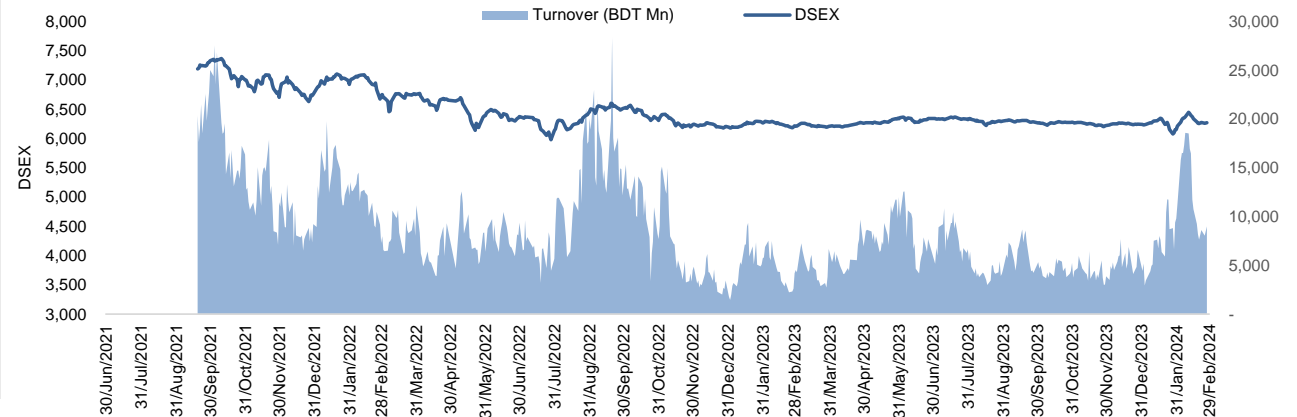


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.21%) gained 13.09 points and closed at 6,272.73. The blue-chip index DS30 (+0.03%), the Shariah-based index DSES (+0.23%), and the large-cap index CDSET (-0.25%) closed at 2,138.00, 1,365.65, and 1,180.03 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.66% followed by Fuel & Power (+0.45%), Food & Allied (+0.23%), Telecommunication (+0.06%). NBFI experienced the highest loss of 0.63% followed by Pharmaceutical (-0.30%), Bank (-0.27%). Block trades contributed 4.0% of the overall market turnover. Best Holdings Limited (+1.2%) was the most traded share with a turnover of BDT 502 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,272.73	6,259.63	+13.09	+0.21%	+0.4%
DS30	2,138.00	2,137.27	+0.72	+0.03%	+2.1%
DSES	1,365.65	1,362.55	+3.10	+0.23%	+0.1%
CDSET	1,180.03	1,183.04	-3.01	-0.25%	-1.9%

	Advanced	Declined	Unchanged	Total
All Category	183	153	59	395
A Category (Equity)	116	81	38	235
B Category (Equity)	54	47	9	110
N Category (Equity)	2	2	0	4
Z Category (Equity)	11	23	12	46
Mutual Funds	21	2	14	37
Corporate Bonds	2	1	0	3
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,622,166	7,615,659	+0.1%
	Mn USD	69,292	69,233	
Turnover	Mn BDT	8,982	8,050	+11.6%
	Mn USD	82	73	
Volume	Mn Shares	259	245	+5.5%
No. of Trade		233,530	210,841	+10.8%

* Average Interbank Exchange Rate is BDT 110.00 as of Feb 27, 2024

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Figure: Sectorial Turnover (BDT Mn)

