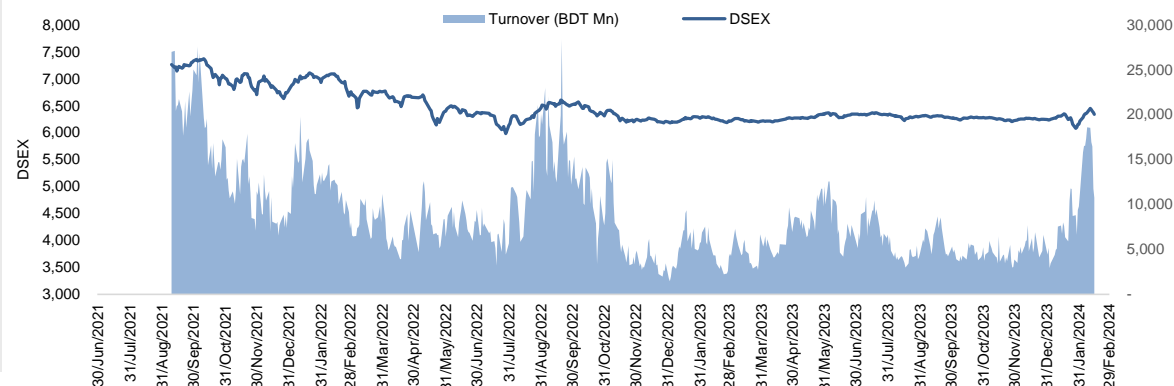


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.55%) lost 35.29 points and closed at 6,336.25. The blue-chip index DS30 (-0.70%), the Shariah-based index DSES (-0.63%), and the large-cap index CDSET (-0.34%) closed at 2,157.06, 1,382.22, and 1,201.45 points, respectively. Most of the large-cap sectors posted negative performance today. NBFI experienced the highest loss of 1.40% followed by Pharmaceutical (-0.82%), Bank (-0.71%), Engineering (-0.54%), Fuel & Power (-0.46%), Food & Allied (-0.06%), and Telecommunication (-0.06%), respectively. Block trades contributed 2.7% of the overall market turnover. Orion Infusion Ltd. (-4.9%) was the most traded share with a turnover of BDT 837 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,336.25	6,371.54	-35.29	-0.55%	+1.4%
DS30	2,157.06	2,172.35	-15.29	-0.70%	+3.0%
DSES	1,382.22	1,391.04	-8.82	-0.63%	+1.3%
CDSET	1,201.45	1,205.55	-4.10	-0.34%	-0.1%

	Advanced	Declined	Unchanged	Total
All Category	90	252	54	396
A Category (Equity)	53	157	30	240
B Category (Equity)	25	86	18	129
N Category (Equity)	1	1	1	3
Z Category (Equity)	11	8	5	24
Mutual Funds	3	26	8	37
Corporate Bonds	0	1	2	3
Treasury Bonds	0	3	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,664,669	7,699,826	-0.5%
	Mn USD	69,679	69,998	
Turnover	Mn BDT	10,747	11,736	-8.4%
	Mn USD	98	107	
Volume	Mn Shares	303	351	-13.6%
No. of Trade		329,689	301,506	+9.3%

* Average Interbank Exchange Rate is BDT 110.00 as of Feb 15, 2024

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Figure: Sectorial Turnover (BDT Mn)

