

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.03%) lost 1.69 points and closed at 6,267.82. The blue-chip index DS30 (-0.02%), the Shariah-based index DSES (+0.03%), and the large-cap index CDSET (+0.02%) closed at 2,101.90, 1,367.37, and 1,207.01 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.19%, followed by NBFI (+0.18%), Pharmaceutical (+0.06%), Engineering (+0.01%), Telecommunication (+0.00%), Fuel & Power (-0.02%), and Food & Allied (-0.06%), respectively. Block trades contributed 7.6% of the overall market turnover. Bd.Thai Aluminium Ltd. (-5.4%) was the most traded share with a turnover of BDT 255 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,267.82	6,269.51	-1.69	-0.03%	+0.3%
DS30	2,101.90	2,102.23	-0.33	-0.02%	+0.4%
DSES	1,367.37	1,367.01	+0.36	+0.03%	+0.2%
CDSET	1,207.01	1,206.72	+0.29	+0.02%	+0.3%

	Advanced	Declined	Unchanged	Total
All Category	53	110	183	346
A Category (Equity)	24	75	113	212
B Category (Equity)	29	28	56	113
N Category (Equity)	0	0	0	0
Z Category (Equity)	0	7	14	21
Mutual Funds	2	12	19	33
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,838,989	7,825,537	
	Mn USD	71,264	71,141	+0.2%
Turnover	Mn BDT	4,954	4,411	
	Mn USD	45	40	+12.3%
Volume	Mn Shares	172	153	+12.1%
No. of Trade		137,751	125,185	+10.0%

* Average Interbank Exchange Rate is BDT 110.00 as of Jan 09, 2024

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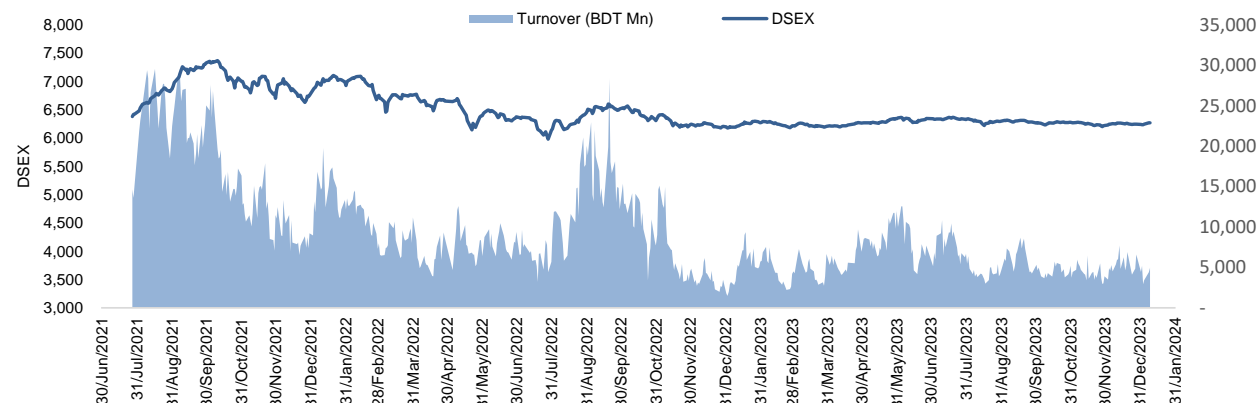


Figure: Sectorial Turnover (BDT Mn)