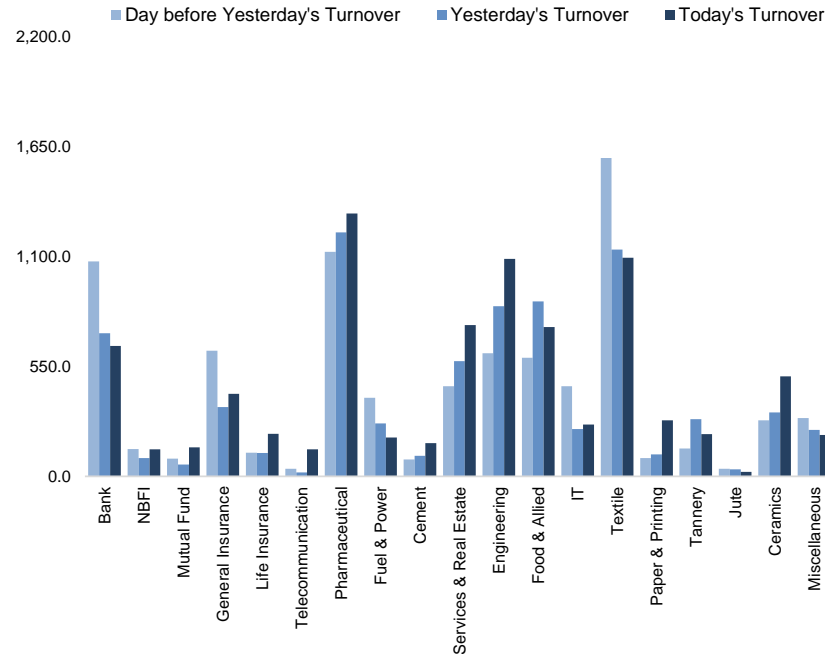
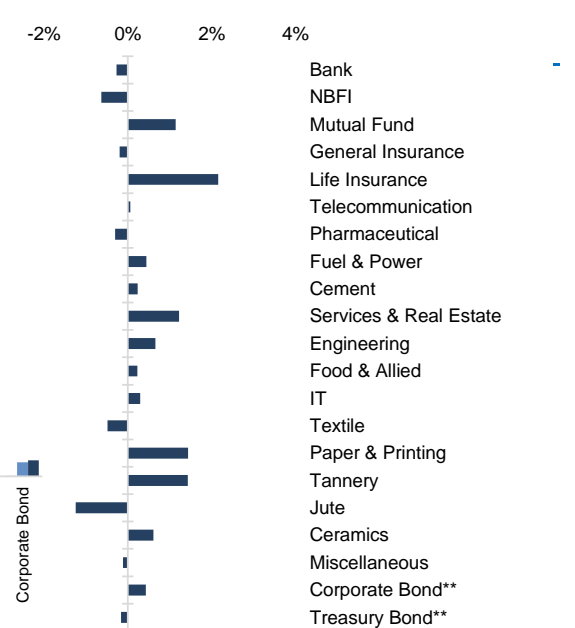


