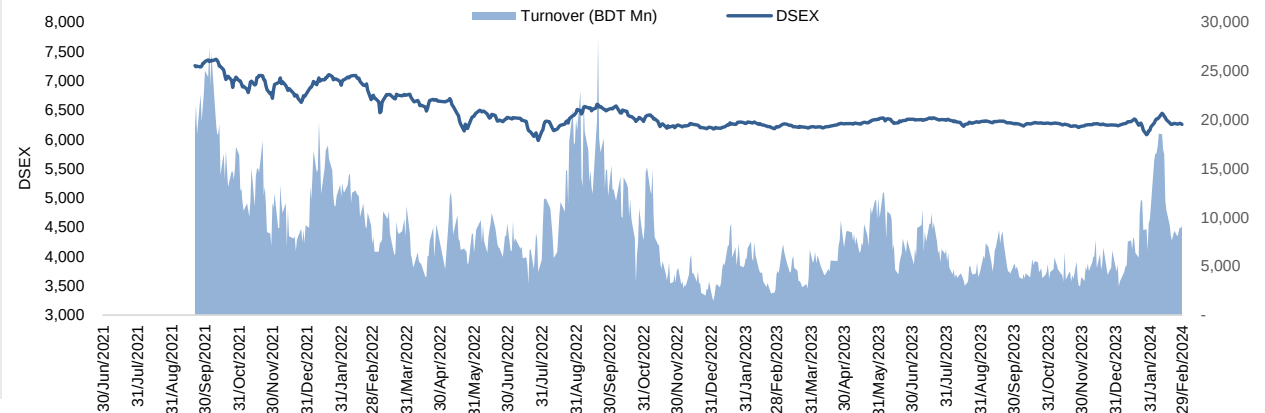


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.22%) lost 14.09 points and closed at 6,254.54. The blue-chip index DS30 (-0.27%), the Shariah-based index DSES (-0.28%), and the large-cap index CDSET (-0.14%) closed at 2,126.80, 1,359.82, and 1,178.28 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.54% followed by Telecommunication (-0.47%), Engineering (-0.37%), Fuel & Power (-0.34%), Bank (-0.33%), Pharmaceutical (-0.26%), and Food & Allied (+0.07%), respectively. Block trades contributed 6.7% of the overall market turnover. Orion Infusion Ltd. (+0.4%) was the most traded share with a turnover of BDT 478 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,254.54	6,268.63	-14.09	-0.22%	+0.1%
DS30	2,126.80	2,132.62	-5.82	-0.27%	+1.6%
DSES	1,359.82	1,363.67	-3.85	-0.28%	-0.3%
CDSET	1,178.28	1,179.98	-1.70	-0.14%	-2.0%

	Advanced	Declined	Unchanged	Total
All Category	128	205	63	396
A Category (Equity)	85	115	37	237
B Category (Equity)	29	65	15	109
N Category (Equity)	2	2	0	4
Z Category (Equity)	12	23	11	46
Mutual Funds	7	16	14	37
Corporate Bonds	3	3	0	6
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,607,235	7,628,169	-0.3%
	Mn USD	69,157	69,347	
Turnover	Mn BDT	9,164	8,888	+3.1%
	Mn USD	83	81	
Volume	Mn Shares	272	261	+4.4%
No. of Trade		218,670	225,914	-3.2%

* Average Interbank Exchange Rate is BDT 110.00 as of Feb 29, 2024

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Figure: Sectorial Turnover (BDT Mn)

