

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.04%) gained 2.65 points and closed at 6,236.07. The blue-chip index DS30 (+0.11%), the Shariah-based index DSES (+0.06%), and the large-cap index CDSET (+0.08%) closed at 2,092.13, 1,361.01, and 1,203.15 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.14%, followed by Engineering (+0.08%), NBFi (+0.08%), Telecommunication (+0.00%), Fuel & Power (-0.02%), Bank (-0.02%), and Pharmaceutical (-0.02%), respectively. Block trades contributed 10.6% of the overall market turnover. Standard Insurance Limited (+2.8%) was the most traded share with a turnover of BDT 121 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,236.07	6,233.42	+2.65	+0.04%	-0.2%
DS30	2,092.13	2,089.90	+2.24	+0.11%	-0.1%
DSES	1,361.01	1,360.16	+0.85	+0.06%	-0.2%
CDSET	1,203.15	1,202.20	+0.95	+0.08%	+0.0%

	Advanced	Declined	Unchanged	Total
All Category	57	92	180	329
A Category (Equity)	25	66	117	208
B Category (Equity)	28	22	52	102
N Category (Equity)	0	0	0	0
Z Category (Equity)	4	4	11	19
Mutual Funds	1	14	19	34
Corporate Bonds	0	0	1	1
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,806,574	7,804,000	
	Mn USD	70,969	70,945	+0.0%
Turnover	Mn BDT	2,921	5,169	-43.5%
	Mn USD	27	47	
Volume	Mn Shares	100	177	-43.6%
No. of Trade		94,245	136,247	-30.8%

* Average Interbank Exchange Rate is BDT 110.00 as of Jan 03, 2024

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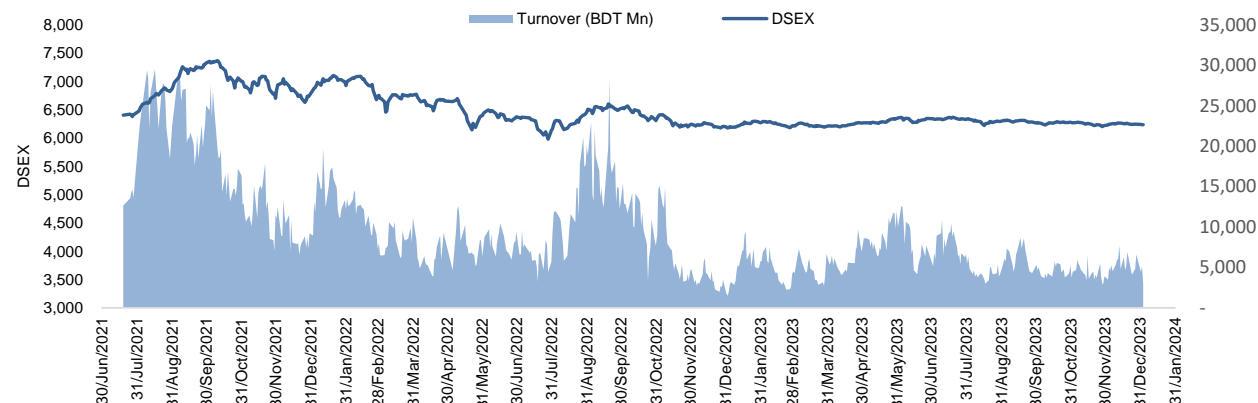


Figure: Sectorial Turnover (BDT Mn)

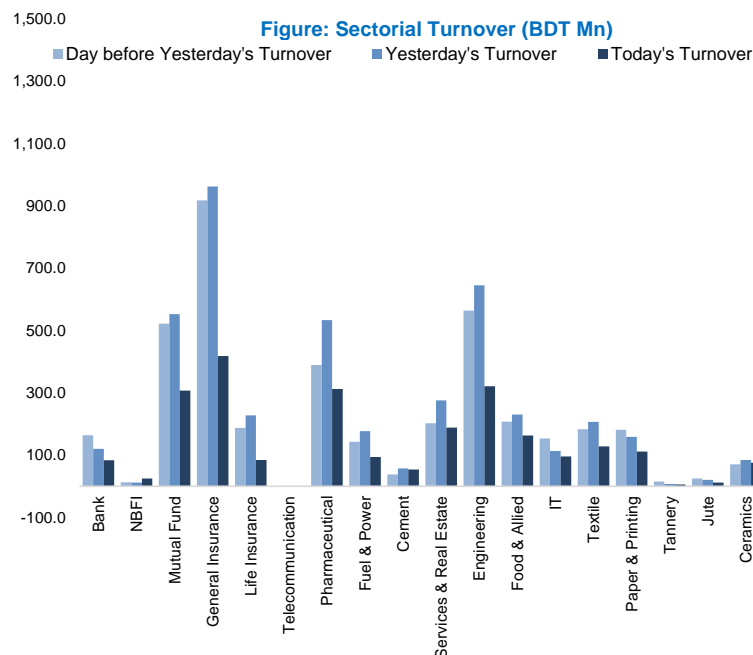
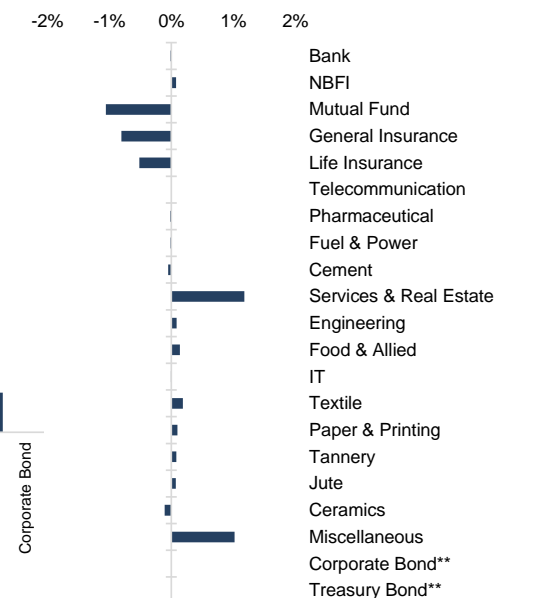


