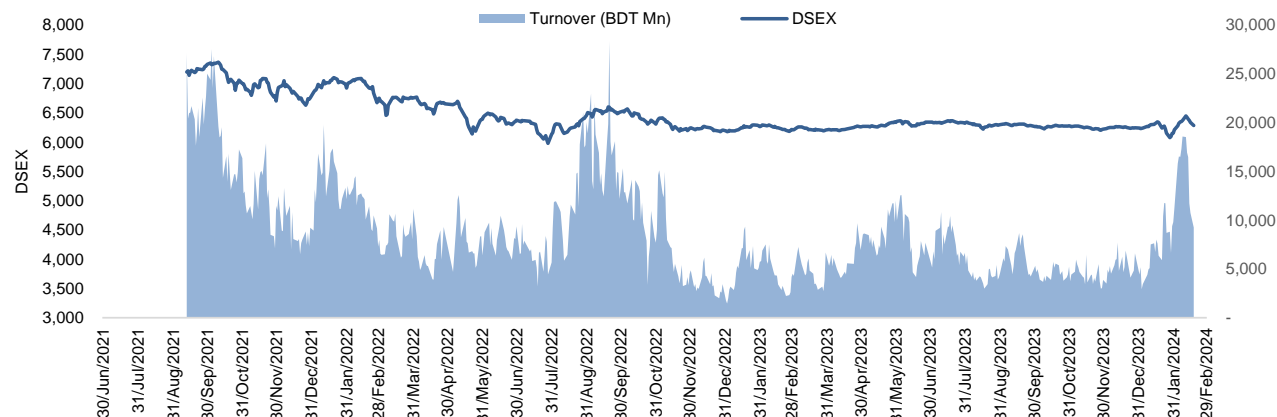


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.84%) lost 53.02 points and closed at 6,283.24. The blue-chip index DS30 (-1.29%), the Shariah-based index DSES (-0.97%), and the large-cap index CDSET (-0.95%) closed at 2,129.28, 1,368.83, and 1,190.06 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.44% followed by Pharmaceutical (-1.36%), Bank (-1.24%), Fuel & Power (-0.65%), Engineering (-0.50%), Food & Allied (+0.03%), and Telecommunication (+0.97%), respectively. Block trades contributed 4.8% of the overall market turnover. Best Holdings Limited (-4.4%) was the most traded share with a turnover of BDT 493 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,283.24	6,336.25	-53.02	-0.84%	+0.6%
DS30	2,129.28	2,157.06	-27.78	-1.29%	+1.7%
DSES	1,368.83	1,382.22	-13.39	-0.97%	+0.3%
CDSET	1,190.06	1,201.45	-11.39	-0.95%	-1.1%

	Advanced	Declined	Unchanged	Total
All Category	107	256	29	392
A Category (Equity)	76	136	22	234
B Category (Equity)	26	77	6	109
N Category (Equity)	1	2	0	3
Z Category (Equity)	4	41	1	46
Mutual Funds	2	24	11	37
Corporate Bonds	2	2	0	4
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

	Today	Last Day	Daily %Δ
Mcap	Mn BDT 7,646,318	7,664,669	-0.2%
	Mn USD 69,512	69,679	
Turnover	Mn BDT 9,247	10,747	-14.0%
	Mn USD 84	98	
Volume	Mn Shares 281	303	-7.4%
No. of Trade	275,568	329,689	-16.4%

\* Average Interbank Exchange Rate is BDT 110.00 as of Feb 18, 2024

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Figure: Sectorial Turnover (BDT Mn)

