

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.04%) gained 2.61 points and closed at 6,246.50. The blue-chip index DS30 (+0.31%), the Shariah-based index DSES (-0.13%), and the large-cap index CDSET (+0.08%) closed at 2,093.83, 1,364.13, and 1,202.82 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.13%, followed by Fuel & Power (+0.02%), Bank (+0.00%), Telecommunication (+0.00%), NBFI (-0.04%), Engineering (-0.14%), and Pharmaceutical (-0.24%), respectively. Block trades contributed 12.9% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+9.9%) was the most traded share with a turnover of BDT 335 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,246.50	6,243.88	+2.61	+0.04%	+0.6%
DS30	2,093.83	2,087.35	+6.48	+0.31%	-4.6%
DSES	1,364.13	1,365.89	-1.75	-0.13%	+0.4%
CDSET	1,202.82	1,201.90	+0.92	+0.08%	-1.0%

	Advanced	Declined	Unchanged	Total
All Category	93	72	182	347
A Category (Equity)	74	25	118	217
B Category (Equity)	17	41	51	109
N Category (Equity)	0	1	0	1
Z Category (Equity)	2	5	13	20
Mutual Funds	11	8	18	37
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,808,496	7,806,583	
	Mn USD	70,986	70,969	+0.0%
Turnover	Mn BDT	6,606	4,831	
	Mn USD	60	44	+36.8%
Volume	Mn Shares	222	168	+32.1%
No. of Trade		161,379	135,455	+19.1%

* Average Interbank Exchange Rate is BDT 110.00 as of Dec 28, 2023

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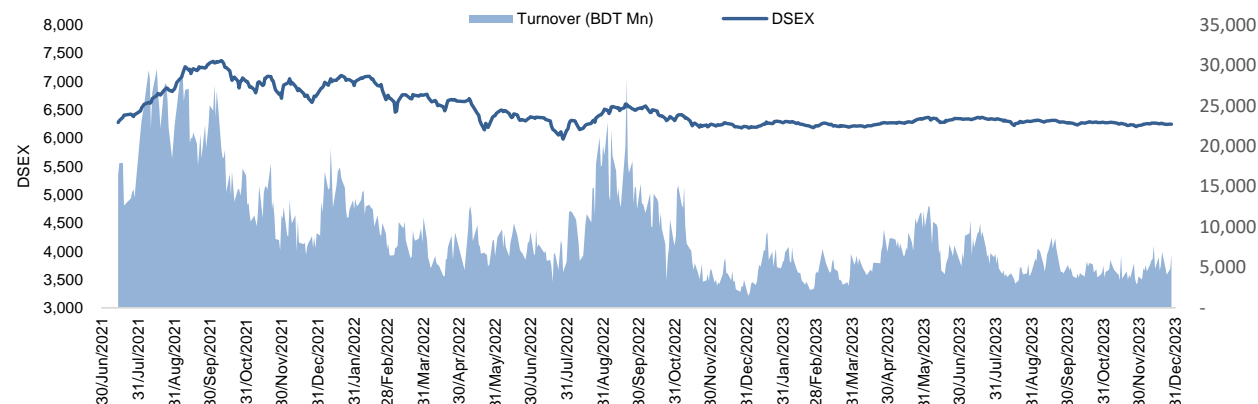


Figure: Sectorial Turnover (BDT Mn)

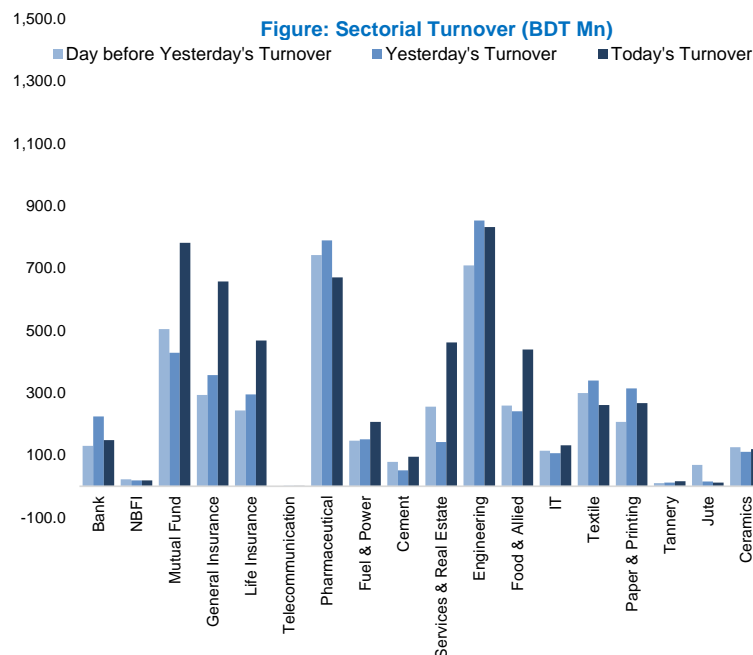
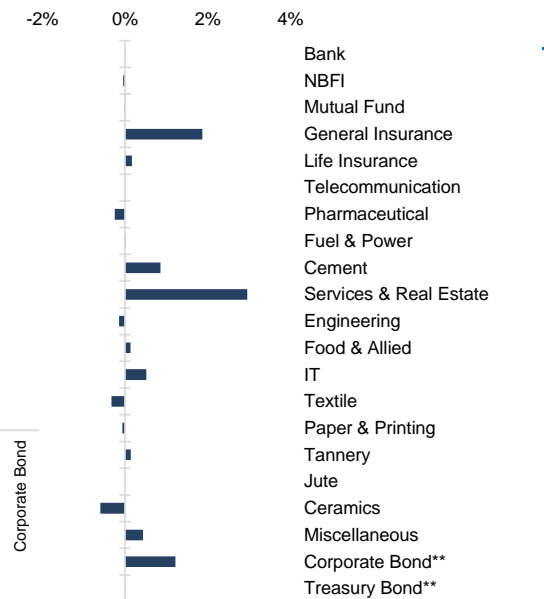