Figure: Sectorial Mcap Change



Market PE 19.4x

Market PB 1.6x

* 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	1,453	1,453	-0.25	-0.02%	35	685,486	8.8%	83.6	3.2%	12.5x	0.7x	GP	386,996	8.6%	0.3	12.5x	6.4x
NBFI	1,903	1,902	+1.48	+0.08%	23	185,215	2.4%	25.3	1.0%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	856	866	-9.12	-1.05%	37	40,506	0.5%	307.2	11.8%	NM	0.8x	BATBC	280,098	6.2%	0.3	15.4x	5.7x
General Insurance	3,536	3,565	-28.70	-0.81%	42	103,321	1.3%	418.0	16.0%	19.2x	1.6x	SQURPHARMA	185,977	4.1%	35.6	9.5x	1.5x
Life Insurance	2,612	2,626	-13.56	-0.52%	15	73,010	0.9%	84.7	3.2%	NM	NM	ROBI	157,138	3.5%	0.1	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.4%	0.3	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,724	3,724	-0.80	-0.02%	33	719,749	9.2%	312.6	12.0%	19.6x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,691	1,691	-0.26	-0.02%	23	446,083	5.7%	93.8	3.6%	44.5x	1.1x	BEXIMCO	103,571	2.3%	0.5	34.2x	1.2x
Cement	2,508	2,509	-1.21	-0.05%	7	120,567	1.5%	53.5	2.0%	17.0x	2.6x	BERGERPBL	85,266	1.9%	7.6	27.6x	6.8x
Services & Real Estate	1,511	1,494	+17.64	+1.18%	8	59,714	0.8%	187.9	7.2%	19.6x	0.8x	LHBL	80,483	1.8%	27.9	12.7x	3.8x
Engineering	4,511	4,508	+3.81	+0.08%	42	529,836	6.8%	321.4	12.3%	27.0x	1.9x	ICB	72,342	1.6%	0.0	NM	1.7x
Food & Allied	21,160	21,131	+28.98	+0.14%	21	391,534	5.0%	163.2	6.2%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,863	2,863	-0.18	-0.01%	11	37,321	0.5%	96.0	3.7%	29.5x	2.4x	BRACBANK	57,596	1.3%	0.1	7.7x	0.9x
Textile	1,652	1,649	+3.09	+0.19%	58	171,043	2.2%	128.3	4.9%	NM	1.2x	BEACONPHAR	56,595	1.3%	0.2	86.9x	9.0x
Paper & Printing	9,988	9,978	+9.88	+0.10%	6	38,484	0.5%	111.6	4.3%	58.2x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,093	3,090	+2.55	+0.08%	6	35,013	0.4%	6.1	0.2%	57.6x	3.2x	DUTCHBANGL	44,203	1.0%	0.0	8.0x	1.0x
Jute	17,723	17,710	+12.69	+0.07%	3	4,273	0.1%	11.8	0.5%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	688	688	-0.74	-0.11%	5	31,803	0.4%	75.5	2.9%	53.0x	1.9x	UNILEVERCL	38,936	0.9%	3.9	39.4x	18.8x
Miscellaneous	4,336	4,292	+43.82	+1.02%	14	236,070	3.0%	127.6	4.9%	27.0x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	4,525	4,525	-	-	13	45,374	0.6%	0.1	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.00	+0.00%	242	3,257,264	41.8%	3.4	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
WMSHIPYARD	12.3	+7.9%	28.9	NM	0.7x	SQURPHARMA	121,499	7.0%	9.5x	1.5x	STANDARINS	59.7	+2.8%	120.7	24.9x	2.8x
OAL	16.2	+6.6%	92.9	NM	1.5x	BATBC	74,086	4.3%	15.4x	5.7x	SEAPEARL	99.6	+4.5%	109.1	16.2x	5.4x
CENTRALPHL	18.8	+6.2%	71.7	NM	3.4x	BEXIMCO	69,196	4.0%	34.2x	1.2x	BDTHAI	27.3	-1.4%	102.1	NM	1.0x
PDL	12.8	+5.8%	44.7	NM	0.9x	RENATA	68,042	3.9%	66.1x	4.4x	OAL	16.2	+6.6%	92.9	NM	1.5x
UNIONCAP	9.2	+5.7%	20.5	NM	NM	BXPBARMA	45,564	2.6%	13.8x	1.4x	ORIONINFU	358.9	-1.9%	90.5	NM	24.0x
ETL	11.5	+5.5%	34.4	25.0x	0.9x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	KPPL	26.9	+3.5%	88.3	NM	NM
SAMORITA	83.3	+4.8%	59.4	NM	2x	GP	38,700	2.2%	12.5x	6.4x	GLDNJMF	13.3	-8.9%	79.3	NM	1.3x
SEAPEARL	99.6	+4.5%	109.1	16.2x	5.4x	BRACBANK	30,964	1.8%	7.7x	0.9x	INTRACO	39.9	-2.2%	73.6	36.3x	3.2x
MIDASFIN	11.0	+3.8%	4.4	NM	1.4x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	CENTRALPHL	18.8	+6.2%	71.7	NM	3.4x
KPPL	26.9	+3.5%	88.3	NM	NM	LHBL	28,562	1.6%	12.7x	3.8x	SAMORITA	83.3	+4.8%	59.4	NM	1.7x

