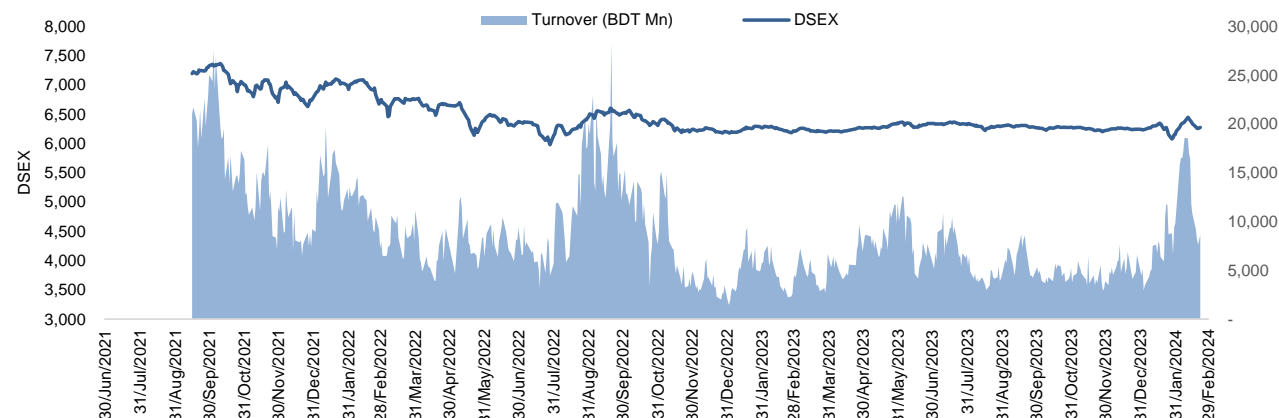


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.28%) gained 17.83 points and closed at 6,273.96. The blue-chip index DS30 (+0.35%), the Shariah-based index DSES (+0.06%), and the large-cap index CDSET (-0.02%) closed at 2,139.58, 1,360.52, and 1,185.75 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.75%, followed by Engineering (+0.37%), Food & Allied (+0.03%), Pharmaceutical (-0.08%), Telecommunication (-0.10%), Fuel & Power (-0.47%), and NBFI (-0.80%), respectively. Block trades contributed 3.9% of the overall market turnover. Uttara Bank Limited (+8.4%) was the most traded share with a turnover of BDT 349 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,273.96	6,256.13	+17.83	+0.28%	+0.4%
DS30	2,139.58	2,132.12	+7.45	+0.35%	+2.2%
DSES	1,360.52	1,359.77	+0.75	+0.06%	-0.3%
CDSET	1,185.75	1,185.94	-0.19	-0.02%	-1.4%

	Advanced	Declined	Unchanged	Total
All Category	197	141	61	399
A Category (Equity)	104	97	38	239
B Category (Equity)	71	26	13	110
N Category (Equity)	0	2	2	4
Z Category (Equity)	22	16	8	46
Mutual Funds	14	10	13	37
Corporate Bonds	2	2	2	6
Treasury Bonds	0	4	0	4

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,620,147	7,626,799	-0.1%
	Mn USD	69,274	69,335	
Turnover	Mn BDT	8,622	7,646	+12.8%
	Mn USD	78	70	
Volume	Mn Shares	275	232	+18.5%
No. of Trade		216,954	198,149	+9.5%

* Average Interbank Exchange Rate is BDT 110.00 as of Feb 22, 2024

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Figure: Sectorial Turnover (BDT Mn)

