.0x	2x	BEACONPHAR	34,036	2.0%	71.0x	7.4x	BESTHLDNG	36.7	-	154.5	29.5x	0.7x
NRBBANK	9.6	+5.5%	15.4	15.5x	0.8x	ISLAMIBANK	33,649	1.9%	8.5x	0.7x	1STPRIMFMF	38.8	+0.5%	145.6	NM	3.7x
SEMLIBLSF	7.9	+5.3%	1.7	NM	0.9x	BRACBANK	30,964	1.8%	7.9x	0.9x	FUWANGFOOC	30.4	+6.7%	133.0	NM	12.6x
POWERGRID	42.5	+4.9%	7.1	NM	0.3x	LHBL	28,853	1.7%	12.7x	3.4x	FUWANGCER	25.1	+2.0%	113.9	93.0x	2.1x
						NBL	19,116	1.1%	NM	0.6x						

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)
KBPPWBIL	187.2	-4.4%	21.2	NM	15.8x	PRIMEBANK	22.3	22.3	3.0	22,000	490.60
NBL	5.7	-3.4%	10.8	NM	1x	ORIONINFU	499.0	491.5	13.0	224	110.28
STANCERAM	94.8	-3.0%	1.1	NM	NM	AIL	122.3	111.5	17.0	475	57.06
RANWICKJA	622.3	-2.8%	0.6	NM	NM	ICBSONALI1	10.3	10.3	1.0	1,500	15.45
SALVOCHEM	54.7	-2.7%	91.9	30.4x	3.4x	BEACHHATCH	65.9	61.2	8.0	212	13.62
JMISMDL	135.1	-2.5%	1.3	NM	1.6x	NAVANAPHAR	91.5	91.5	1.0	54	4.90
IFIC1STMF	4.0	-2.4%	1.0	NM	0.4x	BESTHLDNG	37.9	33.1	2.0	116	4.07
ANLIMAYARN	37.8	-2.3%	3.1	NM	3.6x	1STPRIMFMF	41.9	40.5	4.0	94	3.89
EBL	25.8	-2.3%	10.8	5.7x	0.9x	POPULARLIF	61.0	61.0	4.0	55	3.36
GREENDELMEF	4.4	-2.2%	4.3	NM	0.5x	DOMINAGE	15.8	15.8	1.0	190	3.00

* 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	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
PRIMEBANK	22.3	22.3	490.6	22,000	3
ORIONINFU	499.0	491.5	110.3	224	13
AIL	122.3	111.5	57.1	475	17
ICBSONALI1	10.3	10.3	15.5	1,500	1
BEACHHATCH	65.9	61.2	13.6	212	8
NAVANAPHAR	91.5	91.5	4.9	54	1
BESTHLDNG	37.9	33.1	4.1	116	2
1STPRIMFMF	41.9	40.5	3.9	94	4
POPULARLIF	61.0	61.0	3.4	55	4
DOMINAGE	15.8	15.8	3.0	190	1
LOVELLO	68.4	66.5	3.0	45	2
RUPALILIFE	118.0	118.0	3.0	25	1
NHFIL	31.0	31.0	2.2	70	1
DGIC	34.4	34.4	2.0	58	2
ACFL	20.8	20.8	1.9	94	1
KPCL	24.1	24.1	1.4	60	1
SIMTEX	23.7	23.7	1.0	42	1
ICICL	29.0	29.0	1.0	34	1
ASIATICLAB	48.0	48.0	1.0	21	1
CENTRALINS	55.1	55.1	1.0	18	1
GHAIL	16.6	16.6	0.8	50	1
MALEKSPIN	37.6	37.6	0.7	18	1
Total			730.4		77

Important DSE News
WALTONHIL

(Q3 Un-audited): EPS was Tk. 13.93 for January-March 2024 as against Tk. 7.78 for January-March 2023; EPS was Tk. 25.17 for July 2023-March 2024 as against Tk. 8.25 for July 2022-March 2023. NOCFPS was Tk. 22.88 for July 2023-March 2024 as against Tk. 73.70 for July 2022-March 2023. NAV per share (with revaluation) was Tk. 359.68 as on March 31, 2024 and Tk. 343.73 as on June 30, 2023. NAV per share (without revaluation) was Tk. 258.22 as on March 31, 2024 and Tk. 242.18 as on June 30, 2023.

OLYMPIC

Mr. Aziz Mohammad Bhai, a Sponsor Director of the company, has completed his buying of 27,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. (DSE) as per declaration disseminated on 04.03.2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
CITYBANK		10.0%	15%	Record Date	24-Apr-24
AGRANINS		0.0%	12%	Record Date	24-Apr-24
IPDC		5.0%	5%	Record Date	24-Apr-24
RECKITBEN		0.0%	550%	Record Date	25-Apr-24
CENTRALINS		0.0%	12%	Record Date	30-Apr-24
PARAMOUNT		0.0%	10%	Record Date	6-May-24
BRACBANK		10.0%	10%	Record Date	7-May-24
UTTARABANK		12.5%	18%	Record Date	7-May-24
PRIMEBANK		0.0%	18%	Record Date	7-May-24
MERCANBANK		0.0%	10%	Record Date	8-May-24
SHAHJABANK		0.0%	14%	Record Date	8-May-24
ICBIBANK		0.0%	0%	Record Date	9-May-24
MTB		0.0%	10%	Record Date	9-May-24
DUTCHBANGL		17.5%	18%	Record Date	9-May-24
PUBALIBANK		12.5%	13%	Record Date	12-May-24

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