Figure: Sectorial Mcap Change



Market PE 19.4x

Market PB 1.6x

* 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	1,455	1,455	+0.01	+0.00%	35	686,511	8.9%	148.2	2.6%	12.5x	0.7x	GP	386,996	8.6%	0.9	12.5x	6.4x
NBFI	1,903	1,903	-0.80	-0.04%	23	185,135	2.4%	18.8	0.3%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	877	877	-0.15	-0.02%	37	41,474	0.5%	781.1	13.6%	NM	0.8x	BATBC	280,098	6.2%	0.5	15.4x	5.7x
General Insurance	3,489	3,425	+64.05	+1.87%	42	101,951	1.3%	656.9	11.4%	18.9x	1.6x	SQRPHARMA	186,421	4.1%	71.1	9.6x	1.5x
Life Insurance	2,638	2,633	+4.46	+0.17%	15	73,728	1.0%	467.9	8.1%	NM	NM	ROBI	157,138	3.5%	0.1	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	1.1	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,729	3,738	-9.14	-0.24%	33	721,480	9.3%	670.7	11.7%	19.6x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,692	1,692	+0.29	+0.02%	23	446,250	5.8%	206.3	3.6%	44.5x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,523	2,502	+21.43	+0.86%	7	121,295	1.6%	94.7	1.6%	17.1x	2.6x	BERGERPBL	82,274	1.8%	7.4	26.7x	6.5x
Services & Real Estate	1,519	1,475	+43.65	+2.96%	8	59,996	0.8%	461.4	8.0%	19.7x	0.8x	LHBL	80,483	1.8%	64.7	12.7x	3.8x
Engineering	4,520	4,527	-6.48	-0.14%	42	530,903	6.9%	832.0	14.5%	27.0x	1.9x	ICB	72,342	1.6%	0.0	NM	1.7x
Food & Allied	21,095	21,067	+27.95	+0.13%	21	391,925	5.1%	439.3	7.6%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.2	13.8x	1.4x
IT	2,895	2,880	+14.93	+0.52%	11	37,740	0.5%	131.8	2.3%	29.8x	2.5x	BRACBANK	57,596	1.3%	0.7	7.7x	0.9x
Textile	1,658	1,664	-5.43	-0.33%	58	171,726	2.2%	260.9	4.5%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.0	86.9x	9.0x
Paper & Printing	10,094	10,100	-6.61	-0.07%	6	38,890	0.5%	267.3	4.6%	58.8x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,104	3,100	+4.35	+0.14%	6	35,142	0.5%	16.0	0.3%	57.8x	3.3x	DUTCHBANGL	44,203	1.0%	1.9	8.0x	1.0x
Jute	16,609	16,609	-	-	3	4,263	0.1%	12.1	0.2%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	695	699	-4.17	-0.60%	5	32,124	0.4%	119.0	2.1%	53.6x	1.9x	UNILEVERCL	38,919	0.9%	0.6	39.3x	18.8x
Miscellaneous	4,265	4,247	+18.70	+0.44%	14	232,237	3.0%	169.7	2.9%	26.6x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	4,525	4,470	+54.68	+1.22%	12	41,374	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.00	+0.00%	238	3,185,862	41.3%	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
SEAPPEARL	99.7	+9.9%	334.8	16.2x	5.4x	SQRPHARMA	121,499	7.0%	9.6x	1.5x	SEAPPEARL	99.7	+9.9%	334.8	16.2x	5.4x
EMERALDOIL	73.2	+9.9%	150.6	37.0x	NM	BATBC	74,086	4.3%	15.4x	5.7x	BDTHAI	27.9	-0.7%	297.8	NM	1.0x
ICBPMF1S1	7.9	+9.7%	17.1	NM	1.4x	BEXIMCO	69,196	4.0%	34.2x	1.2x	RUPALILIFE	119.0	+3.8%	260.7	NM	NM
PRIME1ICBA	9.3	+9.4%	51.5	NM	1.5x	RENATA	68,042	3.9%	66.1x	4.4x	ORIONINFU	361.3	-6.6%	250.4	NM	24.2x
CRYSTALINS	85.1	+9.4%	45.1	27.8x	3.4x	BXPBARMA	45,564	2.6%	13.8x	1.4x	KPPL	29.9	-7.7%	225.0	NM	NM
IFILISLMF1	7.0	+9.4%	82.9	NM	1.1x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	OAL	18.4	-8.5%	222.1	NM	1.7x
ICBSONALI1	9.4	+9.3%	55.0	NM	1x	GP	38,700	2.2%	12.5x	6.4x	INTRACO	40.5	+2.0%	174.8	36.8x	3.3x
EASTERNINS	67.9	+8.3%	104.3	24.2x	1.3x	BRACBANK	30,964	1.8%	7.7x	0.9x	EMERALDOIL	73.2	+9.9%	150.6	37.0x	NM
PARAMOUNT	56.8	+8.2%	39.7	46.6x	2.2x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	CENTRALPHL	20.2	-6.9%	122.6	NM	3.6x
RELIANCE1	11.5	+6.5%	46.9	NM	1.1x	LHBL	28,562	1.6%	12.7x	3.8x	GLDNJMF	14.9	-3.2%	116.7	NM	1.5x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
STANCERAM	148.9	-10.0%	35.3	NM	NM	NBL	19,116	1.1%	NM	0.9x	CITYGENINS	54.6	49.7	3.0	5,300	278.29
SHYAMPUSUG	193.2	-8.7%	16.9	NM	NM	CITYBANK	18,190	1.0%	5.2x	0.7x	IPDC	51.9	51.9	5.0	3,108	161.32
OAL	18.4	-8.5%	222.1	NM	1.7x	OLYMPIC	16,066	0.9%	18.4x	2.9x	BDTHAI	30.0	30.0	1.0	2,150	64.50
KPPL	29.9	-7.7%	225.0	NM	NM	ROBI	15,714	0.9%	52.6x	2.4x	POWERGRID	47.2	47.2	28.0	869	41.01
ATCSLGF	10.2	-7.3%	55.6	NM	1.0x	ALARABANK	14,357	0.8%	12.5x	1.1x	SONALIPAPR	661.2	569.0	5.0	45	28.47
CAPITECGBF	12.8	-7.2%	53.4	NM	1.3x	BSRMLTD	14,210	0.8%	5.2x	0.6x	AIL	82.5	75.0	4.0	312	25.15
CENTRALPHL	20.2	-6.9%	122.6	NM	3.6x	SEAPPEARL	13,733	0.8%	16.2x	5.4x	SEAPPEARL	82.3	81.7	4.0	236	19.30
PDL	14.2	-6.6%	81.2	NM	1.0x	UPGDCL	13,547	0.8%	19.6x	4.1x	EMERALDOIL	73.2	60.0	5.0	281	18.26
ORIONINFU	361.3	-6.6%	250.4	NM	24.2x	PRIMEBANK	13,491	0.8%	5.1x	0.7x	GP	261.6	261.6	9.0	53	13.75
CAPMIBBLMF	13.1	-6.4%	19.9	NM	1.5x						BRACBANK	34.0	33.5	17.0	365	12.35