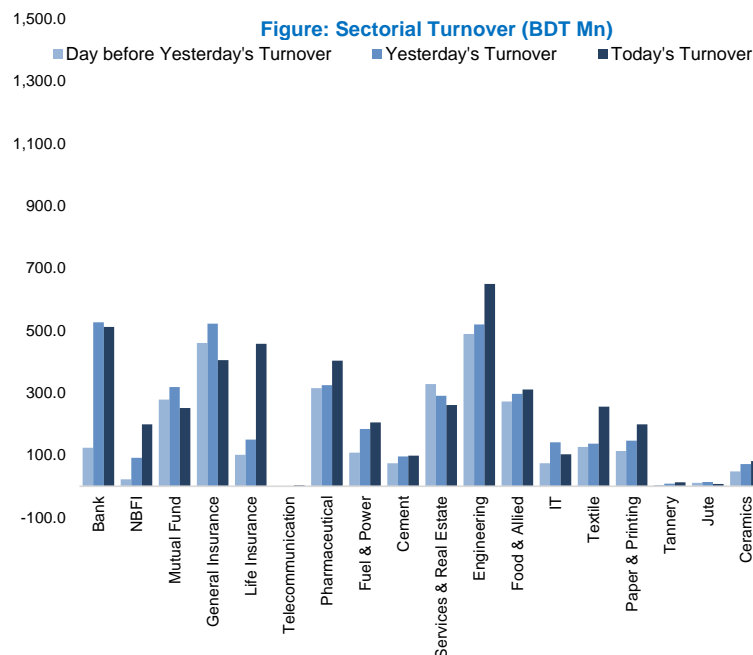
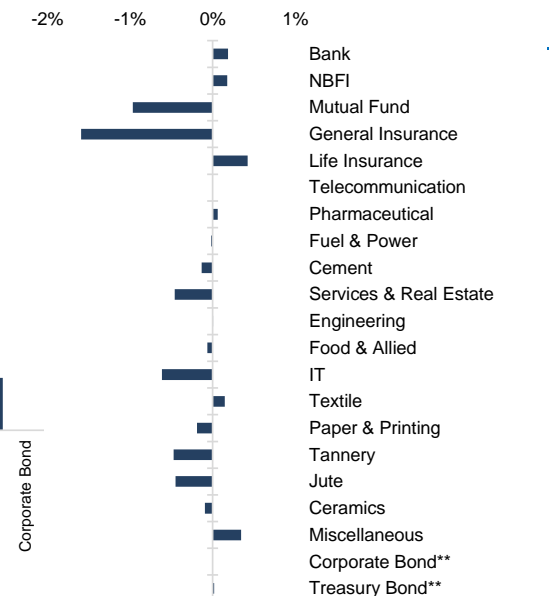


