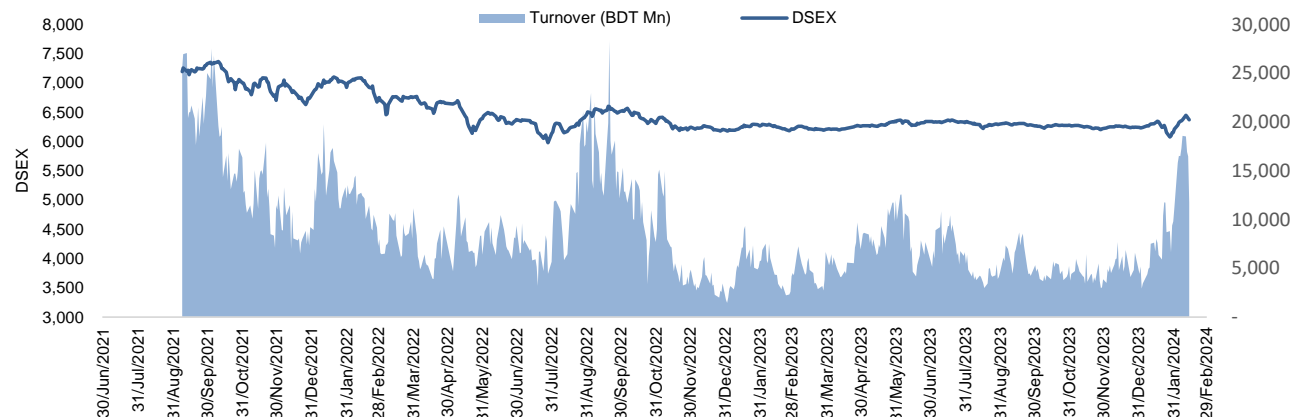


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.36%) lost 23.27 points and closed at 6,371.54. The blue-chip index DS30 (+0.04%), the Shariah-based index DSES (-0.01%), and the large-cap index CDSET (-0.27%) closed at 2,172.35, 1,391.04, and 1,205.55 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.00% followed by Bank (-1.15%), Fuel & Power (-0.79%), Engineering (-0.60%), Food & Allied (-0.16%), Telecommunication (-0.03%), and Pharmaceutical (+0.03%), respectively. Block trades contributed 3.5% of the overall market turnover. Best Holdings Limited (+1.9%) was the most traded share with a turnover of BDT 1,214 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,371.54	6,394.82	-23.27	-0.36%	+2.0%
DS30	2,172.35	2,171.53	+0.82	+0.04%	+3.7%
DSES	1,391.04	1,391.24	-0.20	-0.01%	+2.0%
CDSET	1,205.55	1,208.83	-3.28	-0.27%	+0.2%

	Advanced	Declined	Unchanged	Total
All Category	79	278	38	395
A Category (Equity)	37	175	27	239
B Category (Equity)	31	93	5	129
N Category (Equity)	2	0	1	3
Z Category (Equity)	9	10	5	24
Mutual Funds	4	28	5	37
Corporate Bonds	1	1	2	4
Treasury Bonds	0	1	0	1

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,699,826	7,718,724	-0.2%
	Mn USD	69,998	70,170	
Turnover	Mn BDT	11,736	16,464	-28.7%
	Mn USD	107	150	
Volume	Mn Shares	351	512	-31.5%
No. of Trade		301,506	347,337	-13.2%

\* Average Interbank Exchange Rate is BDT 110.00 as of Feb 14, 2024

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Figure: Sectorial Turnover (BDT Mn)