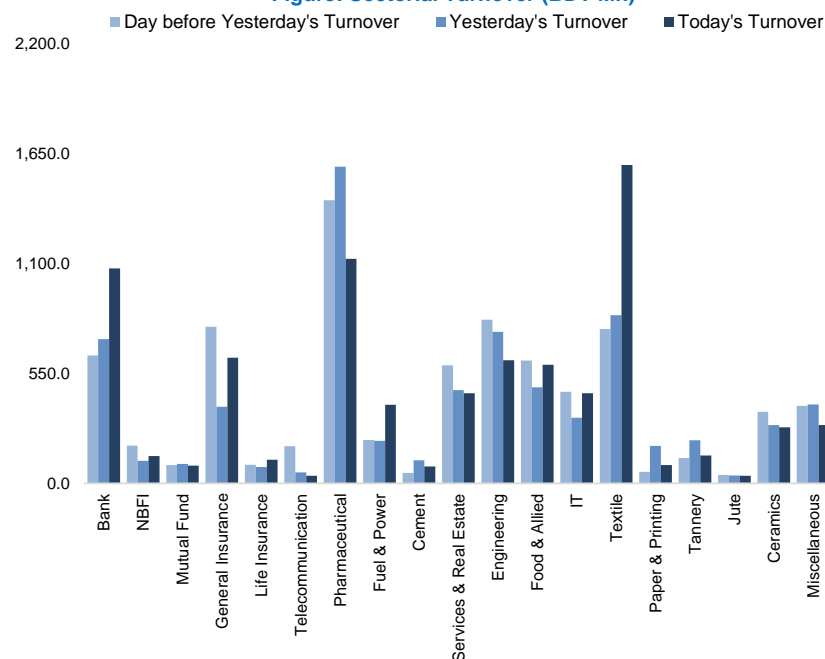
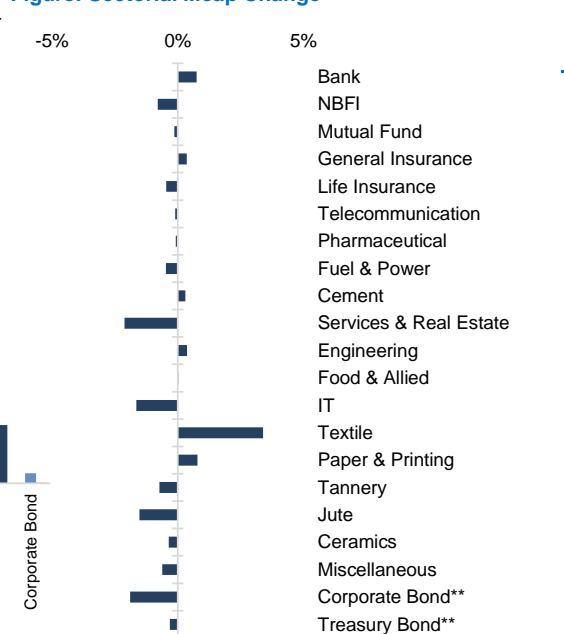