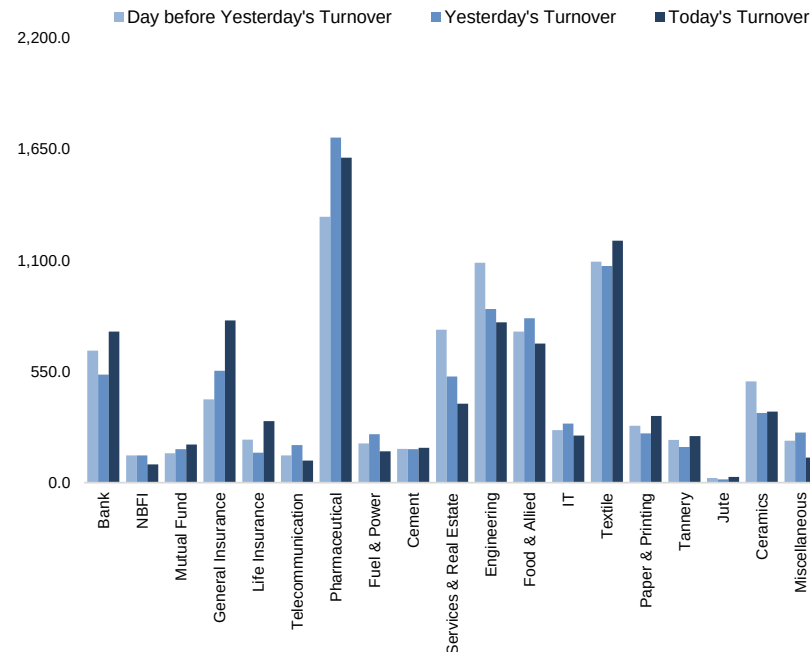
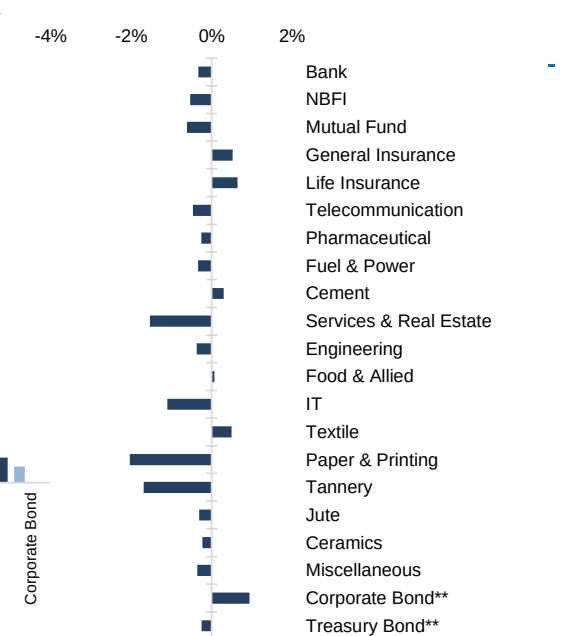