Figure: Sectorial Mcap Change



Market PE 19.5x

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	1,473	1,470	+2.73	+0.19%	35	694,641	8.9%	511.6	11.2%	12.7x	0.7x	GP	386,996	8.5%	2.4	12.5x	6.4x
NBFI	1,912	1,908	+3.38	+0.18%	23	186,012	2.4%	198.6	4.3%	NM	NM	WALTONHIL	317,378	7.0%	0.0	30.8x	4.2x
Mutual Fund	860	868	-8.39	-0.97%	37	40,666	0.5%	250.8	5.5%	NM	0.8x	BATBC	280,098	6.2%	1.6	15.4x	5.7x
General Insurance	3,536	3,593	-57.16	-1.59%	42	103,318	1.3%	405.1	8.8%	19.2x	1.6x	SQURPHARMA	186,687	4.1%	38.5	9.6x	1.5x
Life Insurance	2,645	2,634	+11.14	+0.42%	15	73,929	0.9%	457.1	10.0%	NM	NM	ROBI	157,138	3.5%	0.3	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.4%	2.7	0.1%	16.0x	4.1x	RENATA	139,689	3.1%	0.2	66.1x	4.4x
Pharmaceutical	3,737	3,735	+2.26	+0.06%	33	722,317	9.2%	403.0	8.8%	19.7x	2.2x	UPGDCL	135,475	3.0%	1.0	19.6x	4.1x
Fuel & Power	1,692	1,693	-0.30	-0.02%	23	446,366	5.7%	204.9	4.5%	44.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,535	2,538	-3.35	-0.13%	7	121,860	1.6%	98.0	2.1%	17.2x	2.6x	BERGERPBL	84,412	1.9%	8.1	27.3x	6.7x
Services & Real Estate	1,535	1,542	-7.07	-0.46%	8	60,639	0.8%	261.1	5.7%	19.9x	0.8x	LHBL	81,296	1.8%	49.3	12.8x	3.8x
Engineering	4,519	4,519	+0.31	+0.01%	42	530,789	6.8%	649.2	14.2%	27.1x	1.9x	ICB	72,342	1.6%	0.0	NM	1.7x
Food & Allied	21,194	21,208	-13.39	-0.06%	21	392,177	5.0%	310.3	6.8%	19.7x	6.9x	BXPBARMA	65,222	1.4%	0.0	13.8x	1.4x
IT	2,872	2,889	-17.70	-0.61%	11	37,440	0.5%	102.3	2.2%	29.6x	2.5x	BRACBANK	57,596	1.3%	2.7	7.7x	0.9x
Textile	1,657	1,655	+2.41	+0.15%	58	171,613	2.2%	255.8	5.6%	NM	1.2x	BEACONPHAR	56,595	1.2%	0.1	86.9x	9.0x
Paper & Printing	10,084	10,103	-19.08	-0.19%	6	38,854	0.5%	199.1	4.3%	58.7x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,097	3,111	-14.64	-0.47%	6	35,060	0.4%	12.6	0.3%	57.7x	3.2x	DUTCHBANGL	44,352	1.0%	18.1	8.0x	1.0x
Jute	17,714	17,794	-80.03	-0.45%	3	4,125	0.1%	7.9	0.2%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	690	691	-0.65	-0.09%	5	31,923	0.4%	80.9	1.8%	53.2x	1.9x	UNILEVERCL	38,971	0.9%	2.0	39.4x	18.8x
Miscellaneous	4,339	4,324	+14.98	+0.35%	14	236,248	3.0%	167.8	3.7%	27.1x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.3x
Corporate Bond**	4,525	4,525	-	-	13	45,374	0.6%	0.2	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	+0.02	+0.02%	242	3,257,849	41.7%	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
KPPL	29.0	+9.8%	158.6	NM	NM	SQURPHARMA	121,499	7.0%	9.6x	1.5x	BDTHAI	29.7	-5.4%	254.6	NM	1.1x
ARAMITCEM	26.8	+9.8%	32.1	NM	NM	BATBC	74,086	4.3%	15.4x	5.7x	MEGHNALIFE	83.9	+3.1%	225.4	NM	NM
ETL	12.9	+9.3%	79.1	28.0x	1.0x	BEXIMCO	69,196	4.0%	34.2x	1.2x	RUPALIBANK	37.5	+7.1%	212.7	27.9x	1.0x
UNIONCAP	11.0	+8.9%	131.4	NM	NM	RENATA	68,042	3.9%	66.1x	4.4x	INTRACO	42.1	-1.4%	183.0	38.3x	3.4x
MIDASFIN	13.3	+8.1%	26.3	NM	1.7x	BXPBARMA	45,564	2.6%	13.8x	1.4x	SEAPPEARL	101.9	-1.5%	166.7	16.5x	5.5x
ANLIMAYARN	35.8	+7.5%	28.3	NM	3.5x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	KPPL	29.0	+9.8%	158.6	NM	NM
RUPALIBANK	37.5	+7.1%	212.7	27.9x	1x	GP	38,700	2.2%	12.5x	6.4x	UNIONCAP	11.0	+8.9%	131.4	NM	NM
AIBL1STIMF	7.8	+5.4%	10.7	NM	0.8x	BRACBANK	30,964	1.8%	7.7x	0.9x	MIDLANDBNK	15.8	+1.9%	125.8	12.4x	1.2x
MONNOAGML	572.2	+5.1%	34.9	NM	4.3x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	CENTRALPHL	19.4	+3.7%	117.6	NM	3.5x
PDL	13.6	+4.6%	74.4	NM	1.0x	LHBL	28,562	1.6%	12.8x	3.8x	OAL	16.2	+3.8%	111.9	NM	1.5x

