

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.02%) gained 1.11 points and closed at 6,302.81. The blue-chip index DS30 (+0.08%), the Shariah-based index DSES (-0.17%), and the large-cap index CDSET (+0.09%) closed at 2,119.61, 1,373.59, and 1,210.21 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.09%, followed by Food & Allied (+0.01%), Telecommunication (+0.00%), Fuel & Power (-0.06%), Engineering (-0.09%), Bank (-0.14%), and NBFI (-0.16%), respectively. Block trades contributed 10.4% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+7.7%) was the most traded share with a turnover of BDT 333 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,302.81	6,301.70	+1.11	+0.02%	+0.9%
DS30	2,119.61	2,117.91	+1.70	+0.08%	+1.2%
DSES	1,373.59	1,375.92	-2.32	-0.17%	+0.7%
CDSET	1,210.21	1,209.13	+1.08	+0.09%	+0.6%

	Advanced	Declined	Unchanged	Total
All Category	81	99	175	355
A Category (Equity)	67	42	108	217
B Category (Equity)	12	50	53	115
N Category (Equity)	0	0	0	0
Z Category (Equity)	2	7	14	23
Mutual Funds	13	1	22	36
Corporate Bonds	0	0	1	1
Treasury Bonds	0	2	0	2

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,861,884	7,861,987	-0.0%
	Mn USD	71,472	71,473	
Turnover	Mn BDT	7,649	7,528	+1.6%
	Mn USD	70	68	
Volume	Mn Shares	203	220	-7.9%
No. of Trade		178,660	194,771	-8.3%

\* Average Interbank Exchange Rate is BDT 110.00 as of Jan 14, 2024

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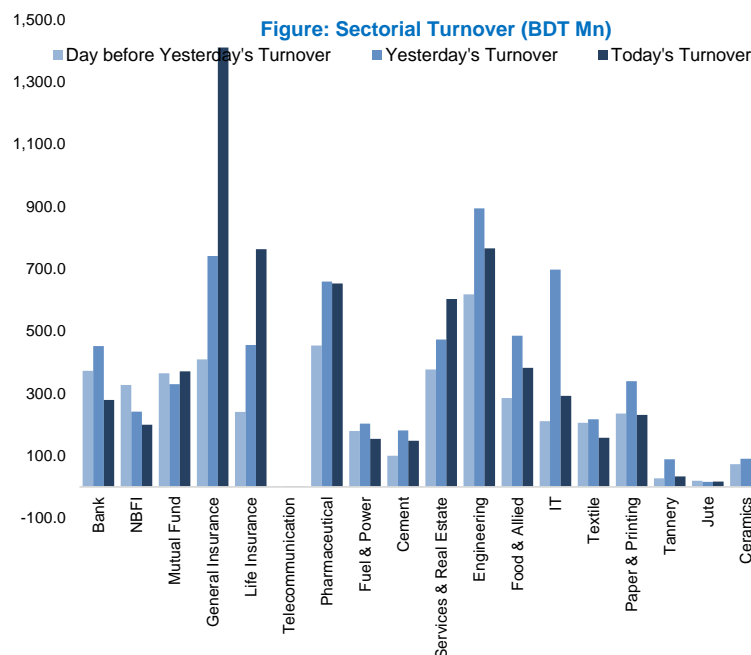
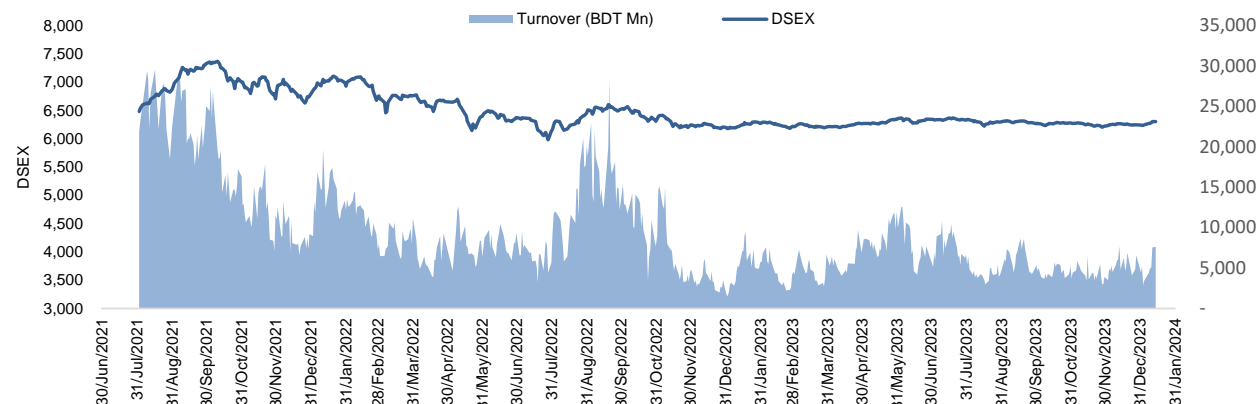
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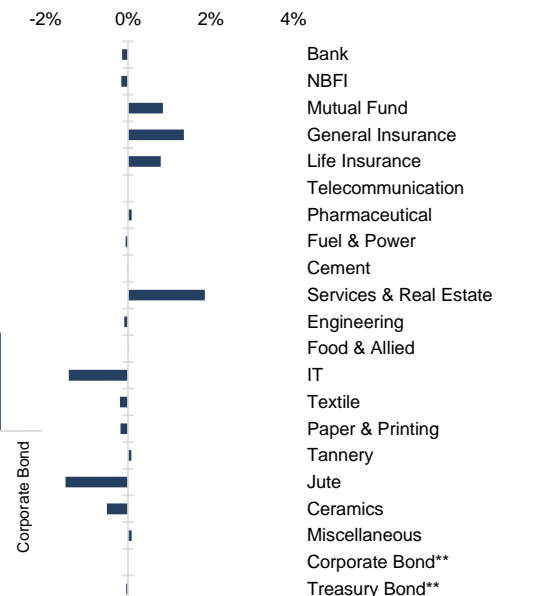
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**Figure: Sectorial Mcap Change**