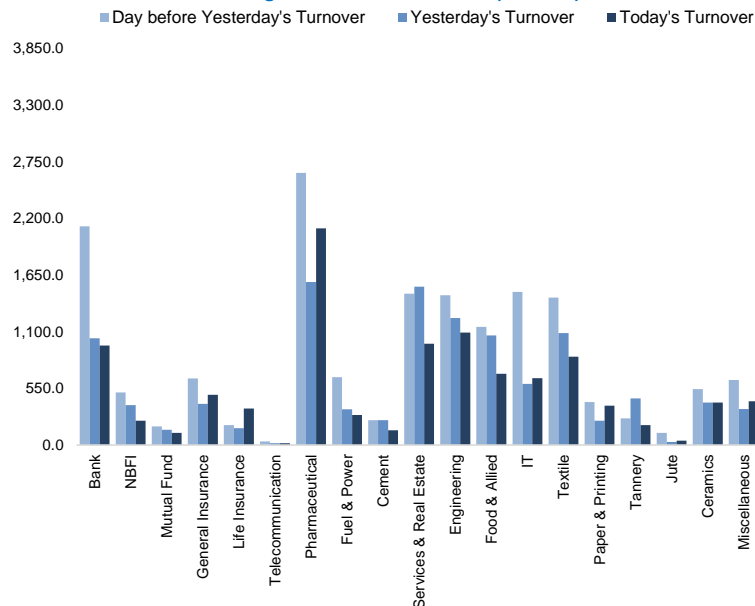
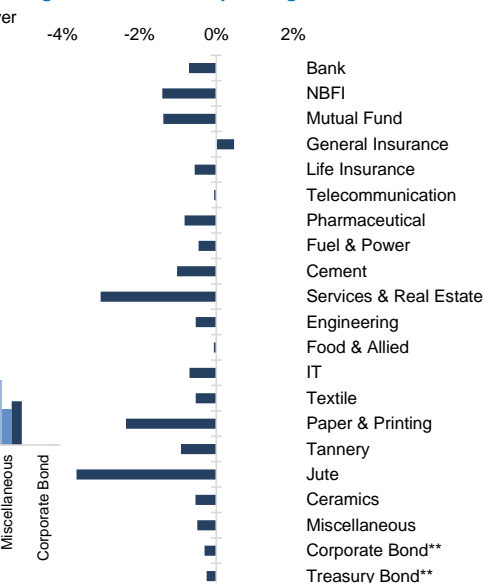


