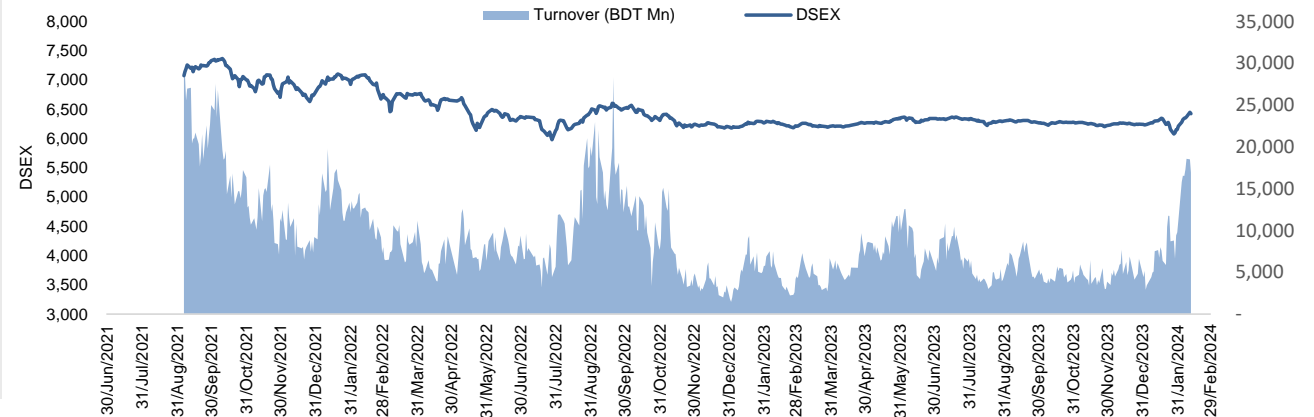


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.34%) lost 22.14 points and closed at 6,424.93. The blue-chip index DS30 (+0.28%), the Shariah-based index DSES (-0.29%), and the large-cap index CDSET (-0.28%) closed at 2,165.93, 1,393.94, and 1,213.47 points, respectively. Most of the large-cap sectors posted negative performance today. NBFI experienced the highest loss of 1.74% followed by Engineering (-1.47%), Bank (-0.54%), Fuel & Power (-0.33%), Pharmaceutical (-0.10%), Food & Allied (+0.06%), and Telecommunication (+0.06%), respectively. Block trades contributed 2.8% of the overall market turnover. Orion Pharma Ltd. (+4.4%) was the most traded share with a turnover of BDT 617 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,424.93	6,447.07	-22.14	-0.34%	+2.9%
DS30	2,165.93	2,159.92	+6.01	+0.28%	+3.4%
DSES	1,393.94	1,398.06	-4.12	-0.29%	+2.2%
CDSET	1,213.47	1,216.89	-3.42	-0.28%	+0.9%

	Advanced	Declined	Unchanged	Total
All Category	114	254	27	395
A Category (Equity)	71	148	20	239
B Category (Equity)	30	94	5	129
N Category (Equity)	2	1	0	3
Z Category (Equity)	11	11	2	24
Mutual Funds	21	9	7	37
Corporate Bonds	1	2	1	4
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,743,679	7,759,857	-0.2%
	Mn USD	70,397	70,544	
Turnover	Mn BDT	16,931	18,525	-8.6%
	Mn USD	154	168	
Volume	Mn Shares	565	631	-10.6%
No. of Trade		346,283	368,637	-6.1%