Figure: Sectorial Mcap Change



Market PE 17.9x

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	1,472	1,477	-4.92	-0.33%	36	701,361	9.2%	746.6	8.7%	12.7x	0.7x	GP	386,996	9.0%	0.0	11.7x	5.8x
NBFI	1,454	1,461	-7.82	-0.54%	23	142,818	1.9%	89.9	1.1%	NM	NM	BATBC	280,098	6.5%	0.8	15.7x	5.2x
Mutual Fund	778	783	-4.81	-0.61%	37	36,794	0.5%	188.8	2.2%	NM	0.7x	WALTONHIL	225,833	5.3%	2.4	20.4x	2.2x
General Insurance	3,697	3,678	+19.11	+0.52%	43	110,024	1.5%	802.8	9.4%	20.1x	1.7x	SQURPHARMA	192,183	4.5%	26.1	9.8x	1.6x
Life Insurance	2,385	2,369	+15.28	+0.65%	15	65,169	0.9%	304.5	3.6%	NM	NM	ROBI	157,138	3.7%	94.0	49.2x	2.4x
Telecommunication	4,850	4,872	-22.78	-0.47%	3	568,969	7.5%	109.3	1.3%	14.8x	3.8x	RENATA	108,228	2.5%	24.2	51.1x	3.4x
Pharmaceutical	3,549	3,558	-9.09	-0.26%	33	686,057	9.0%	1,607.0	18.8%	18.8x	2.1x	BEXIMCO	103,842	2.4%	0.1	NM	1.2x
Fuel & Power	1,400	1,405	-4.76	-0.34%	23	365,563	4.8%	155.5	1.8%	26.6x	0.9x	UPGDCL	97,447	2.3%	5.7	14.2x	3.2x
Cement	2,681	2,673	+7.96	+0.30%	7	129,379	1.7%	172.6	2.0%	17.0x	2.7x	LHBL	86,522	2.0%	104.4	13.6x	4.1x
Services & Real Estate	1,795	1,823	-27.97	-1.53%	9	100,562	1.3%	390.1	4.6%	25.4x	0.8x	BERGERPBL	86,277	2.0%	6.1	26.5x	6.4x
Engineering	3,570	3,583	-13.23	-0.37%	42	420,122	5.5%	792.9	9.3%	19.1x	1.4x	BRACBANK	68,697	1.6%	22.7	9.2x	1.1x
Food & Allied	21,404	21,389	+15.42	+0.07%	21	398,718	5.3%	687.9	8.0%	20.6x	6.6x	BXPHARMA	59,333	1.4%	10.8	12.1x	1.3x
IT	3,061	3,096	-34.02	-1.10%	11	39,913	0.5%	233.3	2.7%	33.2x	2.6x	ICB	57,066	1.3%	1.8	NM	1.3x
Textile	1,480	1,473	+7.25	+0.49%	58	153,260	2.0%	1,196.3	14.0%	NM	1.0x	BEACONPHAR	54,608	1.3%	29.9	82.7x	8.6x
Paper & Printing	10,034	10,242	-208.36	-2.03%	6	38,660	0.5%	330.4	3.9%	56.7x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	2,786	2,834	-47.95	-1.69%	6	31,541	0.4%	230.2	2.7%	41.6x	2.9x	UNILEVERCL	43,084	1.0%	8.0	43.6x	20.8x
Jute	18,555	18,612	-57.13	-0.31%	3	4,321	0.1%	27.8	0.3%	NM	NM	DUTCHBANGL	42,632	1.0%	2.9	7.7x	1.0x
Ceramics	636	638	-1.47	-0.23%	5	29,436	0.4%	351.3	4.1%	44.4x	1.7x	BESTHLDNG	41,098	1.0%	222.0	31.2x	0.7x
Miscellaneous	4,560	4,576	-16.18	-0.35%	14	249,112	3.3%	124.2	1.5%	40.4x	2.0x	EBL	36,458	0.8%	2.7	6.5x	0.9x
Corporate Bond**	4,285	4,245	+39.88	+0.94%	13	42,970	0.6%	0.5	0.0%	NM	NM	POWERGRID	33,783	0.8%	4.2	NM	0.3x
Treasury Bond**	86	86	-0.22	-0.25%	240	3,272,390	43.1%	4.0	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
FINEFOODS	159.1	+10.0%	72.6	NM	14.7x	SQURPHARMA	121,789	7.1%	9.8x	1.6x	ORIONINFU	687.5	+0.4%	477.5	NM	47.3x
KPPL	32.7	+9.7%	24.8	NM	NM	BATBC	74,086	4.3%	15.7x	5.2x	CENTRALPHL	33.3	+8.1%	456.9	NM	6.1x
KTL	20.6	+9.6%	136.1	42.0x	1.2x	BEXIMCO	69,196	4.0%	NM	1.2x	NRBBANK	11.9	-1.7%	390.8	19.3x	1.0x
SEMLLECMF	8.5	+9.0%	39.6	NM	0.9x	RENATA	68,042	4.0%	51.1x	3.4x	FUWANGCER	27.8	+1.8%	305.5	NM	2.3x
CENTRALPHL	33.3	+8.1%	456.9	NM	6.1x	BXPHARMA	45,564	2.7%	12.1x	1.3x	SONALIPAPR	568.0	-2.7%	249.4	NM	3.3x
STANDARINS	56.0	+6.3%	91.1	23.3x	2.6x	GP	38,700	2.3%	11.7x	5.8x	MONNOFABR	31.9	+2.9%	227.0	NM	1.3x
VFSTD	18.9	+6.2%	63.2	37.7x	1x	BEACONPHAR	34,036	2.0%	82.7x	8.6x	BESTHLDNG	38.8	-2.5%	222.0	31.2x	0.7x
MITHUNKIT	22.8	+6.0%	6.6	NM	7.2x	ISLAMIBANK	33,649	2.0%	8.5x	0.7x	FORTUNE	53.8	-3.2%	217.5	51.5x	3.5x
RUPALILIFE	134.3	+4.9%	128.2	NM	NM	BRACBANK	30,964	1.8%	9.2x	1.1x	BDTHAI	32.0	+4.9%	157.8	NM	1.2x
BDTHAI	32.0	+4.9%	157.8	NM	1.2x	LHBL	28,853	1.7%	13.6x	4.1x	CENTRALINS	59.4	-3.9%	138.6	32.8x	1.2x