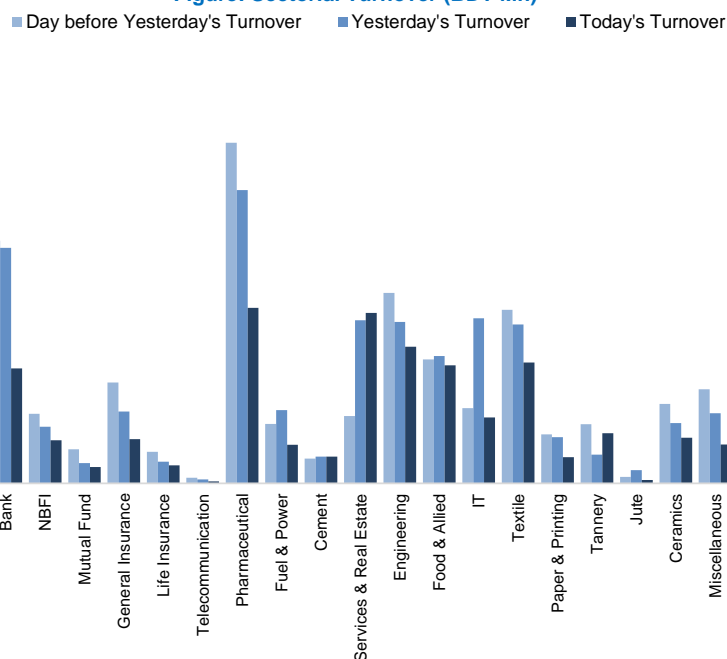
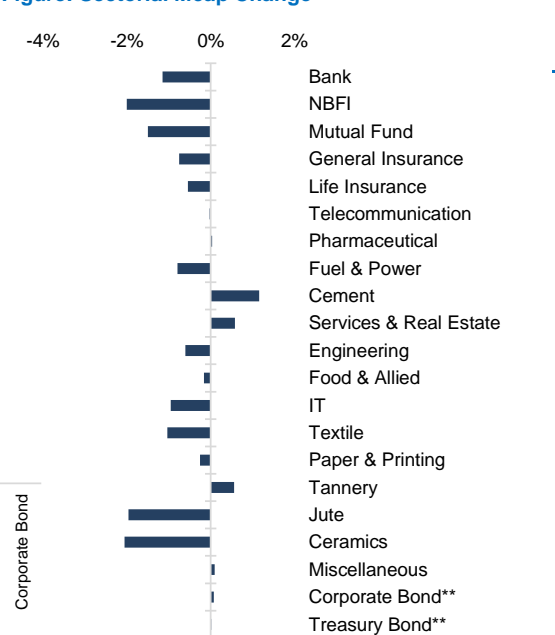


