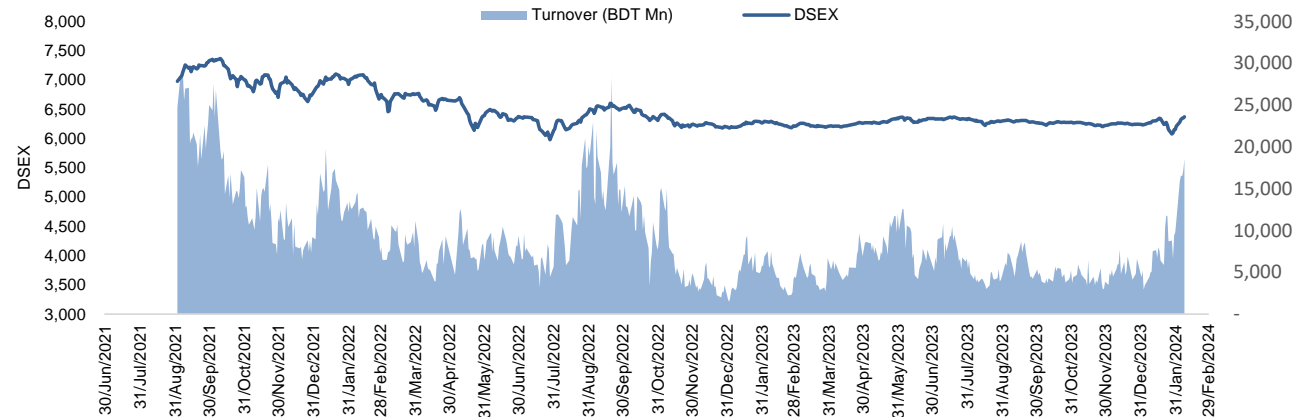


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.33%) gained 20.85 points and closed at 6,373.35. The blue-chip index DS30 (+0.14%), the Shariah-based index DSES (-0.01%), and the large-cap index CDSET (+0.29%) closed at 2,138.22, 1,387.32, and 1,200.19 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.43% followed by Food & Allied (-0.41%), Engineering (-0.15%), Fuel & Power (-0.08%), Telecommunication (-0.06%), NBFI (+0.48%), and Bank (+1.72%), respectively. Block trades contributed 1.8% of the overall market turnover. Central Pharmaceuticals Limited (-9.5%) was the most traded share with a turnover of BDT 650 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,373.35	6,352.50	+20.85	+0.33%	+2.0%
DS30	2,138.22	2,135.28	+2.94	+0.14%	+2.1%
DSES	1,387.32	1,387.51	-0.19	-0.01%	+1.7%
CDSET	1,200.19	1,196.75	+3.44	+0.29%	-0.2%

	Advanced	Declined	Unchanged	Total
All Category	210	140	44	394
A Category (Equity)	136	75	27	238
B Category (Equity)	60	55	15	130
N Category (Equity)	2	0	0	2
Z Category (Equity)	12	10	2	24
Mutual Funds	17	7	13	37
Corporate Bonds	2	1	0	3
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,725,266	7,711,324	+0.2%
	Mn USD	70,230	70,103	
Turnover	Mn BDT	18,578	17,304	+7.4%
	Mn USD	169	157	
Volume	Mn Shares	620	539	+15.1%
No. of Trade		381,108	353,525	+7.8%

* Average Interbank Exchange Rate is BDT 110.00 as of Feb 08, 2024

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Figure: Sectorial Turnover (BDT Mn)