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)
PRIME1CBA	8.2	-9.9%	30.5	NM	1.3x	NBL	19,116	1.1%	NM	0.9x	GP	261.6	261.6	16.0	341	89.27
GLDNJMF	13.3	-8.9%	79.3	NM	1x	CITYBANK	18,190	1.0%	5.2x	0.7x	SEAPEARL	86.0	86.0	3.0	362	31.15
1STPRIMFMF	29.8	-4.5%	33.7	NM	2.8x	OLYMPIC	16,066	0.9%	18.7x	2.9x	BRACBANK	33.5	32.9	20.0	770	25.46
NCCBLMF1	7.2	-4.0%	3.8	NM	0.8x	ROBI	15,714	0.9%	52.6x	2.4x	BEXIMCO	105.9	104.8	4.0	210	22.18
ICBEPMF1S1	7.5	-3.8%	2.1	NM	1.4x	ALARABANK	14,357	0.8%	12.5x	1.1x	BSC	107.0	106.0	4.0	200	21.38
IFILISLMF1	7.5	-3.8%	46.2	NM	1.2x	BSRMLTD	14,210	0.8%	5.2x	0.6x	ORIONPHARM	71.9	71.8	4.0	220	15.81
ICBSONALI1	7.9	-3.7%	24.0	NM	1.2x	SEAPEARL	13,733	0.8%	16.2x	5.4x	LHBL	76.0	62.5	2.0	154	11.22
FUWANGFOOD	25.1	-3.1%	47.8	NM	9.6x	UPGDCL	13,547	0.8%	19.6x	4.1x	ACMEPL	35.3	31.9	4.0	265	8.80
PREMIERCEM	51.1	-3.0%	3.8	NM	0.9x	PRIMEBANK	13,491	0.8%	5.1x	0.7x	EMERALDOIL	60.5	60.1	4.0	135	8.13
PARAMOUNT	57.1	-2.9%	13.8	46.8x	2.2x						AL-HAJTEX	134.0	133.9	5.0	50	6.67

* 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 (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
GP	261.6	261.6	89.3	341	16
SEAPEARL	86.0	86.0	31.1	362	3
BRACBANK	33.5	32.9	25.5	770	20
BEXIMCO	105.9	104.8	22.2	210	4
BSC	107.0	106.0	21.4	200	4
ORIONPHARM	71.9	71.8	15.8	220	4
LHBL	76.0	62.5	11.2	154	2
ACMEPL	35.3	31.9	8.8	265	4
EMERALDOIL	60.5	60.1	8.1	135	4
AL-HAJTEX	134.0	133.9	6.7	50	5
SONALIPAPR	609.9	569.0	6.4	11	3
BBSCABLES	45.0	45.0	4.5	100	2
BEACONPHAR	223.7	223.6	4.2	19	4
POWERGRID	47.2	47.2	3.7	78	3
CITYBANK	19.3	19.3	3.4	176	3
STANDARINS	56.0	56.0	3.4	60	1
BSCCL	199.8	199.8	3.0	15	3
PREMIERCEM	51.8	51.8	2.6	50	1
FIRSTSBANK	8.1	8.1	2.5	310	5
MJLBD	81.5	81.5	2.4	30	1
BDFINANCE	41.0	41.0	2.2	54	1
SINOBANGLA	66.4	66.4	2.1	31	1
Total			309.4		130

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

Important DSE News
PHOENIXFIN

The Company has informed that as per decision taken by the Board of Directors of the Company, Mr. Mohammad Sayduzzaman FCA, FCS, Deputy Managing Director of the Company has assumed the office of the Managing Director (Current Charge) with effect from January 01, 2024.

BBS

The Company has informed that it has shifted its Investor Relation Department at 01 Mohakhali C/A, Advanced Noorani Tower (Level-08), Dhaka-1212 from Ga-64, Configure Bepari Tower, Middle Badda, Dhaka-1212 with effect from January 03, 2024.

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