Figure: Sectorial Mcap Change



Market PE 18.5x

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	1,508	1,526	-17.54	-1.15%	35	711,568	9.3%	1,035.1	9.1%	13.0x	0.7x	GP	386,996	8.8%	0.8	12.5x	6.4x
NBFI	1,543	1,574	-31.49	-2.00%	23	151,564	2.0%	387.2	3.4%	NM	NM	BATBC	280,098	6.4%	0.7	15.4x	5.2x
Mutual Fund	805	817	-12.22	-1.49%	37	38,073	0.5%	148.0	1.3%	NM	0.7x	WALTONHIL	236,557	5.4%	3.6	21.3x	2.3x
General Insurance	3,654	3,682	-27.54	-0.75%	42	106,777	1.4%	398.9	3.5%	19.8x	1.7x	SQURPHARMA	195,197	4.4%	74.2	10.0x	1.7x
Life Insurance	2,393	2,406	-12.99	-0.54%	16	67,382	0.9%	163.1	1.4%	NM	NM	ROBI	157,138	3.6%	0.5	52.6x	2.4x
Telecommunication	4,874	4,875	-1.41	-0.03%	3	571,789	7.4%	17.5	0.2%	15.8x	4.1x	RENATA	115,511	2.6%	37.4	54.6x	3.6x
Pharmaceutical	3,683	3,682	+1.29	+0.03%	33	711,979	9.3%	1,581.0	14.0%	19.5x	2.2x	UPGDCL	104,055	2.4%	3.6	15.2x	3.4x
Fuel & Power	1,459	1,471	-11.64	-0.79%	23	380,977	5.0%	348.1	3.1%	26.1x	0.9x	BEXIMCO	103,842	2.4%	0.0	NM	1.2x
Cement	2,680	2,650	+30.64	+1.16%	7	129,328	1.7%	241.9	2.1%	17.0x	2.7x	BERGERPBL	89,375	2.0%	0.0	27.5x	6.7x
Services & Real Estate	1,910	1,899	+10.96	+0.58%	9	107,013	1.4%	1,535.9	13.6%	27.1x	0.8x	LHBL	86,174	2.0%	133.0	13.6x	4.0x
Engineering	3,688	3,710	-22.31	-0.60%	42	433,987	5.6%	1,231.6	10.9%	19.7x	1.4x	BRACBANK	68,858	1.6%	119.8	9.2x	1.1x
Food & Allied	21,343	21,378	-34.48	-0.16%	21	397,584	5.2%	1,063.5	9.4%	20.3x	6.6x	BEACONPHAR	63,271	1.4%	137.0	95.8x	10.0x
IT	3,300	3,332	-31.70	-0.95%	11	43,029	0.6%	593.5	5.2%	35.8x	2.8x	BXPHARMA	62,768	1.4%	40.2	12.8x	1.4x
Textile	1,468	1,483	-15.29	-1.03%	58	152,028	2.0%	1,087.1	9.6%	NM	1.0x	ICB	58,800	1.3%	4.0	NM	1.4x
Paper & Printing	10,181	10,208	-26.14	-0.26%	6	39,228	0.5%	236.0	2.1%	57.5x	1.9x	ISLAMIBANK	52,486	1.2%	0.1	8.5x	0.7x
Tannery	2,944	2,928	+16.46	+0.56%	6	33,333	0.4%	451.7	4.0%	43.9x	3.1x	BESTHLDNG	45,653	1.0%	1,214.0	34.6x	0.8x
Jute	18,651	19,024	-372.94	-1.96%	3	4,343	0.1%	30.2	0.3%	NM	NM	DUTCHBANGL	43,978	1.0%	3.7	8.0x	1.0x
Ceramics	645	658	-13.55	-2.06%	5	29,820	0.4%	411.1	3.6%	49.6x	1.8x	UNILEVERCL	40,952	0.9%	4.2	41.4x	19.8x
Miscellaneous	4,666	4,662	+4.34	+0.09%	14	254,919	3.3%	350.5	3.1%	41.3x	2.0x	EBL	37,183	0.8%	12.6	6.6x	1.0x
Corporate Bond**	4,307	4,304	+3.24	+0.08%	13	43,197	0.6%	0.6	0.0%	NM	NM	POWERGRID	34,211	0.8%	25.9	NM	0.3x
Treasury Bond**	86	86	+0.01	+0.01%	240	3,279,267	42.7%	12.4	0.1%	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
CENTRALPHL	27.5	+10.0%	153.0	NM	5.1x	SQURPHARMA	121,789	7.1%	10.0x	1.7x	BESTHLDNG	43.1	+1.9%	1,214.0	34.6x	0.8x
SICL	44.9	+9.8%	8.0	NM	NM	BATBC	74,086	4.3%	15.4x	5.2x	LOVELLO	45.6	-1.7%	506.2	42.2x	3.6x
KPPL	43.8	+9.8%	114.1	NM	NM	BEXIMCO	69,196	4.0%	NM	1.2x	FORTUNE	61.3	+1.5%	424.2	58.7x	4.0x
MEGCONMILK	28.3	+9.7%	6.7	NM	NM	RENATA	68,042	4.0%	54.6x	3.6x	FUWANGCER	23.9	-3.2%	289.2	88.5x	2.0x
SAFKOSPIN	19.4	+9.6%	27.7	NM	2.3x	BXPHARMA	45,564	2.7%	12.8x	1.4x	ORIONINFU	701.7	-0.1%	283.8	NM	48.3x
ANLIMAYARN	40.2	+7.8%	40.5	NM	3.9x	GP	38,700	2.3%	12.5x	6.4x	ORIONPHARM	85.0	-2.4%	280.8	18.9x	0.9x
BIFC	8.7	+7.4%	0.6	NM	NM	BEACONPHAR	34,036	2.0%	95.8x	10.0x	AFTABAUTO	60.3	+6.9%	272.5	NM	1.2x
AFTABAUTO	60.3	+6.9%	272.5	NM	1.2x	ISLAMIBANK	33,649	2.0%	8.5x	0.7x	MALEKSPIN	37.2	-4.6%	223.5	16.5x	0.7x
ADNTEL	138.0	+6.4%	115.5	NM	4.5x	BRACBANK	30,964	1.8%	9.2x	1.1x	IFIC	13.4	-2.9%	204.9	8.0x	0.7x
HEIDELCEM	263.9	+6.1%	62.8	29.1x	3.9x	LHBL	28,853	1.7%	13.6x	4.0x	ABBANK	12.6	-0.8%	178.0	14.6x	0.4x
						NBL	19,116	1.1%	NM	0.8x						
						PUBALIBANK	18,457	1.1%	4.6x	0.6x						
						CITYBANK	18,190	1.1%	5.3x	0.7x						
						OLYMPIC	16,818	1.0%	18.1x	3.0x						
						ROBI	15,714	0.9%	52.6x	2.4x						
						BSRMLTD	14,210	0.8%	4.5x	0.6x						
						PRIMEBANK	13,962	0.8%	5.4x	0.7x						
						UPGDCL	13,547	0.8%	15.2x	3.4x						
						SUMITPOWER	13,369	0.8%	10.0x	0.7x						
						ALARABANK	13,112	0.8%	12.6x	1.1x						
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)
MONNOFABR	21.8	-8.0%	46.0	NM	0.9x						ADNTEL	135.0	116.8	10.0	1,382	163.49
MITHUNKNIT	22.6	-6.6%	50.8	NM	7x						FORTUNE	66.0	60.0	8.0	950	58.64
GSPFINANCE	18.8	-6.5%	47.9	NM	0.8x						BEACONPHAR	293.5	293.5	1.0	135	39.65
AGNISYSL	29.1	-6.1%	97.9	28.5x	1.8x						GP	285.8	261.6	39.0	84	22.80
RDFOOD	40.6	-5.8%	97.4	28.8x	2.4x						AIL	82.5	75.5	7.0	257	20.92
ITC	54.3	-5.7%	148.5	19.5x	2.8x						UNIONCAP	14.0	13.6	15.0	1,138	15.91
SBACBANK	11.4	-5.0%	33.2	9.1x	0.8x						MARICO	2,550.0	2,550.0	1.0	6	15.30
FAMILYTEX	4.0	-4.8%	6.1	NM	0.4x						KARNAPHULI	55.5	51.0	3.0	212	11.66
ADVENT	30.4	-4.7%	133.6	31.0x	2.0x						ORIONPHARM	90.0	90.0	1.0	120	10.80
MALEKSPIN	37.2	-4.6%	223.5	16.5x	0.7x						KBPPWBIL	210.0	203.0	3.0	25	5.09