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)
1STPRIMFMF	34.3	-7.0%	51.3	NM	3.2x	SONALIPAPR	623.0	623.0	3.0	301	187.72
FAREASTFIN	4.6	-6.1%	1.0	NM	NM	EBL	27.1	27.1	5.0	3,702	100.32
MONOSPOOL	210.8	-4.4%	17.4	23.9x	3.7x	AIL	92.0	90.5	6.0	358	32.82
CENTRALINS	59.4	-3.9%	138.6	32.8x	1.2x	FINEFOODS	155.0	131.4	4.0	193	27.24
PAPERPROC	168.1	-3.8%	13.5	33.3x	4.4x	RUPALILIFE	135.0	135.0	1.0	200	27.00
NAVANACNG	30.7	-3.8%	13.5	NM	1.0x	FORTUNE	58.0	57.5	2.0	456	26.38
ARAMITCEM	25.7	-3.7%	2.1	NM	NM	CENTRALINS	65.0	61.0	5.0	413	26.24
GEMINISEA	389.3	-3.5%	102.6	44.7x	19.9x	SSSTEEL	13.2	13.2	2.0	1,501	19.81
NURANI	5.6	-3.4%	0.8	NM	0.6x	KARNAPHULI	60.0	53.2	4.0	330	19.53
ITC	50.5	-3.4%	66.2	18.1x	2.6x	ORIONINFU	694.0	694.0	1.0	20	13.88

* 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
SONALIPAPR	623.0	623.0	187.7	301	3
EBL	27.1	27.1	100.3	3,702	5
AIL	92.0	90.5	32.8	358	6
FINEFOODS	155.0	131.4	27.2	193	4
RUPALILIFE	135.0	135.0	27.0	200	1
FORTUNE	58.0	57.5	26.4	456	2
CENTRALINS	65.0	61.0	26.2	413	5
SSSTEEL	13.2	13.2	19.8	1,501	2
KARNAPHULI	60.0	53.2	19.5	330	4
ORIONINFU	694.0	694.0	13.9	20	1
FUWANGCER	28.0	28.0	12.6	450	1
ISLAMICFIN	14.5	14.5	12.2	840	1
ANLIMAYARN	47.0	47.0	11.4	243	1
BESTHLDNG	43.7	40.2	10.2	242	3
RUPALIINS	39.4	39.0	9.3	236	2
BEACHHATCH	62.0	61.0	7.7	125	5
CRYSTALINS	126.2	126.2	6.3	50	1
BATBC	479.8	479.8	6.0	13	8
ADNTEL	133.0	130.0	5.5	42	3
SUNLIFEINS	48.5	48.0	5.1	106	6
IPDC	28.9	28.9	4.9	170	1
AFTABAUTO	54.6	54.6	4.3	78	1
Total			618.3		96

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
GREENDEL T		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
ROBI		0.0%	10%	Record Date	18-Mar-24
UNITEDINS		0.0%	10%	Record Date	21-Mar-24

Important DSE News

GP

As per BSEC Order No. BSEC/Surveillance/2020-975/211 dated February 06, 2024, the floor price of the company will be withdrawn after record date i.e. February 29, 2024 with effect from March 03, 2024. However, upper limit and lower limit of the circuit breaker will be applicable as per the Commission's Order No. BSEC/Surveillance/2020-975/219 dated June 17, 2021.

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