* Average Interbank Exchange Rate is BDT 110.00 as of Feb 12, 2024

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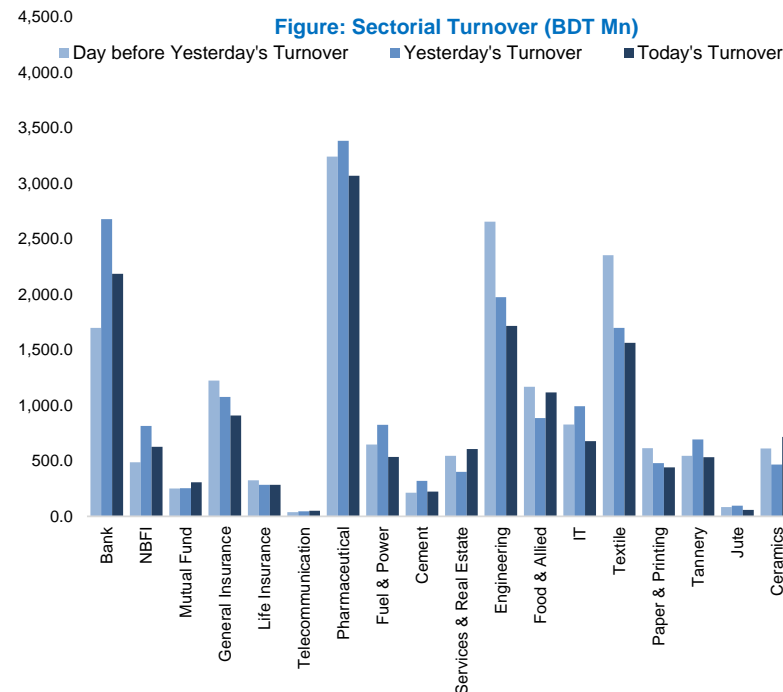
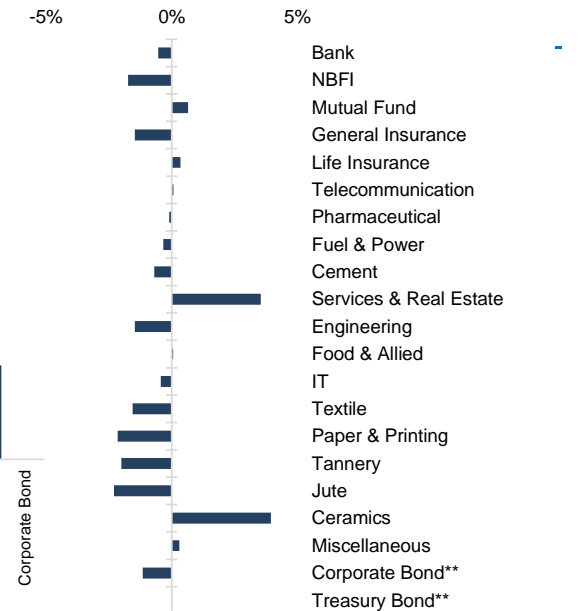