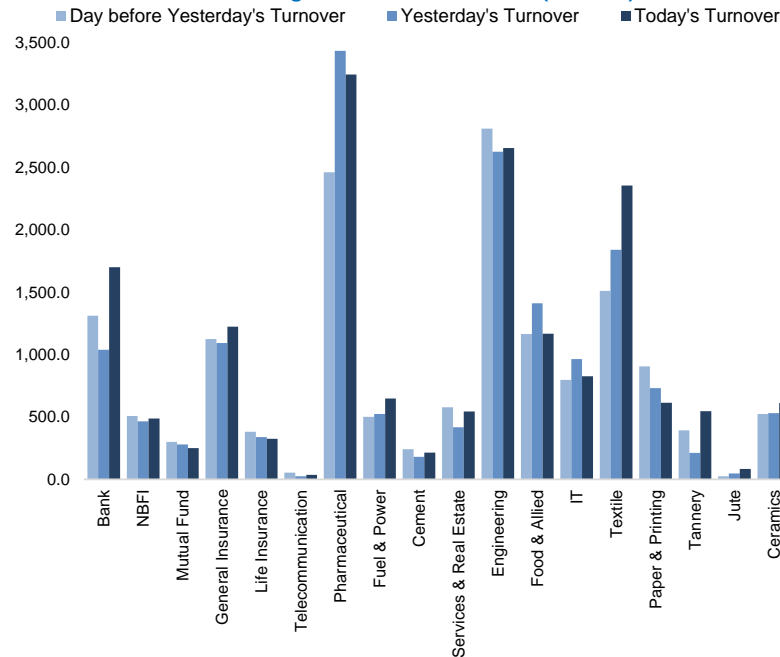
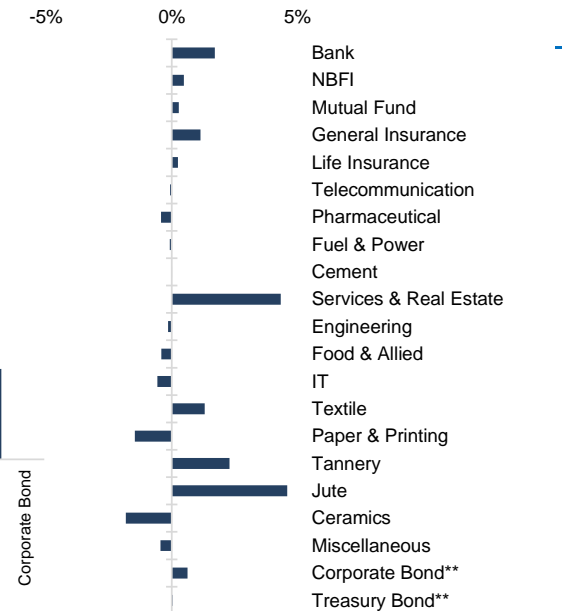