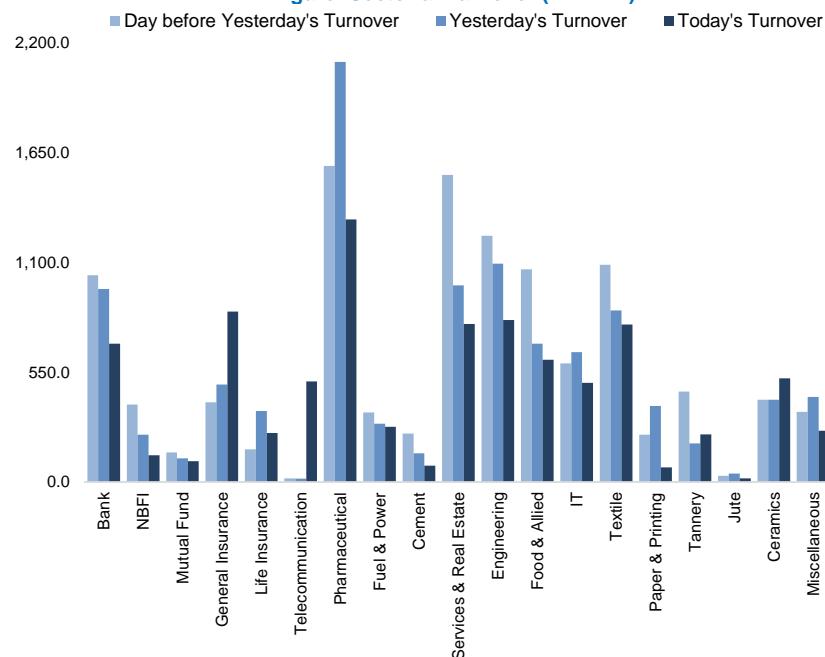
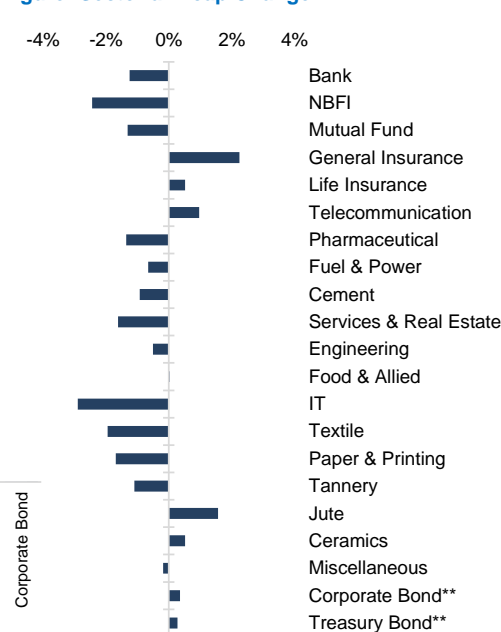


