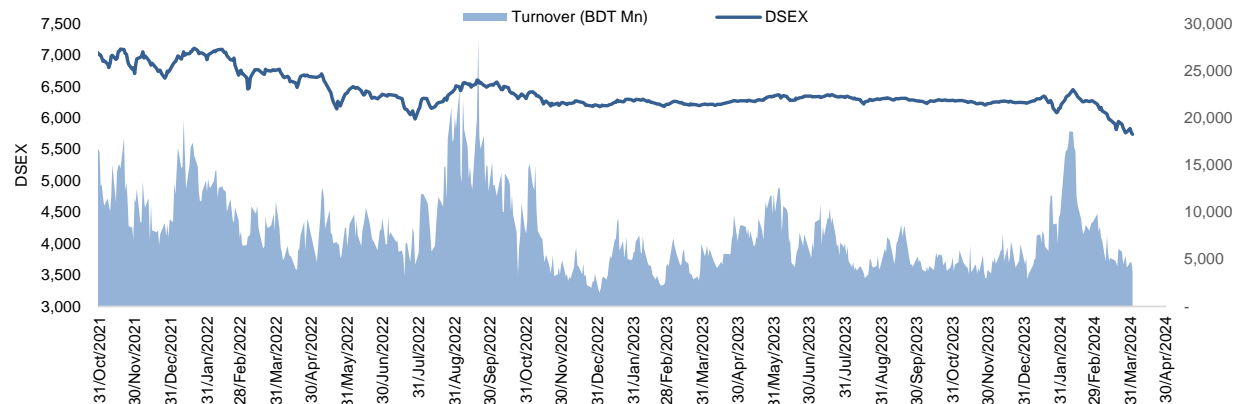


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.40%) lost 22.98 points and closed at 5,738.40. The blue-chip index DS30 (-0.28%), the Shariah-based index DSES (-0.50%), and the large-cap index CDSET (-0.10%) closed at 2,001.72, 1,245.34, and 1,091.10 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 1.30%, followed by Food & Allied (+0.70%), Telecommunication (+0.45%), Bank (-0.02%), Pharmaceutical (-0.27%), Fuel & Power (-0.35%), and NBF1 (-1.46%), respectively. Block trades contributed 8.1% of the overall market turnover. Central Pharmaceuticals Limited (-4.8%) was the most traded share with a turnover of BDT 220 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,738.40	5,761.38	-22.98	-0.40%	-8.1%
DS30	2,001.72	2,007.34	-5.61	-0.28%	-4.4%
DSES	1,245.34	1,251.65	-6.31	-0.50%	-8.7%
CDSET	1,091.10	1,092.15	-1.05	-0.10%	-9.3%

	Advanced	Declined	Unchanged	Total
All Category	79	268	43	390
A Category (Equity)	45	156	27	228
B Category (Equity)	18	77	10	105
N Category (Equity)	2	1	1	4
Z Category (Equity)	14	34	5	53
Mutual Funds	4	30	3	37
Corporate Bonds	0	1	0	1
Treasury Bonds	2	1	0	3

* Based on Traded Scripts

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,778,134	6,776,745	
	Mn USD	61,619	61,607	+0.0%
Turnover	Mn BDT	3,677	4,688	-21.6%
	Mn USD	33	43	
Volume	Mn Shares	113	149	-24.4%
No. of Trade	111,414	137,353	-18.9%	

* Average Interbank Exchange Rate is BDT 110.00 as of Apr 02, 2024

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Foysal Ahmed Research Associate (880) 1708805201 foysal.ahmed@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