Figure: Sectorial Mcap Change



Market PE 18.6x

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	1,543	1,551	-8.30	-0.54%	35	727,735	9.4%	2,183.9	13.3%	13.3x	0.8x	GP	386,996	8.7%	2.0	12.5x	6.4x
NBFI	1,605	1,633	-28.36	-1.74%	23	157,711	2.0%	625.6	3.8%	NM	NM	BATBC	280,098	6.3%	0.3	15.4x	5.2x
Mutual Fund	833	828	+5.36	+0.65%	37	39,417	0.5%	307.2	1.9%	NM	0.8x	WALTONHIL	240,495	5.4%	8.2	21.7x	2.3x
General Insurance	3,733	3,788	-55.58	-1.47%	42	109,070	1.4%	907.3	5.5%	20.3x	1.7x	SQURPHARMA	194,487	4.4%	107.0	9.9x	1.7x
Life Insurance	2,432	2,423	+8.29	+0.34%	16	68,468	0.9%	283.2	1.7%	NM	NM	ROBI	157,138	3.5%	0.8	52.6x	2.4x
Telecommunication	4,881	4,878	+3.09	+0.06%	3	572,679	7.4%	50.4	0.3%	15.9x	4.1x	RENATA	114,364	2.6%	69.2	54.0x	3.6x
Pharmaceutical	3,711	3,715	-3.88	-0.10%	33	717,265	9.3%	3,068.8	18.6%	19.7x	2.2x	UPGDCL	105,447	2.4%	6.0	15.4x	3.4x
Fuel & Power	1,472	1,477	-4.93	-0.33%	23	384,416	5.0%	534.6	3.2%	26.4x	0.9x	BEXIMCO	103,842	2.3%	0.1	NM	1.2x
Cement	2,654	2,673	-18.55	-0.69%	7	128,079	1.7%	223.9	1.4%	16.8x	2.7x	BERGERPBL	89,519	2.0%	15.4	27.5x	6.7x
Services & Real Estate	1,839	1,776	+62.81	+3.54%	9	103,000	1.3%	606.9	3.7%	26.1x	0.8x	LHBL	85,361	1.9%	127.8	13.4x	4.0x
Engineering	3,761	3,817	-56.13	-1.47%	42	442,644	5.7%	1,715.6	10.4%	20.1x	1.5x	BRACBANK	66,445	1.5%	81.7	8.9x	1.0x
Food & Allied	21,365	21,352	+12.70	+0.06%	21	397,991	5.1%	1,116.9	6.8%	20.3x	6.6x	BXPHARMA	64,686	1.5%	90.3	13.2x	1.4x
IT	3,269	3,284	-14.40	-0.44%	11	42,625	0.6%	677.3	4.1%	35.4x	2.8x	BEACONPHAR	62,601	1.4%	221.6	94.8x	9.9x
Textile	1,502	1,526	-23.78	-1.56%	58	155,546	2.0%	1,563.0	9.5%	NM	1.0x	ICB	60,795	1.4%	6.7	NM	1.4x
Paper & Printing	10,195	10,419	-224.11	-2.15%	6	39,279	0.5%	440.1	2.7%	57.6x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	2,946	3,007	-60.27	-2.00%	6	33,357	0.4%	531.3	3.2%	44.0x	3.1x	DUTCHBANGL	43,978	1.0%	10.7	8.0x	1.0x
Jute	19,031	19,480	-448.16	-2.30%	3	4,432	0.1%	57.9	0.4%	NM	NM	BESTHLDNG	40,780	0.9%	6.1	30.9x	0.7x
Ceramics	678	652	+25.70	+3.94%	5	31,351	0.4%	714.8	4.3%	52.2x	1.9x	UNILEVERCL	40,651	0.9%	2.9	41.1x	19.6x
Miscellaneous	4,639	4,625	+14.07	+0.30%	14	253,441	3.3%	846.4	5.1%	41.1x	2.0x	EBL	37,545	0.8%	20.9	6.6x	1.0x
Corporate Bond**	4,302	4,352	-50.28	-1.16%	13	43,139	0.6%	0.1	0.0%	NM	NM	POWERGRID	32,928	0.7%	19.2	NM	0.3x
Treasury Bond**	86	86	+0.01	+0.01%	241	3,279,597	42.4%	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
MITHUNKNIT	22.0	+10.0%	16.3	NM	6.9x	SQURPHARMA	121,789	7.1%	9.9x	1.7x	ORIONPHARM	90.6	+4.4%	617.0	20.1x	1.0x
SBACBANK	12.1	+10.0%	101.9	9.3x	0.9x	BATBC	74,086	4.3%	15.4x	5.2x	BSC	132.6	+4.4%	515.1	9.3x	1.5x
BESTHLDNG	38.5	+10.0%	6.1	30.9x	0.7x	BEXIMCO	69,196	4.0%	NM	1.2x	IFIC	14.2	-4.1%	492.6	8.5x	0.8x
LOVELLO	42.2	+9.9%	232.5	39.1x	3.4x	RENATA	68,042	4.0%	54.0x	3.6x	FORTUNE	62.2	-4.9%	490.6	59.6x	4.0x
AFTABAUTO	57.8	+9.9%	218.4	NM	1.1x	BXPHARMA	45,564	2.7%	13.2x	1.4x	FUWANGCER	26.1	+9.7%	450.8	96.7x	2.2x
SICL	37.2	+9.7%	0.2	NM	NM	GP	38,700	2.3%	12.5x	6.4x	ABBANK	13.4	+3.1%	399.7	15.5x	0.5x
FUWANGCER	26.1	+9.7%	450.8	96.7x	2x	BEACONPHAR	34,036	2.0%	94.8x	9.9x	ORIONINFU	708.6	+2.8%	358.3	NM	48.8x
EBL1STMF	6.1	+8.9%	2.0	NM	0.7x	ISLAMIBANK	33,649	2.0%	8.5x	0.7x	MALEKSPIN	39.2	-	354.9	17.4x	0.8x
AL-HAJTEX	156.6	+8.5%	56.6	NM	17.3x	BRACBANK	30,964	1.8%	8.9x	1.0x	CENTRALPHL	26.4	-5.7%	346.3	NM	4.9x
RELIANCE1	17.0	+8.3%	57.6	NM	1.6x	LHBL	28,853	1.7%	13.4x	4.0x	ADVENT	34.0	+5.6%	327.7	34.7x	2.2x