\* 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
ADNTEL	135.0	116.8	163.5	1,382	10
FORTUNE	66.0	60.0	58.6	950	8
BEACONPHAR	293.5	293.5	39.7	135	1
GP	285.8	261.6	22.8	84	39
AIL	82.5	75.5	20.9	257	7
UNIONCAP	14.0	13.6	15.9	1,138	15
MARICO	2,550.0	2,550.0	15.3	6	1
KARNAPHULI	55.5	51.0	11.7	212	3
ORIONPHARM	90.0	90.0	10.8	120	1
KBPPWBIL	210.0	203.0	5.1	25	3
AFTABAUTO	62.0	55.8	3.6	60	4
BDTHAI	33.0	33.0	3.3	101	1
AGNISYSL	31.0	30.6	2.8	90	2
BESTHLDNG	46.5	46.5	2.4	52	4
LOVELLO	42.0	42.0	2.3	55	2
NAVANAPHAR	98.0	98.0	2.2	23	1
METROSPIN	21.7	21.7	2.2	100	1
INTRACO	45.4	45.1	2.2	48	2
ROBI	27.2	27.0	1.9	69	2
UNIQUEHRL	55.9	55.9	1.8	32	1
IPDC	33.5	33.5	1.7	50	1
BEXIMCO	104.3	104.3	1.6	15	1
<b>Total</b>			<b>411.3</b>		<b>137</b>

**Upcoming Corporate Events**

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

**Important DSE News**
**SBACBANK**

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'SBAC Bank PLC.' instead of 'South Bangla Agriculture & Commerce Bank Limited' with effect from February 15, 2024. Other things (except name) will remain unchanged.

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