■ Day before Yesterday's Turnover ■ Yesterday's Turnover ■ Today's Turnover

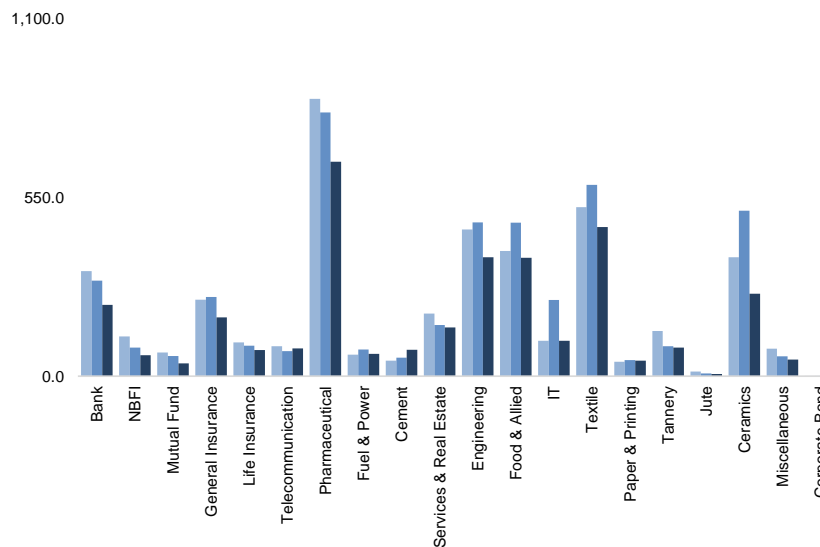
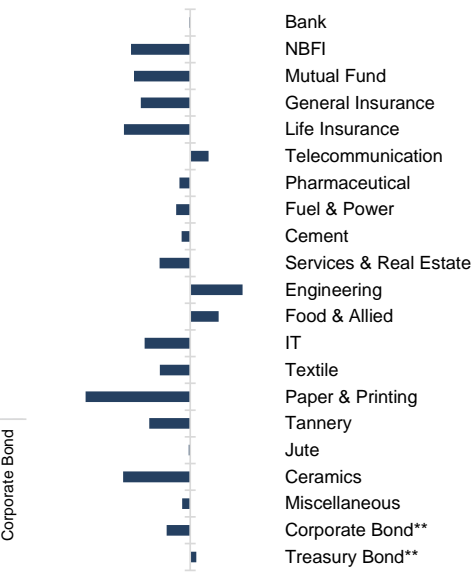