Figure: Sectorial Mcap Change



Market PE 18.0x

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	1,483	-3.97	-0.27%	36	704,407	9.3%	653.2	7.6%	12.7x	0.7x	GP	386,996	9.0%	0.8	11.7x	5.8x
NBFI	1,468	1,478	-9.30	-0.63%	23	144,284	1.9%	134.6	1.6%	NM	NM	BATBC	280,098	6.5%	0.6	15.7x	5.2x
Mutual Fund	779	770	+8.78	+1.14%	37	36,828	0.5%	144.9	1.7%	NM	0.7x	WALTONHIL	227,287	5.3%	5.5	20.5x	2.2x
General Insurance	3,649	3,656	-7.20	-0.20%	43	108,584	1.4%	412.6	4.8%	19.8x	1.7x	SQRPHARMA	192,626	4.5%	51.0	9.8x	1.6x
Life Insurance	2,382	2,332	+50.31	+2.16%	15	65,106	0.9%	212.2	2.5%	NM	NM	ROBI	157,138	3.6%	117.8	49.2x	2.4x
Telecommunication	4,849	4,846	+2.81	+0.06%	3	568,919	7.5%	135.3	1.6%	14.8x	3.8x	RENATA	108,457	2.5%	40.5	51.3x	3.4x
Pharmaceutical	3,562	3,573	-10.70	-0.30%	33	688,535	9.1%	1,315.6	15.3%	18.9x	2.1x	BEXIMCO	103,842	2.4%	0.0	NM	1.2x
Fuel & Power	1,411	1,405	+6.25	+0.45%	23	368,314	4.8%	194.6	2.3%	26.8x	0.9x	UPGDCL	97,911	2.3%	6.7	14.3x	3.2x
Cement	2,648	2,642	+6.22	+0.24%	7	127,774	1.7%	166.7	1.9%	16.8x	2.7x	BERGERPBL	87,497	2.0%	5.4	26.9x	6.5x
Services & Real Estate	1,851	1,828	+22.35	+1.22%	9	103,670	1.4%	756.2	8.8%	26.2x	0.8x	LHBL	85,942	2.0%	138.1	13.5x	4.0x
Engineering	3,599	3,576	+23.57	+0.66%	42	423,602	5.6%	1,087.8	12.6%	19.2x	1.4x	BRACBANK	69,180	1.6%	118.8	9.2x	1.1x
Food & Allied	21,380	21,332	+48.73	+0.23%	21	398,277	5.2%	746.8	8.7%	20.6x	6.6x	BXPHARMA	59,734	1.4%	25.2	12.2x	1.3x
IT	3,106	3,096	+9.23	+0.30%	11	40,489	0.5%	259.4	3.0%	33.6x	2.7x	ICB	57,499	1.3%	1.5	NM	1.3x
Textile	1,474	1,482	-7.19	-0.49%	58	152,681	2.0%	1,093.6	12.7%	NM	1.0x	BEACONPHAR	55,717	1.3%	41.6	84.3x	8.8x
Paper & Printing	10,037	9,895	+142.09	+1.44%	6	38,673	0.5%	281.0	3.3%	56.7x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	2,867	2,826	+40.47	+1.43%	6	32,457	0.4%	211.9	2.5%	42.8x	3.0x	BESTHLDNG	43,958	1.0%	502.0	33.4x	0.8x
Jute	18,752	18,988	-236.35	-1.24%	3	4,367	0.1%	22.6	0.3%	NM	NM	DUTCHBANGL	42,632	1.0%	1.1	7.7x	1.0x
Ceramics	636	633	+3.85	+0.61%	5	29,436	0.4%	500.8	5.8%	42.6x	1.7x	UNILEVERCL	41,737	1.0%	9.1	42.2x	20.2x
Miscellaneous	4,586	4,591	-5.16	-0.11%	14	250,525	3.3%	206.8	2.4%	40.6x	2.0x	EBL	36,458	0.8%	5.9	6.5x	0.9x
Corporate Bond**	4,265	4,247	+18.25	+0.43%	13	42,774	0.6%	80.1	0.9%	NM	NM	POWERGRID	34,140	0.8%	5.4	NM	0.3x
Treasury Bond**	86	86	-0.14	-0.16%	240	3,272,206	43.0%	3.2	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
1STPRIMFMF	35.2	+10.0%	56.8	NM	3.3x	SQRPHARMA	121,789	7.1%	9.8x	1.6x	BESTHLDNG	41.5	+1.2%	502.0	33.4x	0.8x
NRBBANK	11.0	+10.0%	2.6	17.8x	0.9x	BATBC	74,086	4.3%	15.7x	5.2x	FUWANGCER	27.9	+7.7%	429.7	NM	2.3x
RUPALILIFE	126.3	+9.9%	75.3	NM	NM	BEXIMCO	69,196	4.0%	NM	1.2x	CENTRALPHL	30.1	+2.7%	326.0	NM	5.5x
AFTABAUTO	55.9	+9.8%	190.4	NM	1.1x	RENATA	68,042	4.0%	51.3x	3.4x	ORIONINFU	682.4	+1.6%	301.1	NM	47.0x
BBSABLES	40.5	+9.8%	92.0	NM	1.2x	BXPHARMA	45,564	2.7%	12.2x	1.3x	AFTABAUTO	55.9	+9.8%	190.4	NM	1.1x
MONNOFABR	29.5	+9.7%	157.6	NM	1.2x	GP	38,700	2.3%	11.7x	5.8x	FORTUNE	57.0	+0.7%	183.8	54.6x	3.7x
MITHUNKNIT	22.7	+9.7%	12.3	NM	7x	BEACONPHAR	34,036	2.0%	84.3x	8.8x	AIL	93.1	+2.1%	181.1	44.3x	3.8x
MONOSPOOL	219.2	+8.7%	51.9	24.8x	3.9x	ISLAMIBANK	33,649	2.0%	8.5x	0.7x	BDTHAI	31.7	+0.6%	164.6	NM	1.2x
NAVANACNG	32.2	+8.4%	27.4	NM	1.0x	BRACBANK	30,964	1.8%	9.2x	1.1x	GEMINISEA	414.0	+2.6%	164.1	47.5x	21.1x
FINEFOODS	149.4	+8.1%	83.6	NM	13.8x	LHBL	28,853	1.7%	13.5x	4.0x	MONNOFABR	29.5	+9.7%	157.6	NM	1.2x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	PUBALIBANK	18,457	1.1%	4.7x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
KPPL	30.0	-9.6%	77.9	NM	NM	CITYBANK	18,190	1.1%	5.1x	0.7x	FINEFOODS	139.0	128.3	16.0	283	38.18
INTECH	32.1	-4.5%	7.7	NM	247x	OLYMPIC	16,818	1.0%	17.6x	2.9x	GP	268.0	261.6	39.0	136	36.01
PEOPLESINS	43.4	-4.0%	20.0	16.7x	1.3x	ROBI	15,714	0.9%	49.2x	2.4x	BEACHHATCH	60.6	60.2	11.0	590	35.58
SBACBANK	12.1	-4.0%	55.3	8.8x	0.9x	BSRMLTD	14,210	0.8%	4.5x	0.6x	BATBC	515.0	479.8	18.0	69	33.31
MEGHNA PET	36.7	-3.9%	3.5	NM	NM	PRIMEBANK	13,962	0.8%	5.5x	0.8x	ANLIMAYARN	45.1	41.0	7.0	700	30.30
PRIMEINSUR	49.9	-3.9%	37.5	24.3x	2.3x	UPGDCL	13,547	0.8%	14.3x	3.2x	RENATA	950.0	950.0	1.0	20	19.00
VFSTDL	18.0	-3.7%	53.6	35.9x	0.9x	SUMITPOWER	13,369	0.8%	12.3x	0.7x	CENTRALINS	62.0	55.2	2.0	249	14.43
MLDYING	16.5	-3.5%	16.0	NM	1.3x	ALARABANK	13,112	0.8%	12.6x	1.1x	BESTHLDNG	41.4	41.0	4.0	342	14.03
HFL	17.0	-3.4%	6.1	NM	0.5x						DBH	44.5	44.5	2.0	300	13.35
ACFL	22.8	-3.4%	3.5	NM	0.7x						BEXIMCO	108.0	104.1	11.0	122	12.99