Market PE 19.6x

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	1,471	1,473	-2.05	-0.14%	35	693,677	8.8%	279.0	4.1%	12.6x	0.7x	GP	386,996	8.5%	0.9	12.5x	6.4x
NBFI	1,911	1,914	-3.13	-0.16%	23	185,994	2.4%	199.5	2.9%	NM	NM	WALTONHIL	317,378	7.0%	0.1	30.8x	4.2x
Mutual Fund	872	864	+7.29	+0.84%	37	41,221	0.5%	370.9	5.4%	NM	0.8x	BATBC	280,098	6.1%	0.8	15.4x	5.7x
General Insurance	3,670	3,621	+48.99	+1.35%	42	107,224	1.4%	1,409.6	20.6%	19.9x	1.7x	SQRPHARMA	186,953	4.1%	31.6	9.6x	1.5x
Life Insurance	2,700	2,678	+21.24	+0.79%	15	75,459	1.0%	762.8	11.1%	NM	NM	ROBI	157,138	3.4%	0.1	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.4%	1.0	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.6	66.1x	4.4x
Pharmaceutical	3,755	3,751	+3.44	+0.09%	33	725,767	9.3%	652.9	9.5%	19.8x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,692	1,693	-0.95	-0.06%	23	446,384	5.7%	154.1	2.3%	44.6x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,586	2,586	-0.23	-0.01%	7	124,298	1.6%	147.8	2.2%	17.6x	2.7x	BERGERPBL	86,175	1.9%	1.4	27.9x	6.8x
Services & Real Estate	1,629	1,600	+29.76	+1.86%	8	64,378	0.8%	603.0	8.8%	21.2x	0.8x	LHBL	83,038	1.8%	81.9	13.1x	3.9x
Engineering	4,519	4,523	-3.92	-0.09%	42	530,701	6.8%	765.6	11.2%	27.1x	1.9x	ICB	72,342	1.6%	0.0	NM	1.7x
Food & Allied	21,240	21,237	+2.65	+0.01%	21	393,024	5.0%	381.8	5.6%	19.7x	6.9x	BXPHARMA	65,222	1.4%	0.7	13.8x	1.4x
IT	2,975	3,018	-43.28	-1.43%	11	38,786	0.5%	292.4	4.3%	30.7x	2.5x	BRACBANK	57,596	1.3%	0.9	7.7x	0.9x
Textile	1,655	1,659	-3.27	-0.20%	58	171,438	2.2%	158.0	2.3%	NM	1.2x	BEACONPHAR	56,595	1.2%	0.2	86.9x	9.0x
Paper & Printing	10,428	10,447	-18.77	-0.18%	6	40,179	0.5%	230.9	3.4%	60.7x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,139	3,137	+2.57	+0.08%	6	35,540	0.5%	33.4	0.5%	58.5x	3.3x	DUTCHBANGL	44,203	1.0%	4.9	8.0x	1.0x
Jute	17,122	17,385	-263.18	-1.51%	3	3,987	0.1%	16.9	0.2%	NM	NM	TITASVAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	688	691	-3.55	-0.51%	5	31,813	0.4%	73.3	1.1%	53.0x	1.9x	UNILEVERCL	39,121	0.9%	1.4	39.5x	18.9x
Miscellaneous	4,398	4,394	+3.79	+0.09%	14	239,961	3.1%	315.6	4.6%	27.5x	1.9x	POWERGRID	37,347	0.8%	0.1	NM	0.3x
Corporate Bond**	4,525	4,525	-	-	13	45,374	0.6%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	12.1x	0.9x
Treasury Bond**	86	86	-0.04	-0.05%	242	3,268,899	41.7%	1.9	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
KARNAPHULI	42.2	+9.9%	165.5	25.0x	2.0x	SQRPHARMA	121,499	7.0%	9.6x	1.5x	SEAPPEARL	119.0	+7.7%	333.0	19.3x	6.5x
SANDHANINS	30.4	+9.7%	91.0	NM	NM	BATBC	74,086	4.3%	15.4x	5.7x	RUPALILIFE	131.9	+1.7%	320.6	NM	NM
ORIONINFU	406.0	+8.7%	302.9	NM	27.2x	BEXIMCO	69,196	4.0%	34.2x	1.2x	ORIONINFU	406.0	+8.7%	302.9	NM	27.2x
1STPRIMFMF	37.8	+8.0%	111.2	NM	3.6x	RENATA	68,042	3.9%	66.1x	4.4x	BDTHAI	26.2	-9.3%	213.6	NM	0.9x
SEAPPEARL	119.0	+7.7%	333.0	19.3x	6.5x	BXPHARMA	45,564	2.6%	13.8x	1.4x	DESHBANDHU	40.5	-0.5%	192.6	67.5x	2.1x
GLDNJMF	14.1	+5.2%	51.8	NM	1.4x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	MEGHNALIFE	89.4	+1.1%	192.1	NM	NM
SAPORTL	28.8	+5.1%	69.4	25.7x	1x	GP	38,700	2.2%	12.5x	6.4x	KARNAPHULI	42.2	+9.9%	165.5	25.0x	2.0x
EMERALDOIL	83.8	+4.7%	126.5	42.3x	NM	BRACBANK	30,964	1.8%	7.7x	0.9x	CRYSTALINS	102.0	+1.4%	155.2	33.3x	4.0x
MEGHNAINS	39.7	+4.7%	28.2	17.1x	2.8x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	EASTERNINS	73.0	-1.2%	151.3	26.0x	1.4x
DBH1STMF	7.2	+4.3%	10.4	NM	0.8x	LHBL	28,562	1.6%	13.1x	3.9x	BSC	113.8	-0.3%	141.1	7.0x	1.3x