Figure: Sectorial Mcap Change

-4% -2% 0% 2%



Market PE 16.1x

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	1,425	1,425	-0.35	-0.02%	36	671,314	9.9%	219.0	6.5%	11.7x	0.7x	GP	320,966	8.3%	15.6	9.7x	4.8x
NBFI	1,261	1,280	-18.71	-1.46%	23	120,461	1.8%	64.8	1.9%	NM	NM	BATBC	217,728	5.6%	31.6	12.2x	4.1x
Mutual Fund	706	716	-9.94	-1.39%	37	32,990	0.5%	39.1	1.2%	NM	0.6x	WALTONHIL	203,598	5.2%	6.5	18.4x	1.9x
General Insurance	3,351	3,392	-41.27	-1.22%	43	96,604	1.4%	180.8	5.3%	17.6x	1.5x	SQURPHARMA	193,158	5.0%	80.8	9.9x	1.6x
Life Insurance	2,090	2,125	-34.72	-1.63%	15	55,569	0.8%	80.8	2.4%	NM	NM	ROBI	141,424	3.6%	61.6	44.3x	2.1x
Telecommunication	4,181	4,162	+18.92	+0.45%	3	483,944	7.2%	85.3	2.5%	12.6x	3.3x	BEXIMCO	103,842	2.7%	0.0	NM	1.2x
Pharmaceutical	3,298	3,307	-8.78	-0.27%	33	625,546	9.2%	659.2	19.5%	17.0x	1.9x	RENATA	87,663	2.3%	10.6	41.4x	2.8x
Fuel & Power	1,309	1,314	-4.59	-0.35%	23	335,993	5.0%	69.1	2.0%	24.5x	0.8x	UPGDCL	84,230	2.2%	1.0	12.3x	2.7x
Cement	2,445	2,450	-5.24	-0.21%	7	116,591	1.7%	81.5	2.4%	16.3x	2.4x	BERGERPBL	82,242	2.1%	5.9	25.3x	6.1x
Services & Real Estate	1,660	1,673	-12.66	-0.76%	9	91,554	1.4%	150.2	4.4%	23.2x	0.7x	LHBL	78,973	2.0%	69.8	13.3x	3.6x
Engineering	3,282	3,240	+41.96	+1.30%	42	380,013	5.6%	365.8	10.8%	17.3x	1.2x	BRACBANK	63,710	1.6%	24.0	8.5x	1.0x
Food & Allied	17,909	17,785	+124.28	+0.70%	21	328,608	4.9%	363.9	10.8%	17.0x	5.4x	ISLAMIBANK	52,486	1.4%	0.0	8.5x	0.7x
IT	2,873	2,905	-32.74	-1.13%	11	37,939	0.6%	109.1	3.2%	31.5x	2.5x	BXPBARMA	49,697	1.3%	6.0	10.1x	1.1x
Textile	1,355	1,365	-10.21	-0.75%	58	136,596	2.0%	458.9	13.6%	NM	0.9x	ICB	46,572	1.2%	0.4	NM	1.1x
Paper & Printing	8,668	8,898	-229.78	-2.58%	6	39,163	0.6%	47.7	1.4%	57.4x	1.9x	BEACONPHAR	45,068	1.2%	16.6	68.2x	7.1x
Tannery	2,612	2,638	-26.65	-1.01%	6	28,650	0.4%	87.7	2.6%	37.8x	2.6x	DUTCHBANGL	40,837	1.1%	0.6	7.4x	0.9x
Jute	17,705	17,712	-6.78	-0.04%	3	4,053	0.1%	6.8	0.2%	NM	NM	UNILEVERCL	38,660	1.0%	0.0	40.2x	16.4x
Ceramics	605	615	-10.20	-1.66%	5	27,122	0.4%	253.5	7.5%	40.9x	1.6x	EBL	38,511	1.0%	0.0	6.3x	1.0x
Miscellaneous	4,434	4,443	-8.84	-0.20%	15	241,190	3.6%	51.1	1.5%	39.1x	1.9x	BESTHLDNG	38,344	1.0%	88.2	29.1x	0.7x
Corporate Bond**	4,308	4,333	-25.27	-0.58%	16	42,543	0.6%	0.0	0.0%	NM	NM	POWERGRID	31,289	0.8%	2.1	NM	0.3x
Treasury Bond**	76	76	+0.12	+0.15%	237	2,871,084	42.4%	6.0	0.2%	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
ABB1STMF	4.6	+7.0%	2.0	NM	0.5x	SQURPHARMA	121,789	7.0%	9.9x	1.6x	CENTRALPHL	27.7	-4.8%	219.8	NM	5.1x
ASIATICLAB	45.3	+6.3%	127.6	23.9x	0.9x	BATBC	74,086	4.3%	12.2x	4.1x	SPCERAMICS	43.3	-3.1%	165.6	NM	1.4x
UTTARAFIN	24.9	+5.1%	0.0	NM	0.4x	BEXIMCO	69,196	4.0%	NM	1.2x	MALEKSPIN	36.6	-0.5%	157.8	16.3x	0.7x
FIRSTFIN	4.5	+4.7%	0.0	NM	NM	RENATA	68,042	3.9%	41.4x	2.8x	ASIATICLAB	45.3	+6.3%	127.6	23.9x	0.9x
WALTONHIL	672.1	+3.4%	6.5	18.4x	1.9x	BXPBARMA	45,564	2.6%	10.1x	1.1x	EMERALDOIL	54.2	-3.2%	98.4	41.8x	NM
BIFC	6.6	+3.1%	0.0	NM	NM	GP	38,700	2.2%	9.7x	4.8x	BESTHLDNG	36.2	+1.1%	88.2	29.1x	0.7x
DAFODILCOM	81.2	+2.5%	1.1	NM	6x	BEACONPHAR	34,036	2.0%	68.2x	7.1x	AIL	98.6	+0.8%	86.3	47.0x	4.1x
SUNLIFEINS	49.9	+2.5%	9.8	NM	NM	ISLAMIBANK	33,649	1.9%	8.5x	0.7x	GOLDENSON	20.4	+1.0%	82.6	NM	1.1x
PARAMOUNT	54.6	+2.4%	7.0	44.8x	2.1x	BRACBANK	30,964	1.8%	8.5x	1.0x	FORTUNE	41.3	-2.8%	81.9	39.6x	2.7x
NTC	434.0	+2.4%	0.0	NM	NM	LHBL	28,853	1.7%	13.3x	3.6x	SQURPHARMA	217.9	-0.0%	80.8	9.9x	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)
PREMIERLEA	4.6	-6.1%	0.2	NM	NM	CITYGENINS	82.5	81.5	2.0	1,111	91.66
RSRMSTEEL	17.1	-6.0%	2.2	NM	0x	AIL	94.4	88.5	17.0	882	81.75
DESHBANDHU	29.5	-5.8%	17.8	50.9x	0.9x	SQURPHARMA	217.7	217.7	1.0	150	32.66
BDTHAI	23.2	-5.7%	38.1	NM	0.8x	KARNAPHULI	43.0	43.0	1.0	722	31.03
TAKAFULINS	35.9	-5.5%	0.1	25.6x	1.9x	CENTRALINS	60.5	60.5	3.0	137	8.27
PRIME1CBA	5.8	-4.9%	0.0	NM	1.0x	SEAPEARL	84.5	84.5	2.0	70	5.87
CENTRALPHL	27.7	-4.8%	219.8	NM	5.1x	EGEN	33.0	32.1	2.0	180	5.85
1JANATAMF	4.1	-4.7%	0.6	NM	0.4x	CRYSTALINS	97.0	97.0	1.0	50	4.85
YPL	18.6	-4.6%	3.0	NM	3.5x	SEMILLECMF	7.8	7.8	4.0	455	3.55
ATLASBANG	66.8	-4.6%	0.2	NM	0.6x	1STPRIMFMF	37.3	37.2	4.0	83	3.09