Figure: Sectorial Mcap Change



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	1,492	1,481	+11.15	+0.75%	35	703,726	9.3%	1,075.5	13.0%	12.8x	0.7x	GP	386,996	9.0%	0.8	11.7x	5.8x
NBFI	1,480	1,492	-11.94	-0.80%	23	145,404	1.9%	137.2	1.7%	NM	NM	BATBC	280,098	6.5%	0.0	15.7x	5.2x
Mutual Fund	776	777	-1.06	-0.14%	37	36,682	0.5%	88.7	1.1%	NM	0.7x	WALTONHIL	230,468	5.3%	3.9	20.8x	2.2x
General Insurance	3,694	3,681	+13.26	+0.36%	43	109,917	1.4%	628.6	7.6%	20.0x	1.7x	SQURPHARMA	195,374	4.5%	112.2	10.0x	1.7x
Life Insurance	2,342	2,352	-10.89	-0.46%	15	63,992	0.8%	118.0	1.4%	NM	NM	ROBI	157,138	3.6%	3.0	49.2x	2.4x
Telecommunication	4,848	4,853	-4.78	-0.10%	3	568,837	7.5%	37.8	0.5%	14.8x	3.8x	RENATA	110,957	2.6%	28.2	52.4x	3.5x
Pharmaceutical	3,580	3,583	-2.95	-0.08%	33	691,964	9.1%	1,123.6	13.6%	19.0x	2.1x	BEXIMCO	103,842	2.4%	0.0	NM	1.2x
Fuel & Power	1,429	1,436	-6.79	-0.47%	23	373,191	4.9%	392.6	4.7%	27.2x	0.9x	UPGDCL	99,128	2.3%	3.4	14.5x	3.2x
Cement	2,633	2,625	+7.92	+0.30%	7	127,034	1.7%	84.5	1.0%	16.7x	2.7x	BERGERPBL	87,997	2.0%	2.1	27.1x	6.5x
Services & Real Estate	1,770	1,808	-38.17	-2.11%	9	99,127	1.3%	451.1	5.4%	25.1x	0.7x	LHBL	85,129	2.0%	62.5	13.4x	4.0x
Engineering	3,596	3,582	+13.41	+0.37%	42	423,170	5.6%	615.9	7.4%	19.2x	1.4x	BRACBANK	69,180	1.6%	186.7	9.2x	1.1x
Food & Allied	21,292	21,286	+5.92	+0.03%	21	396,625	5.2%	593.9	7.2%	20.5x	6.6x	BXPHARMA	59,556	1.4%	54.5	12.1x	1.3x
IT	3,136	3,188	-52.42	-1.64%	11	40,885	0.5%	451.2	5.4%	34.0x	2.7x	ICB	57,239	1.3%	1.3	NM	1.3x
Textile	1,500	1,451	+49.25	+3.39%	58	155,345	2.0%	1,592.9	19.2%	NM	1.0x	BEACONPHAR	54,516	1.3%	115.4	82.5x	8.6x
Paper & Printing	9,785	9,709	+76.20	+0.78%	6	37,702	0.5%	91.0	1.1%	55.3x	1.8x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	2,814	2,834	-20.61	-0.73%	6	31,856	0.4%	139.1	1.7%	42.0x	2.9x	DUTCHBANGL	43,156	1.0%	3.1	7.8x	1.0x
Jute	18,657	18,945	-287.63	-1.52%	3	4,344	0.1%	38.1	0.5%	NM	NM	UNILEVERCL	40,914	0.9%	0.8	41.4x	19.8x
Ceramics	638	640	-2.31	-0.36%	5	29,503	0.4%	280.1	3.4%	42.7x	1.7x	BESTHLDNG	39,615	0.9%	272.5	30.1x	0.7x
Miscellaneous	4,593	4,622	-28.69	-0.62%	14	250,906	3.3%	291.9	3.5%	40.7x	2.0x	POWERGRID	37,133	0.9%	89.9	NM	0.3x
Corporate Bond**	4,232	4,314	-81.77	-1.90%	13	42,441	0.6%	3.1	0.0%	NM	NM	EBL	36,941	0.9%	7.4	6.5x	1.0x
Treasury Bond**	86	86	-0.27	-0.32%	240	3,268,392	43.0%	46.4	0.6%	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
VFSTDL	18.7	+10.0%	80.0	37.3x	0.9x	SQURPHARMA	121,789	7.1%	10.0x	1.7x	UTTARABANK	27.2	+8.4%	349.5	21.5x	0.9x
MONOSPOOL	183.3	+10.0%	0.6	20.8x	3.2x	BATBC	74,086	4.3%	15.7x	5.2x	BESTHLDNG	37.4	-4.1%	272.5	30.1x	0.7x
PAPERPROC	160.3	+9.9%	0.1	31.8x	4.2x	BEXIMCO	69,196	4.0%	NM	1.2x	MONNOFABR	28.6	-1.4%	225.7	NM	1.1x
QUEENSOUTH	19.9	+9.9%	52.0	52.0x	1.3x	RENATA	68,042	4.0%	52.4x	3.5x	AIL	90.2	+6.2%	201.9	43.0x	3.7x
ESQUIRENIT	31.1	+9.9%	43.0	NM	0.5x	BXPHARMA	45,564	2.7%	12.1x	1.3x	GEMINISEA	428.3	+5.6%	191.7	49.1x	21.8x
MEGHNA PET	38.9	+9.9%	4.5	NM	NM	GP	38,700	2.3%	11.7x	5.8x	ITC	51.5	-4.6%	191.2	18.5x	2.7x
KTL	17.8	+9.9%	52.5	36.3x	1x	BEACONPHAR	34,036	2.0%	82.5x	8.6x	BRACBANK	43.0	+0.7%	186.7	9.2x	1.1x
PRIMETEX	24.6	+9.8%	16.2	NM	0.4x	ISLAMIBANK	33,649	2.0%	8.5x	0.7x	CENTRALINS	59.7	+7.4%	184.1	33.0x	1.2x
HFL	17.9	+9.8%	18.7	NM	0.5x	BRACBANK	30,964	1.8%	9.2x	1.1x	FUWANGCER	25.5	+2.4%	178.7	94.4x	2.1x
REGENTTEX	6.9	+9.5%	2.5	NM	0.3x	LHBL	28,853	1.7%	13.4x	4.0x	INTRACO	45.0	+4.2%	162.8	48.4x	3.8x
						NBL	19,116	1.1%	NM	0.8x						
						PUBALIBANK	18,457	1.1%	4.7x	0.7x						
						CITYBANK	18,190	1.1%	5.1x	0.7x						
						OLYMPIC	16,818	1.0%	18.0x	3.0x						
						ROBI	15,714	0.9%	49.2x	2.4x						
						BSRMLTD	14,210	0.8%	4.5x	0.6x						
						PRIMEBANK	13,962	0.8%	5.5x	0.8x						
						UPGDCL	13,547	0.8%	14.5x	3.2x						
						SUMITPOWER	13,369	0.8%	12.4x	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)
RSRMSTEEL	19.1	-6.8%	4.1	NM	0.4x						AIL	87.7	83.7	18.0	1,059	90.21
SUMITPOWER	25.7	-6.5%	40.5	12.4x	1x						CENTRALINS	57.1	55.0	10.0	685	38.05
KBPPWBIL	211.7	-6.0%	49.9	NM	17.8x						KARNAPHULI	59.2	53.1	10.0	392	22.98
ITC	51.5	-4.6%	191.2	18.5x	2.7x						BERGERPBL	1,900.0	1,900.0	2.0	10	19.00
GSPFINANCE	17.1	-4.5%	30.9	NM	0.7x						IFIC	14.2	13.0	2.0	1,048	14.82
AAMRANET	46.7	-4.3%	43.5	12.6x	1.2x						ADNTEL	144.0	128.8	2.0	88	11.45
BESTHLDNG	37.4	-4.1%	272.5	30.1x	0.7x						RUPALILIFE	122.0	107.0	2.0	96	11.04
ILFSL	5.7	-3.4%	2.4	NM	NM						AAMRANET	49.9	49.9	2.0	213	10.63
AGNISYSL	29.4	-3.3%	83.1	28.8x	1.8x						GP	283.0	261.6	12.0	38	10.08
BEACONPHAR	236.0	-3.2%	115.4	82.5x	8.6x						LOVELLO	47.5	47.5	1.0	204	9.70