Figure: Sectorial Mcap Change



Market PE 18.1x

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	1,479	1,498	-18.58	-1.24%	35	697,769	9.1%	692.1	7.9%	12.7x	0.7x	GP	386,996	8.9%	1.4	11.7x	5.8x
NBFI	1,484	1,521	-37.07	-2.44%	23	145,800	1.9%	133.5	1.5%	NM	NM	BATBC	280,098	6.5%	0.3	15.7x	5.2x
Mutual Fund	784	794	-10.40	-1.31%	37	37,058	0.5%	103.4	1.2%	NM	0.7x	WALTONHIL	235,678	5.4%	3.1	21.3x	2.3x
General Insurance	3,754	3,671	+82.71	+2.25%	42	109,689	1.4%	852.2	9.7%	20.1x	1.7x	SQURPHARMA	192,803	4.4%	41.9	9.8x	1.6x
Life Insurance	2,392	2,380	+12.38	+0.52%	16	67,355	0.9%	244.9	2.8%	NM	NM	ROBI	163,424	3.8%	476.6	51.1x	2.4x
Telecommunication	4,918	4,871	+47.11	+0.97%	3	576,986	7.6%	503.2	5.7%	15.0x	3.9x	RENATA	112,162	2.6%	21.0	53.0x	3.5x
Pharmaceutical	3,604	3,653	-49.55	-1.36%	33	696,537	9.1%	1,314.2	14.9%	19.1x	2.1x	BEXIMCO	103,842	2.4%	0.0	NM	1.2x
Fuel & Power	1,443	1,453	-9.46	-0.65%	23	376,758	4.9%	276.8	3.1%	25.9x	0.9x	UPGDCL	101,679	2.3%	3.6	14.8x	3.3x
Cement	2,628	2,653	-24.54	-0.92%	7	126,825	1.7%	82.0	0.9%	16.6x	2.7x	BERGERPBL	88,225	2.0%	11.4	27.1x	6.6x
Services & Real Estate	1,823	1,853	-29.80	-1.61%	9	102,124	1.3%	791.3	9.0%	25.8x	0.8x	LHBL	84,896	2.0%	53.8	13.4x	4.0x
Engineering	3,649	3,668	-18.39	-0.50%	42	429,496	5.6%	810.6	9.2%	19.5x	1.4x	BRACBANK	66,927	1.5%	45.6	8.9x	1.0x
Food & Allied	21,336	21,330	+5.92	+0.03%	21	397,442	5.2%	611.5	6.9%	20.6x	6.6x	BXPHARMA	61,296	1.4%	9.4	12.5x	1.4x
IT	3,183	3,277	-94.80	-2.89%	11	41,493	0.5%	495.4	5.6%	34.5x	2.7x	BEACONPHAR	58,489	1.3%	116.2	88.5x	9.2x
Textile	1,432	1,460	-28.36	-1.94%	58	148,284	1.9%	788.5	9.0%	NM	1.0x	ICB	57,326	1.3%	2.3	NM	1.3x
Paper & Printing	9,775	9,943	-167.05	-1.68%	6	37,664	0.5%	72.4	0.8%	55.2x	1.8x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	2,885	2,917	-31.80	-1.09%	6	32,668	0.4%	238.1	2.7%	43.1x	3.0x	DUTCHBANGL	43,156	1.0%	2.6	7.8x	1.0x
Jute	18,256	17,974	+282.29	+1.57%	3	4,251	0.1%	17.8	0.2%	NM	NM	BESTHLDNG	41,416	1.0%	492.6	31.4x	0.7x
Ceramics	645	641	+3.30	+0.52%	5	29,812	0.4%	519.1	5.9%	43.2x	1.8x	UNILEVERCL	40,935	0.9%	3.9	41.4x	19.8x
Miscellaneous	4,635	4,644	-8.47	-0.18%	14	253,201	3.3%	256.6	2.9%	41.1x	2.0x	EBL	36,458	0.8%	10.2	6.5x	0.9x
Corporate Bond**	4,310	4,294	+15.56	+0.36%	13	43,221	0.6%	0.4	0.0%	NM	NM	POWERGRID	35,850	0.8%	48.0	NM	0.3x
Treasury Bond**	86	86	+0.24	+0.27%	240	3,279,995	43.0%	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
CRYSTALINS	117.0	+10.0%	114.3	38.2x	4.6x	SQURPHARMA	121,789	7.1%	9.8x	1.6x	BESTHLDNG	39.1	-4.4%	492.6	31.4x	0.7x
LOVELLO	51.9	+10.0%	257.3	48.1x	4.1x	BATBC	74,086	4.3%	15.7x	5.2x	ROBI	31.2	+4.0%	476.6	51.1x	2.4x
CENTRALINS	55.4	+9.9%	21.3	30.6x	1.1x	BEXIMCO	69,196	4.0%	NM	1.2x	FUWANGCER	27.3	+5.0%	450.0	NM	2.3x
AFCAGRO	21.1	+9.9%	36.4	NM	1.2x	RENATA	68,042	4.0%	53.0x	3.5x	ORIONINFU	709.5	+6.4%	257.5	NM	48.8x
SUNLIFEINS	46.7	+9.9%	18.5	NM	NM	BXPHARMA	45,564	2.7%	12.5x	1.4x	LOVELLO	51.9	+10.0%	257.3	48.1x	4.1x
RDFOOD	41.0	+6.5%	76.0	29.1x	2.4x	GP	38,700	2.3%	11.7x	5.8x	CENTRALPHL	27.6	+2.6%	251.1	NM	5.1x
ORIONINFU	709.5	+6.4%	257.5	NM	49x	BEACONPHAR	34,036	2.0%	88.5x	9.2x	FORTUNE	59.1	-1.8%	220.5	56.6x	3.8x
ANLIMAYARN	42.0	+5.5%	35.7	NM	4.1x	ISLAMIBANK	33,649	2.0%	8.5x	0.7x	MALEKSPIN	38.0	+3.3%	197.7	16.9x	0.7x
SAIFPOWER	27.4	+5.4%	143.1	42.9x	1.7x	BRACBANK	30,964	1.8%	8.9x	1.0x	ITC	53.5	-6.0%	190.8	19.2x	2.8x
RUPALILIFE	123.7	+5.0%	32.9	NM	NM	LHBL	28,853	1.7%	13.4x	4.0x	AFTABAUTO	61.7	-0.3%	184.1	NM	1.2x
						NBL	19,116	1.1%	NM	0.8x						
						PUBALIBANK	18,457	1.1%	4.6x	0.6x						
						CITYBANK	18,190	1.1%	5.1x	0.7x						
						OLYMPIC	16,818	1.0%	18.2x	3.0x						
						ROBI	15,714	0.9%	51.1x	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%	14.8x	3.3x						
						SUMITPOWER	13,369	0.8%	9.9x	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)
GBBPOWER	13.5	-10.0%	13.6	NM	0.7x						LOVELLO	46.0	42.6	15.0	3,302	141.82
KPPL	38.8	-10.0%	6.8	NM	NM						KARNAPHULI	59.0	53.8	10.0	1,122	65.29
STANCERAM	101.6	-9.9%	4.9	NM	NM						MONNOCERA	90.2	90.2	2.0	500	45.10
SAFKOSPINN	17.3	-9.9%	1.8	NM	2.0x						BEACONPHAR	294.2	270.0	2.0	134	39.23
INTECH	32.9	-9.9%	20.0	NM	253.1x						KBPPWBIL	215.0	212.0	9.0	147	31.30
ARAMITCEM	27.5	-9.8%	8.0	NM	NM						DESHBANDHU	43.0	38.0	3.0	347	14.40
YPL	24.1	-9.7%	21.5	NM	4.5x						ABBLPBOND	989.0	989.0	1.0	13	12.85
ALLTEX	16.0	-9.6%	6.0	NM	3.2x						BATBC	481.0	479.8	5.0	26	12.42
UNIONCAP	11.3	-9.6%	2.9	NM	NM						CENTRALINS	51.0	51.0	3.0	196	10.00
PREMIERLEA	5.8	-9.4%	1.7	NM	NM						GP	286.0	261.6	13.0	34	9.14