* 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

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** 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
FINEFOODS	139.0	128.3	38.2	283	16
GP	268.0	261.6	36.0	136	39
BEACHHATCH	60.6	60.2	35.6	590	11
BATBC	515.0	479.8	33.3	69	18
ANLIMAYARN	45.1	41.0	30.3	700	7
RENATA	950.0	950.0	19.0	20	1
CENTRALINS	62.0	55.2	14.4	249	2
BESTHLDNG	41.4	41.0	14.0	342	4
DBH	44.5	44.5	13.4	300	2
BEXIMCO	108.0	104.1	13.0	122	11
BSRMLTD	90.0	88.9	12.5	140	2
LHBL	73.6	73.6	11.0	150	2
LOVELLO	46.0	46.0	9.4	204	1
ROBI	30.8	28.1	8.8	300	13
SAMORITA	83.0	83.0	8.3	100	1
AFTABAUTO	54.0	53.5	7.7	143	4
ADVENT	32.9	27.0	6.8	219	4
AIL	91.0	88.0	5.9	66	5
ORIONINFU	690.0	690.0	4.5	7	1
SQURPHARMA	218.8	218.8	3.7	17	1
BPML	73.0	73.0	3.7	50	1
FORTUNE	51.3	51.3	2.7	53	1
Total			362.2		178

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
NRBBANK

Trading of shares of NRB Bank Limited will start at DSE from today i.e. February 27, 2024 under 'N' category. DSE Trading Code for NRB Bank Limited is "NRBBANK" and DSE Company Code is 11155 under 'Bank' sector. The Stock Brokers, Merchant Bankers and Portfolio Managers are requested to abstain from providing loan facilities to purchase securities of NRB Bank Limited in between 1st to 30th trading day starting from today i.e., February 27, 2024 as per BSEC Directive No. BSEC/CMRRCD/2009-193/32 dated December 26, 2021. NRB Bank Limited: (09 months): As per audited consolidated financial statements, profit after tax was BDT 160.72 million and basic EPS of BDT 0.27 for the 09 (nine) months (January-September 2023) period ended on 30 September 2023 as against profit after tax of BDT 284.76 million and basic EPS of BDT 0.48 for the same period of the previous year. However, Post-IPO EPS would be BDT 0.23 for 09 (nine) months (January-September 2023) period ended on 30 September 2023. Pre-IPO Net Asset Value (NAV) per share (considering Pre-IPO paid up shares) would be BDT 12.72 as on 30 September 2023 and the same would be BDT 12.33 (considering Post-IPO paid up shares). Pre-IPO weighted average paid up number of shares for 09 (nine) months (January-September 2023) period ended on 30 September 2023 was 590,587,200 which was same for the same period of the previous year and Post-IPO paid-up number of shares would be 690,587,200.

RINGSHINE

The company has informed that Mr. A.K.M. Shahidul Islam, retired District Judge, has been appointed as the Chairman of the Board of Directors of the company with effect from February 18, 2024.

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