* 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
CITYGENINS	54.6	49.7	278.3	5,300	3
IPDC	51.9	51.9	161.3	3,108	5
BDTHAI	30.0	30.0	64.5	2,150	1
POWERGRID	47.2	47.2	41.0	869	28
SONALIPAPR	661.2	569.0	28.5	45	5
AIL	82.5	75.0	25.1	312	4
SEAPEARL	82.3	81.7	19.3	236	4
EMERALDOIL	73.2	60.0	18.3	281	5
GP	261.6	261.6	13.8	53	9
BRACBANK	34.0	33.5	12.4	365	17
ACMEPL	34.7	31.9	10.9	340	10
BATBC	495.0	480.0	10.3	21	5
SALVOCHEM	62.1	62.0	9.9	160	3
AL-HAJTEX	132.5	132.0	9.7	74	5
ORIONPHARM	71.8	71.7	8.9	124	4
RENATA	1,219.0	1,141.8	8.8	7	4
PARAMOUNT	53.7	53.7	8.1	150	2
JAMUNABANK	20.9	18.9	6.5	323	2
IFIC	10.3	10.2	6.2	602	3
STANDBANKL	9.2	7.8	5.7	657	4
NLTUBES	79.5	79.5	5.6	71	1
MONNOCERA	112.8	112.8	5.6	50	1
Total			851.1		205

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

Important DSE News

SHEPHERD

The Company will be placed in 'B' category from existing 'A' category with effect from January 01, 2024 as the Company has approved 5% Cash Dividend for the year ended June 30, 2023.

SUNLIFEINS

Mr. Zahid Maleque, one of the Sponsors of the company, has further informed that he has completed his sale of 8,16,000 shares of the Company at prevailing market price through Dhaka Stock Exchange Limited as per declaration disseminated on 20.12.2023..

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