\* 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
LOVELLO	46.0	42.6	141.8	3,302	15
KARNAPHULI	59.0	53.8	65.3	1,122	10
MONNOCERA	90.2	90.2	45.1	500	2
BEACONPHAR	294.2	270.0	39.2	134	2
KBPPWBIL	215.0	212.0	31.3	147	9
DESHBANDHU	43.0	38.0	14.4	347	3
ABBLPBOND	989.0	989.0	12.9	13	1
BATBC	481.0	479.8	12.4	26	5
CENTRALINS	51.0	51.0	10.0	196	3
GP	286.0	261.6	9.1	34	13
UTTARABANK	27.3	26.2	9.1	340	2
RELIANCE1	16.0	16.0	6.4	402	3
CRYSTALINS	102.0	102.0	5.1	50	1
BESTHLDNG	42.9	40.0	4.9	122	2
EASTERNINS	67.0	67.0	4.8	71	1
EIL	49.9	41.0	3.8	85	5
BEXIMCO	104.4	104.1	3.6	34	4
AFTABAUTO	63.0	62.5	3.2	50	2
SAIFPOWER	26.1	26.0	2.6	100	2
BPPL	20.1	20.1	2.0	100	1
SHYAMPSUG	239.6	239.6	2.0	8	1
AGNISYSL	31.0	31.0	1.6	50	1
<b>Total</b>			<b>443.2</b>		<b>107</b>

**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**
**SAFKOSPINN**

The company has informed that the Board of Directors has decided to temporarily suspend the production from 12th February 2024 for a period of two months. However, the other activities of the mills like maintenance works etc. will be kept running as usual.

**ROBI**

The Board of Directors has recommended 10% Cash dividend for the year ended December 31, 2023. Date of AGM: 24.04.2024, Time: 11:00 AM, Venue: Hybrid (address and link will be shared in due course). Record date: 18.03.2024. The Company has also reported EPS of Tk. 0.61, NAV per share of Tk. 12.76 and NOCFPS of Tk. 7.79 for the year ended on December 31, 2023 as against Tk. 0.35, Tk. 12.82 and Tk. 7.12 respectively for the year ended December 31, 2022.

**LRBDL**

**(Half-Yearly Un-audited):** EPS was Tk. 0.25 for July-December 2023 as against Tk. 1.05 for July-December 2022. NOCFPS was Tk. 1.40 for July-December 2023 as against Tk. 1.80 for July-December 2022. NAV per share (with revaluation) was Tk. 38.41 as on December 31, 2023 and Tk. 38.36 as on June 30, 2023. NAV per share (without revaluation) was Tk. 34.41 as on December 31, 2023 and Tk. 34.35 as on June 30, 2023.

**SSSTEEL**

Mr. Mohammad Shirajul Islam, a Sponsor of the Company, has expressed his intention to sell 30,00,000 shares out of his total holding of 67,13,506 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

**SSSTEEL**

NJ Holdings Ltd., a Corporate Director of the Company, has expressed its intention to buy 30,00,000 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

**DOREENPWR**

The Company has informed that the Power Purchase Agreement (PPA) of Doreen (DPGSL) 22 MW Power Plant at Feni, one of the three power plants of the Company is going to expire on February 15, 2024. The Company had applied for extension of the Contract for supplying Electricity to Power Division of the Ministry of Power, Energy and Mineral Resources (MPEMR) on February 27, 2023 which is under active consideration. As the PA's term is over, the plant will be in shut-down condition from mid-night of February 15, 2024 until further instruction from Bangladesh Power Development Board (BPDB) or Ministry of Power, Energy and Mineral Resources for operation of the Power Plant.

**ALLTEX**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**ARAMITCEM**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

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**AZIZPIPES**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**DELTASPINN**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(b) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**FASFIN**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**GBBPOWER**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(c) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**INTECH**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**ILFSL**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**KEYACOSMET**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(b) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**KPPL**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(c) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**NTC**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**PREMIERLEA**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**REGENTEX**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(c) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**RENWICKJA**

The Company has been placed in 'Z' category from existing 'A' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**RINGSHINE**

The Company has been placed in 'Z' category from existing 'A' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**SAFKOSPINN**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**STANCERAM**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**DACCADYE**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**UNIONCAP**

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., February 18, 2024 as per provision 1(d) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

**UTTARAFIN**

The Company has been placed in 'Z' category from existing 'A' category with effect from today i.e., February 18, 2024 as per provision 1(b) of BSEC Order No. SEC/CMRRCD/2009-193/74(R) dated February 15, 2024.

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