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)
FAMILYTEX	4.4	-6.4%	9.4	NM	0.4x	PUBALIBANK	18,457	1.1%	4.7x	0.6x	KARNAPHULI	62.0	57.0	7.0	1,368	83.13
EIL	44.8	-6.3%	90.0	38.6x	2x	CITYBANK	18,190	1.1%	5.4x	0.8x	GP	275.0	261.6	38.0	202	53.08
NURANI	6.2	-6.1%	2.7	NM	0.7x	OLYMPIC	16,818	1.0%	18.1x	3.0x	BSC	132.4	126.0	4.0	370	48.80
KPPL	43.1	-5.9%	280.2	NM	NM	ROBI	15,714	0.9%	52.6x	2.4x	LOVELLO	38.0	36.5	7.0	1,220	44.67
CENTRALPHL	26.4	-5.7%	346.3	NM	4.9x	BSRMLTD	14,210	0.8%	4.5x	0.6x	CONTININS	42.0	42.0	1.0	845	35.50
CRYSTALINS	107.5	-5.6%	22.6	35.1x	4.3x	PRIMEBANK	13,962	0.8%	5.6x	0.8x	FORTUNE	63.0	61.0	2.0	445	27.95
BIFC	8.4	-5.6%	0.9	NM	NM	UPGDCL	13,547	0.8%	15.4x	3.4x	NBL	8.6	8.6	1.0	3,000	25.80
ILFSL	7.0	-5.4%	20.4	NM	NM	SUMITPOWER	13,369	0.8%	10.3x	0.8x	BEACONPHAR	259.0	258.0	2.0	89	23.07
ARAMITCEM	32.9	-5.2%	30.0	NM	NM	ALARABANK	13,112	0.8%	12.7x	1.1x	CITYGENINS	66.1	63.0	4.0	345	22.73
KARNAPHULI	55.7	-4.9%	102.8	33.0x	2.6x						ADNTEL	135.0	135.0	3.0	136	18.36

* 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
KARNAPHULI	62.0	57.0	83.1	1,368	7
GP	275.0	261.6	53.1	202	38
BSC	132.4	126.0	48.8	370	4
LOVELLO	38.0	36.5	44.7	1,220	7
CONTININS	42.0	42.0	35.5	845	1
FORTUNE	63.0	61.0	27.9	445	2
NBL	8.6	8.6	25.8	3,000	1
BEACONPHAR	259.0	258.0	23.1	89	2
CITYGENINS	66.1	63.0	22.7	345	4
ADNTEL	135.0	135.0	18.4	136	3
BEACHHATCH	67.5	66.8	16.5	246	3
KPPL	50.0	49.9	6.0	120	2
MEGHNALIFE	78.3	78.3	5.5	70	1
EIL	49.5	49.2	5.2	106	5
ROBI	27.3	27.0	4.9	180	8
DESHBANDHU	46.2	46.2	4.6	100	1
IFIC	14.7	14.5	4.6	315	2
NCCBLMF1	9.0	8.7	4.5	520	3
NAVANAPHAR	108.3	108.3	3.8	35	1
SONALIPAPR	560.0	560.0	2.8	5	1
ESQUIRENIT	27.0	27.0	2.7	100	1
AFTABAUTO	55.0	53.2	2.6	49	2
Total			476.3		134

Upcoming Corporate Events

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

Important DSE News
PRAGATIINS

The company has informed that the Board of Directors of the company in its meeting held on 11th February, 2024 has decided to rent 24,672 Square feet Shed and Premises situated at 113 C.R Dutta Road, Panthapath, Dhaka to Pragati Life Insurance Limited on the following terms and conditions: 1. Period of Rent: 10 (ten) years with effect from 1st April, 2024 to 31st March, 2034 (renewable), 2. Monthly Rent: Total Tk. 3,58,000.00 (Tk. Three Lakh Fifty-Eight Thousand) only inclusive of VAT and Tax, 3. Pragati Life Insurance Ltd. will pay an advance rent of Tk. 1,12,00,000.00 (Tk. One crore Twelve lac) which will be adjusted from monthly rent.

PRAGATILIF

The company has informed that the Board of Directors of the company in its meeting held on 11th February, 2024 has decided to take rent of 24,672 Square feet Shed and Premises situated at Pragati Insurance Ltd., 113 C.R Dutta Road, Panthapath, Dhaka for company store and customer service center on the following terms and conditions: 1. Period of Rent: 10 (ten) years with effect from 1st April, 2024 to 31st March, 2034 (renewable), 2. Monthly Rent: Total Tk. 3,58,000.00 (Tk. Three Lakh Fifty-Eight Thousand) will be paid as rent inclusive of VAT and Taxes, 3. Tk. 1,12,00,000.00 (Tk. One crore Twelve lac) will be paid as advance which will be adjusted from monthly rent.

RENATA

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Renata PLC' instead of 'Renata Limited' with effect from February 13, 2024. Other things (except name) will remain unchanged.

APEXFOOT

Mr. Syed Manzur Elahi, one of the Sponsor Directors of the Company, has expressed his intention to buy 11,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. within next 30 working days.

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