Figure: Sectorial Mcap Change



Market PE 18.2x

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	1,498	1,508	-10.67	-0.71%	35	706,532	9.2%	965.7	9.2%	12.9x	0.7x	GP	386,996	8.9%	0.4	11.7x	5.8x
NBFI	1,521	1,543	-21.59	-1.40%	23	149,442	2.0%	236.9	2.3%	NM	NM	BATBC	280,098	6.4%	0.1	15.7x	5.2x
Mutual Fund	794	805	-11.07	-1.38%	37	37,549	0.5%	118.8	1.1%	NM	0.7x	WALTONHIL	235,315	5.4%	3.8	21.2x	2.2x
General Insurance	3,671	3,654	+16.95	+0.46%	42	107,272	1.4%	487.9	4.7%	19.6x	1.7x	SQRPHARMA	195,019	4.5%	46.9	9.9x	1.7x
Life Insurance	2,380	2,393	-13.34	-0.56%	16	67,006	0.9%	355.4	3.4%	NM	NM	ROBI	157,138	3.6%	3.0	52.6x	2.4x
Telecommunication	4,871	4,874	-2.81	-0.06%	3	571,459	7.5%	17.2	0.2%	14.9x	3.9x	RENATA	112,965	2.6%	19.3	53.4x	3.6x
Pharmaceutical	3,653	3,683	-30.33	-0.82%	33	706,116	9.2%	2,101.4	20.1%	19.4x	2.2x	BEXIMCO	103,842	2.4%	0.0	NM	1.2x
Fuel & Power	1,453	1,459	-6.70	-0.46%	23	379,229	5.0%	291.2	2.8%	26.0x	0.9x	UPGDCL	102,896	2.4%	2.0	15.0x	3.3x
Cement	2,653	2,680	-27.33	-1.02%	7	128,009	1.7%	143.5	1.4%	16.8x	2.7x	BERGERPBL	88,137	2.0%	16.2	27.1x	6.6x
Services & Real Estate	1,853	1,910	-57.47	-3.01%	9	103,794	1.4%	984.1	9.4%	26.3x	0.8x	LHBL	85,361	2.0%	94.0	13.4x	4.0x
Engineering	3,668	3,688	-19.77	-0.54%	42	431,661	5.6%	1,091.8	10.4%	19.6x	1.4x	BRACBANK	69,180	1.6%	81.7	9.2x	1.1x
Food & Allied	21,330	21,343	-13.53	-0.06%	21	397,332	5.2%	692.7	6.6%	20.6x	6.6x	BEACONPHAR	62,532	1.4%	230.2	94.7x	9.9x
IT	3,277	3,300	-22.97	-0.70%	11	42,729	0.6%	649.7	6.2%	35.5x	2.8x	BXPBARMA	62,054	1.4%	14.6	12.6x	1.4x
Textile	1,460	1,468	-7.79	-0.53%	58	151,222	2.0%	858.4	8.2%	NM	1.0x	ICB	57,846	1.3%	3.4	NM	1.4x
Paper & Printing	9,943	10,181	-238.89	-2.35%	6	38,308	0.5%	381.0	3.6%	56.2x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	2,917	2,944	-27.01	-0.92%	6	33,028	0.4%	192.5	1.8%	43.5x	3.0x	BESTHLDNG	43,323	1.0%	731.3	32.9x	0.8x
Jute	17,974	18,651	-677.36	-3.63%	3	4,185	0.1%	42.3	0.4%	NM	NM	DUTCHBANGL	43,230	1.0%	3.0	7.8x	1.0x
Ceramics	641	645	-3.46	-0.54%	5	29,660	0.4%	412.0	3.9%	43.0x	1.7x	UNILEVERCL	40,877	0.9%	3.2	41.3x	19.7x
Miscellaneous	4,644	4,666	-22.97	-0.49%	14	253,664	3.3%	425.6	4.1%	41.1x	2.0x	EBL	36,941	0.8%	14.2	6.5x	1.0x
Corporate Bond**	4,294	4,307	-13.16	-0.31%	13	43,065	0.6%	1.5	0.0%	NM	NM	POWERGRID	34,852	0.8%	29.3	NM	0.3x
Treasury Bond**	86	86	-0.22	-0.25%	240	3,271,053	42.7%	11.1	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
FAMILYTEX	4.4	+10.0%	9.6	NM	0.4x	SQRPHARMA	121,789	7.1%	9.9x	1.7x	ORIONINFU	667.0	-4.9%	836.7	NM	45.9x
SICL	49.3	+9.8%	260.5	NM	NM	BATBC	74,086	4.3%	15.7x	5.2x	BESTHLDNG	40.9	-5.1%	731.3	32.9x	0.8x
MITHUNKNIT	24.8	+9.7%	25.2	NM	7.8x	BEXIMCO	69,196	4.0%	NM	1.2x	AFTABAUTO	61.9	+2.7%	318.6	NM	1.2x
STYLECRAFT	78.5	+9.6%	8.7	NM	8.3x	RENATA	68,042	4.0%	53.4x	3.6x	CENTRALPHL	26.9	-2.2%	309.1	NM	4.9x
MONNOFABR	23.9	+9.6%	101.5	NM	0.9x	BXPBARMA	45,564	2.7%	12.6x	1.4x	FUWANGCER	26.0	+8.8%	308.6	96.3x	2.2x
FUWANGCER	26.0	+8.8%	308.6	96.3x	2.2x	GP	38,700	2.3%	11.7x	5.8x	KPPL	43.1	-1.6%	275.7	NM	NM
MEGHNA PET	37.1	+5.1%	10.9	NM	NM	BEACONPHAR	34,036	2.0%	94.7x	9.9x	SICL	49.3	+9.8%	260.5	NM	NM
BDLAMP	174.0	+4.8%	9.5	NM	2.5x	ISLAMIBANK	33,649	2.0%	8.5x	0.7x	ABBANK	12.7	+0.8%	252.4	14.7x	0.4x
ITC	56.9	+4.8%	230.9	20.4x	2.9x	BRACBANK	30,964	1.8%	9.2x	1.1x	ITC	56.9	+4.8%	230.9	20.4x	2.9x
KARNAPHULI	58.6	+4.6%	112.1	34.7x	2.8x	LHBL	28,853	1.7%	13.4x	4.0x	BEACONPHAR	270.7	-1.2%	230.2	94.7x	9.9x