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)
IFILISLMF1	7.0	-6.7%	32.2	NM	1.1x	DBH	56.3	51.1	4.0	3,000	158.50
GLDNJMF	13.5	-5.6%	51.0	NM	1x	SEAPPEARL	93.3	93.3	3.0	594	55.42
BDTHAI	29.7	-5.4%	254.6	NM	1.1x	SONALIPAPR	571.5	569.0	4.0	42	23.63
PRIME1ICBA	7.8	-4.9%	20.2	NM	1.3x	BEXIMCO	106.0	104.1	6.0	131	13.78
CAPMIBBLMF	13.0	-4.4%	8.5	NM	1.4x	BSC	107.0	107.0	1.0	100	10.70
EASTERNINS	69.6	-4.1%	32.9	24.8x	1.4x	ACMELAB	77.0	76.5	11.0	121	9.24
NITOLINS	36.7	-3.7%	5.9	18.7x	1.2x	NBL	9.0	9.0	1.0	1,000	9.00
STANDARINS	55.8	-3.3%	83.3	23.3x	2.6x	1STPRIMFMF	34.4	32.0	5.0	231	7.47
CRYSTALINS	94.1	-3.2%	17.9	30.8x	3.7x	NAVANAPHAR	78.6	78.6	2.0	92	7.23
CAPITECGBF	12.7	-3.1%	20.8	NM	1.3x	UNIQUEHRL	60.0	55.2	2.0	106	6.14

* 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 (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
DBH	56.3	51.1	158.5	3,000	4
SEAPPEARL	93.3	93.3	55.4	594	3
SONALIPAPR	571.5	569.0	23.6	42	4
BEXIMCO	106.0	104.1	13.8	131	6
BSC	107.0	107.0	10.7	100	1
ACMELAB	77.0	76.5	9.2	121	11
NBL	9.0	9.0	9.0	1,000	1
1STPRIMFMF	34.4	32.0	7.5	231	5
NAVANAPHAR	78.6	78.6	7.2	92	2
UNIQUEHRL	60.0	55.2	6.1	106	2
MIDLANDBNK	15.2	15.2	6.1	400	2
BRACBANK	34.7	34.3	5.9	172	9
IFIC	10.6	10.1	5.1	496	9
GP	265.0	261.6	5.1	19	5
EMERALDOIL	73.9	66.7	5.0	75	3
EIL	37.0	37.0	2.6	71	3
EASTERNINS	79.2	79.2	2.5	32	1
RUPALILIFE	115.0	115.0	2.3	20	1
RUPALIBANK	36.1	35.3	1.9	53	2
POWERGRID	51.4	47.3	1.8	37	3
BBSCABLES	49.8	45.0	1.8	37	3
PREMIERCEM	53.0	53.0	1.8	34	1
Total			374.9		121

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

Important DSE News

EASTRNLUB

(Q2 Un-audited): EPS was Tk. 3.30 for October-December 2023 as against Tk. 6.26 for October-December 2022; EPS was Tk. 5.47 for July-December 2023 as against Tk. 6.51 for July-December 2022. NOCFPS was Tk. 20.66 for July-December 2023 as against Tk. (95.98) for July-December 2022. NAV per share was Tk. 194.10 as on December 31, 2023 and Tk. 188.63 as on June 30, 2023 Reasons for deviation in EPS and NOCFPS: EPS has been decrease due to decreased in revenue as compared to last year's corresponding periods. NOCFPS has been increase due to increased Creditors and Accruals.

SIBL

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Social Islami Bank PLC.' instead of 'Social Islami Bank Limited' with effect from January 10, 2024. Other things (except name) will remain unchanged.

NCCBANK

Dhaka Stock Exchange Limited (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'National Credit and Commerce Bank PLC.' instead of 'National Credit and Commerce Bank Limited' with effect from January 10, 2024. Other things (except name) will remain unchanged.

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