* 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
AIL	87.7	83.7	90.2	1,059	18
CENTRALINS	57.1	55.0	38.0	685	10
KARNAPHULI	59.2	53.1	23.0	392	10
BERGERPBL	1,900.0	1,900.0	19.0	10	2
IFIC	14.2	13.0	14.8	1,048	2
ADNTEL	144.0	128.8	11.5	88	2
RUPALILIFE	122.0	107.0	11.0	96	2
AAMRANET	49.9	49.9	10.6	213	2
GP	283.0	261.6	10.1	38	12
LOVELLO	47.5	47.5	9.7	204	1
SONALIPAPR	547.0	547.0	9.2	17	1
SPCL	59.0	59.0	7.1	120	8
BEACONPHAR	249.0	249.0	6.9	28	1
SBACBANK	12.1	12.0	6.6	550	2
FINEFOODS	128.0	128.0	6.4	50	1
CRYSTALINS	124.9	124.9	6.1	49	2
INTRACO	43.6	43.6	5.5	125	3
EHL	91.0	88.0	5.4	60	2
ADVENT	33.1	32.1	4.9	150	2
RDFOOD	42.7	42.5	4.3	101	2
ORIONINFU	700.0	700.0	3.8	5	1
ROBI	29.0	27.8	3.7	130	6
Total			340.6		119

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
CRYSTALINS		7.0%	10%	Record Date	12-Mar-24
CITYGENINS		0.0%	12%	Record Date	12-Mar-24
SUMITPOWER		0.0%	10%	Record Date	14-Mar-24

Important DSE News
GQBALLPEN

Mrs. Salma Huq, a Director of the company, has expressed her intention to transfer 34,500 shares of the company to her daughter Ms. Sana Huq (General Shareholder of the company), by way of gift outside the trading system of the Exchange within 30 working days with effect from January 21, 2024.

SUMITPOWER

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2023. The Company has also reported Consolidated EPS of Tk. 2.07, Consolidated NAV per share of Tk. 38.02 and Consolidated NOCFPS of Tk. 7.04 for the year ended June 30, 2023 as against Tk. 3.87, Tk. 35.72 and Tk. 5.91 respectively for the year ended June 30, 2022. Record Date: 14.03.2024. Date of AGM: 18.04.2024, Time: 11:30 AM, Venue: Hybrid System, Location of physical meeting: Krishibid Institution Bangladesh (KIB), Krishi Khamar Sarak, Khamarbari, Farmgate, Dhaka-1215.

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