Figure: Sectorial Mcap Change



Market PE 18.6x

Market PB 1.5x

* 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	1,487	1,462	+25.13	+1.72%	35	701,565	9.1%	1,697.5	9.3%	12.8x	0.7x	GP	386,996	8.8%	0.8	12.5x	6.4x
NBFI	1,572	1,564	+7.57	+0.48%	23	154,444	2.0%	487.4	2.7%	NM	NM	BATBC	280,098	6.3%	2.5	15.4x	5.7x
Mutual Fund	822	820	+2.26	+0.28%	37	38,895	0.5%	250.3	1.4%	NM	0.8x	WALTONHIL	249,734	5.7%	10.4	22.5x	2.4x
General Insurance	3,811	3,768	+43.16	+1.15%	42	111,352	1.4%	1,222.3	6.7%	20.7x	1.8x	SQRPHARMA	192,360	4.4%	66.5	9.8x	1.6x
Life Insurance	2,422	2,416	+6.01	+0.25%	16	68,197	0.9%	323.5	1.8%	NM	NM	ROBI	157,138	3.6%	0.7	52.6x	2.4x
Telecommunication	4,877	4,880	-3.09	-0.06%	3	572,151	7.4%	36.6	0.2%	15.9x	4.1x	RENATA	122,783	2.8%	36.3	58.0x	3.9x
Pharmaceutical	3,703	3,719	-16.02	-0.43%	33	715,825	9.3%	3,240.5	17.8%	19.6x	2.2x	UPGDCL	106,722	2.4%	6.5	15.6x	3.5x
Fuel & Power	1,484	1,485	-1.16	-0.08%	23	387,326	5.0%	647.1	3.5%	26.6x	0.9x	BEXIMCO	103,842	2.4%	0.0	NM	1.2x
Cement	2,653	2,653	+0.31	+0.01%	7	128,033	1.7%	213.9	1.2%	16.8x	2.7x	BERGERPBL	89,291	2.0%	12.6	27.5x	6.6x
Services & Real Estate	1,728	1,657	+71.72	+4.33%	9	96,822	1.3%	544.2	3.0%	24.5x	0.7x	LHBL	84,896	1.9%	82.2	13.4x	4.0x
Engineering	3,873	3,879	-5.80	-0.15%	42	455,855	5.9%	2,653.0	14.5%	20.6x	1.5x	BRACBANK	62,905	1.4%	44.7	8.4x	1.0x
Food & Allied	21,353	21,441	-88.41	-0.41%	21	397,763	5.2%	1,166.6	6.4%	20.3x	7.1x	BXPHARMA	62,545	1.4%	38.3	12.7x	1.4x
IT	3,243	3,262	-18.73	-0.57%	11	42,285	0.5%	825.8	4.5%	35.1x	2.8x	ICB	60,621	1.4%	9.7	NM	1.4x
Textile	1,522	1,503	+19.72	+1.31%	58	157,667	2.0%	2,353.1	12.9%	NM	1.1x	BEACONPHAR	60,129	1.4%	321.1	91.0x	9.5x
Paper & Printing	10,477	10,633	-155.80	-1.47%	6	40,369	0.5%	614.1	3.4%	59.2x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	2,919	2,853	+65.53	+2.30%	6	33,045	0.4%	545.9	3.0%	43.6x	3.0x	DUTCHBANGL	43,829	1.0%	4.0	7.9x	1.0x
Jute	19,007	18,173	+833.65	+4.59%	3	4,426	0.1%	82.2	0.5%	NM	NM	UNILEVERCL	40,698	0.9%	2.2	41.1x	19.7x
Ceramics	666	678	-12.35	-1.82%	5	30,797	0.4%	611.4	3.4%	51.0x	1.8x	EBL	36,941	0.8%	9.4	6.5x	1.0x
Miscellaneous	4,599	4,619	-20.78	-0.45%	14	251,216	3.3%	722.8	4.0%	40.7x	2.0x	BESTHLDNG	33,789	0.8%	0.0	25.6x	0.6x
Corporate Bond**	4,349	4,322	+27.13	+0.63%	13	43,618	0.6%	1.0	0.0%	NM	NM	POWERGRID	33,213	0.8%	19.0	NM	0.3x
Treasury Bond**	86	86	+0.03	+0.04%	241	3,280,829	42.5%	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
BESTHLDNG	31.9	+10.0%	0.0	25.6x	0.6x	SQRPHARMA	121,789	7.1%	9.8x	1.6x	CENTRALPHL	29.6	-9.5%	650.4	NM	5.4x
SICL	30.9	+10.0%	0.2	NM	NM	BATBC	74,086	4.3%	15.4x	5.7x	IFIC	14.0	+7.7%	624.9	8.4x	0.7x
PHOENIXFIN	12.2	+9.9%	30.1	NM	NM	BEXIMCO	69,196	4.0%	NM	1.2x	ORIONINFU	661.3	+0.0%	597.8	NM	45.5x
PRIMEINSUR	59.1	+9.6%	29.6	28.8x	2.7x	RENATA	68,042	4.0%	58.0x	3.9x	MALEKSPIN	38.9	+8.1%	510.5	17.3x	0.8x
MITHUNKNIT	18.2	+9.6%	9.1	NM	5.7x	BXPHARMA	45,564	2.7%	12.7x	1.4x	FORTUNE	60.0	+6.6%	503.0	57.5x	3.9x
PENINSULA	27.6	+9.5%	48.9	NM	1.0x	GP	38,700	2.3%	12.5x	6.4x	FUWANGCER	23.4	-3.7%	406.2	80.7x	2.0x
BIFC	9.2	+9.5%	1.6	NM	NM	BEACONPHAR	34,036	2.0%	91.0x	9.5x	FUWANGFOOD	34.0	-5.3%	363.5	NM	14.1x
ADVENT	32.4	+9.5%	337.3	33.1x	2.1x	ISLAMIBANK	33,649	2.0%	8.5x	0.7x	OAL	21.2	-7.4%	342.5	NM	2.0x
ABBANK	11.9	+9.2%	166.1	13.8x	0.4x	BRACBANK	30,964	1.8%	8.4x	1.0x	ADVENT	32.4	+9.5%	337.3	33.1x	2.1x
SKTRIMS	35.8	+9.1%	222.7	31.1x	2.3x	LHBL	28,853	1.7%	13.4x	4.0x	BDTHAI	34.6	-5.5%	331.0	NM	1.3x
						NBL	19,116	1.1%	NM	0.8x						
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	PUBALIBANK	18,457	1.1%	4.6x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
CENTRALPHL	29.6	-9.5%	650.4	NM	5.4x	CITYBANK	18,190	1.1%	5.1x	0.7x	BEACONPHAR	225.0	219.0	3.0	201	44.07
SHYAMPSUG	252.6	-8.7%	15.3	NM	NM	OLYMPIC	16,818	1.0%	18.1x	3.0x	EIL	49.0	48.5	3.0	700	34.00
OAL	21.2	-7.4%	342.5	NM	2.0x	ROBI	15,714	0.9%	52.6x	2.4x	GP	261.7	261.6	25.0	125	32.81
RENATA	1,070.5	-6.2%	36.3	58.0x	3.9x	BSRMLTD	14,210	0.8%	4.5x	0.6x	BXPHARMA	139.6	139.6	13.0	200	27.92
INTECH	39.2	-6.2%	59.2	NM	301.5x	PRIMEBANK	13,962	0.8%	5.7x	0.8x	BSC	121.5	121.5	1.0	195	23.69
KBPPWBIL	197.3	-5.7%	82.2	NM	16.6x	UPGDCL	13,547	0.8%	15.6x	3.5x	RENATA	1,070.5	1,070.5	2.0	14	14.89
BDTHAI	34.6	-5.5%	331.0	NM	1.3x	SUMITPOWER	13,369	0.8%	10.5x	0.8x	RUPALIBANK	42.4	42.4	1.0	347	14.71
FUWANGFOOD	34.0	-5.3%	363.5	NM	14.1x	ALARABANK	13,112	0.8%	12.7x	1.1x	KARNAPHULI	60.5	55.0	7.0	247	14.17
SALAMCRST	29.6	-5.1%	25.2	NM	1.6x						SONALIANS	620.1	608.0	11.0	19	11.37
BEACHHATCH	65.2	-5.0%	196.9	39.5x	5.7x						SHYAMPSUG	280.0	276.6	3.0	32	8.98