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)
VAMLRBBF	6.3	-7.4%	2.2	NM	0.7x	PUBALIBANK	18,457	1.1%	4.6x	0.6x	FORTUNE	66.0	63.9	5.0	870	57.27
AAMRANET	52.1	-7.0%	104.4	14.0x	1x	CITYBANK	18,190	1.1%	5.2x	0.7x	BEACONPHAR	250.1	250.1	1.0	159	39.79
UNIONCAP	12.5	-5.3%	71.4	NM	NM	OLYMPIC	16,818	1.0%	18.1x	3.0x	MONNOCERA	90.0	90.0	1.0	400	36.00
RDFOOD	38.5	-5.2%	93.4	27.3x	2.3x	ROBI	15,714	0.9%	52.6x	2.4x	KARNAPHULI	57.4	56.3	6.0	570	32.40
BESTHLDNG	40.9	-5.1%	731.3	32.9x	0.8x	BSRMLTD	14,210	0.8%	4.5x	0.6x	ORIONINFU	699.0	670.0	3.0	39	27.08
ORIONINFU	667.0	-4.9%	836.7	NM	45.9x	PRIMEBANK	13,962	0.8%	5.4x	0.7x	GP	285.0	261.6	28.0	62	16.89
WMSHIPYARD	13.9	-4.8%	67.6	NM	0.7x	UPGDCL	13,547	0.8%	15.0x	3.3x	SONALIPAPR	564.0	550.0	3.0	21	11.70
BIFC	8.3	-4.6%	0.3	NM	NM	SUMITPOWER	13,369	0.8%	10.1x	0.8x	BEXIMCO	111.0	104.1	9.0	77	8.07
SONALIANS	616.6	-4.4%	41.2	49.5x	4.8x	ALARABANK	13,112	0.8%	12.6x	1.1x	DESHBANDHU	40.0	40.0	1.0	200	8.00
SKTRIMS	32.4	-4.1%	47.0	28.2x	2.0x						LOVELLO	44.0	41.1	6.0	110	4.61

* 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
FORTUNE	66.0	63.9	57.3	870	5
BEACONPHAR	250.1	250.1	39.8	159	1
MONNOCERA	90.0	90.0	36.0	400	1
KARNAPHULI	57.4	56.3	32.4	570	6
ORIONINFU	699.0	670.0	27.1	39	3
GP	285.0	261.6	16.9	62	28
SONALIPAPR	564.0	550.0	11.7	21	3
BEXIMCO	111.0	104.1	8.1	77	9
DESHBANDHU	40.0	40.0	8.0	200	1
LOVELLO	44.0	41.1	4.6	110	6
KBPPWBIL	212.2	210.0	4.5	22	3
NITOLINS	43.0	43.0	4.3	100	1
ROBI	28.4	27.0	4.2	153	8
RUPALIBANK	40.0	40.0	4.0	100	1
CENTRALINS	56.4	56.4	3.7	65	1
ADNTEL	151.4	128.0	3.3	24	4
BESTHLDNG	42.0	42.0	2.0	48	1
ORIONPHARM	93.0	83.6	1.9	22	2
FUWANGFOOD	34.0	34.0	1.7	50	1
ADVENT	33.0	30.5	1.6	51	2
BDCOM	39.7	39.7	1.6	40	1
SKTRIMS	34.0	34.0	1.4	40	1
Total			286.7		105

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
RAKCERAMIC		0.0%	10%	Record Date	19-Feb-24
IMAMBUTTON		0.0%	1%	Record Date	20-Feb-24
SINGERBD		0.0%	35%	Record Date	22-Feb-24
GP		0.0%	125%	Record Date	29-Feb-24
SKICL		0.0%	14%	Record Date	3-Mar-24
BATBC		0.0%	100%	Record Date	3-Mar-24
RELIANCINS		0.0%	25%	Record Date	6-Mar-24
GREENDELT		0.0%	25%	Record Date	6-Mar-24
BDTHAIFOOD		0.0%	1%	Record Date	7-Mar-24

Important DSE News

AAMRANET

Refer to their earlier news disseminated by DSE on 22.08.2023 regarding decision to raise Paid-up Capital through issuance of Rights Share, the company has further informed that Bangladesh Securities and Exchange Commission vide its letter No. BSEC/CI/RI-131/2023/47, dated February 14, 2024 has accorded approval for issuance of Rights Share of the company. The company will raise paid-up capital through issuance of 30,993,304 Ordinary Shares of Tk. 10.00 each at an issue price of Tk. 30.00 (including premium Tk. 20.00) totaling Tk. 929,799,120.00 offered on the basis of 01 (One) [R]: 02 (Two) i.e., 01 (One) rights share against 02 (Two) existing shares held on the record date. The record date and subscription period will be disseminated soon in accordance with the conditions of the aforesaid approval letter of BSEC.

LOVELLO

Mr. Md. Ekramul Haque, a Sponsor and also Managing Director of the Company, has expressed his intention to sell 30,00,000 shares out of his holding of 3,00,00,000 shares of the company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

MONNOCERA

Monno Welfare Foundation, a Corporate Director of the Company, has expressed its intention to sell 9,00,000 shares out of its holding of 8,939,077 shares of the Company at prevailing market price (In the Block Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 working days.

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