* 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
CITYGENINS	82.5	81.5	91.7	1,111	2
AIL	94.4	88.5	81.7	882	17
SQURPHARMA	217.7	217.7	32.7	150	1
KARNAPHULI	43.0	43.0	31.0	722	1
CENTRALINS	60.5	60.5	8.3	137	3
SEAPEARL	84.5	84.5	5.9	70	2
EGEN	33.0	32.1	5.9	180	2
CRYSTALINS	97.0	97.0	4.9	50	1
SEMILLECMF	7.8	7.8	3.5	455	4
1STPRIMFMF	37.3	37.2	3.1	83	4
ALARABANK	21.6	21.6	3.0	138	1
AGNISYSL	27.1	27.1	2.7	100	1
ORIONINFU	540.0	525.0	2.7	5	3
BESTHLDNG	37.7	35.9	2.2	61	2
ROBI	24.1	24.1	1.8	75	2
AFTABAUTO	45.5	45.0	1.6	36	2
BDTHAIFOOD	30.5	30.5	1.5	49	1
GENEXIL	66.1	66.1	1.3	20	2
AL-HAJTEX	155.0	155.0	1.1	7	1
IFADAUTOS	36.1	36.1	1.1	30	1
MALEKSPIN	35.6	35.6	0.9	27	1
MONNOAGML	528.5	528.5	0.9	2	1
Total			296.1		65

Important DSE News
EXCH

Commencement of Bidding of Techno Drugs Ltd. through Book Building Method: The bidding period for Eligible Investors to determine the cut-off price of shares of Techno Drugs Ltd. through Electronic Subscription System (ESS) of the Exchanges will commence from 4:00 p.m. On April 21, 2024 and will continue till 4:00 p.m. on April 24, 2024 (round the clock) and valuation report submission period for Eligible Investors through Electronic Subscription System (ESS) of the Exchanges will start at 10:00 a.m. on April 25, 2024 and continue till 10:00 am. on April 28, 2024.

Each Eligible Investor (EI) who intends to submit application through the Electronic Subscription System (ESS) of the exchange(s) shall maintain a minimum investment of BDT 1,50,00,000 (One Crore fifty lakh only) for approved pension funds, recognized provident funds and approved gratuity funds and other EIs of BDT 3,00,00,000 (Three crore only) at market price in matured listed securities as on April 8, 2024 (day-end) as per Rule 2(1)(e) of the Bangladesh Securities and Exchange Commission (Public Issue) Rules, 2015; which is in accordance with the BSEC consent letter to Techno Drugs Ltd. Ref BSEC/C/IPO-34512023182 dated March 25, 2024.

The minimum bidding value shall be BDT 20.00 (Twenty) lakh which is in accordance with the aforesaid consent letter. The Central Depository Bangladesh Limited (CDBL) shall send a report to the exchange regarding ho/ding of EIs in listed securities and the exchange shall ensure the compliance in this regard. Participating EIs will be required to pay full bid amount (100%) and bidding fee BDT 5,000.00 (five thousand only) through United Commercial Bank PLC (A/C Name. Dhaka Stock Exchange PLC., A/C No.: 1511308000000016) in between 10:00 a.m. on April 21, 2024 to 2:00 p.m. on April 24, 2024 (during banking hour). Please visit the following website for bidding related updates: <https://www.esshangladesh.com>.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
IDLC		0.0%	15%	Record Date	4-Apr-24
DBH		0.0%	15%	Record Date	9-Apr-24
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
ICBIBANK		0.0%	0%	Record Date	9-May-24

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