* 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
BEACONPHAR	225.0	219.0	44.1	201	3
EIL	49.0	48.5	34.0	700	3
GP	261.7	261.6	32.8	125	25
BXPHERMA	139.6	139.6	27.9	200	13
BSC	121.5	121.5	23.7	195	1
RENATA	1,070.5	1,070.5	14.9	14	2
RUPALIBANK	42.4	42.4	14.7	347	1
KARNAPHULI	60.5	55.0	14.2	247	7
SONALIANS	620.1	608.0	11.4	19	11
SHYAMPSUG	280.0	276.6	9.0	32	3
BATBC	485.0	479.8	8.0	17	14
AIL	77.1	76.1	7.3	95	2
FUWANGFOOD	36.0	36.0	7.2	200	1
EASTERNINS	75.5	70.6	6.0	84	2
AFTABAUTO	57.0	57.0	5.7	100	1
GLOBALINS	38.0	38.0	5.7	150	1
ITC	51.5	51.5	5.2	100	2
BEXIMCO	115.6	104.1	4.7	44	7
ROBI	27.0	27.0	4.0	149	4
SKTRIMS	33.4	32.0	4.0	121	4
BEACHHATCH	68.2	68.2	3.4	50	1
SALVOCHEM	54.8	53.0	3.4	63	2
Total			338.4		160

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
ENVOYTEX		0.0%	15%	Record Date	15-Feb-24

Important DSE News
BEACHHATCH

(Q2 Un-audited): EPS was Tk. 0.88 for October-December 2023 as against Tk. 0.29 for October-December 2022; EPS was Tk. 1.32 for July-December 2023 as against Tk. 0.60 for July-December 2022. NOCFPS was Tk. 0.890 for July-December 2023 as against Tk. 1.0920 for July-December 2022. NAV per share was Tk. 11.47 as on December 31, 2023 and Tk. 10.58 as on June 30, 2023.

SKICL

The Board of Directors has recommended 13.50% cash dividend for the year ended December 31, 2023. The Company has reported EPS of Tk. 3.42, NAV per share of Tk. 22.43 and NOCFPS of Tk. 5.82 for the year ended December 31, 2023 as against Tk. 2.86, Tk. 20.17 and Tk. 4.45 respectively for the year ended December 31, 2022. Date of AGM: 31.03.2024, Time: 12:00 PM. Record Date: 03.03.2024. Venue of AGM: Hybrid system: Physical presence and by using digital platform. i) Meeting Venue: Sena Gourab Hall, SKS Tower (9th Floor), 7 VIP Road, Mohakhali, Dhaka-1206, ii) Web-link for joining AGM through digital platform: <https://skicl.bdvirtualagm.com>. The company has also informed that EPS, NOCFPS and NAV have been increased from the last year due to the positive growth of underwriting income & interest income of FDR.

CENTRALPHL

(Q2 Un-audited): EPS was Tk. (0.09) for October-December 2023 as against Tk. (0.06) for October-December 2022; EPS was Tk. (0.15) for July-December 2023 as against Tk. (0.14) for July-December 2022. NOCFPS was Tk. 0.00 for July-December 2023 as against Tk. (0.00) for July-December 2022. NAV per share was Tk. 5.44 as on December 31, 2023 and Tk. 5.96 as on June 30, 2023.

WALTONHIL

Mr. S. M. Rezaul Alam, one of the Sponsor Directors of the Company, has expressed his intention to sell 100,000 shares out of his holding of 39,000,000 shares of the company at prevailing market price (in the Public/Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

IDLC

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'IDLC Finance PLC.' instead of 'IDLC Finance Limited' with effect from February 11, 2024. Other things (except name) will remain unchanged.

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