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)
BDTHAI	26.2	-9.3%	213.6	NM	0.9x	SEAPPEARL	105.0	100.0	20.0	1,625	163.25
CENTRALPHL	16.7	-7.7%	88.1	NM	3x	RUPALILIFE	135.0	128.0	3.0	1,118	150.77
KPPL	25.3	-7.0%	87.9	NM	NM	BEACONPHAR	245.0	224.0	5.0	411	100.55
FASFIN	5.8	-6.5%	26.7	NM	NM	GP	271.0	261.6	12.0	237	62.87
OAL	14.6	-5.8%	87.3	NM	1.3x	SONALIPAPR	571.0	569.0	7.0	65	37.03
STANCERAM	127.3	-5.1%	15.5	NM	NM	DESHBANDHU	40.5	40.5	1.0	500	20.25
SHYAMPSUG	180.8	-5.1%	8.1	NM	NM	PRAGATILIF	110.0	101.0	8.0	168	17.30
RUPALIBANK	36.3	-5.0%	114.4	27.0x	1.0x	KARNAPHULI	40.0	40.0	4.0	426	17.04
FUWANGFOOD	26.8	-4.6%	68.7	NM	10.3x	EASTERNINS	75.0	75.0	1.0	208	15.60
ILFSL	6.3	-4.5%	27.5	NM	NM	ORIONPHARM	71.7	71.7	15.0	196	14.05

\* 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
SEAPEARL	105.0	100.0	163.3	1,625	20
RUPALILIFE	135.0	128.0	150.8	1,118	3
BEACONPHAR	245.0	224.0	100.6	411	5
GP	271.0	261.6	62.9	237	12
SONALIPAPR	571.0	569.0	37.0	65	7
DESHBANDHU	40.5	40.5	20.3	500	1
PRAGATILIF	110.0	101.0	17.3	168	8
KARNAPHULI	40.0	40.0	17.0	426	4
EASTERNINS	75.0	75.0	15.6	208	1
ORIONPHARM	71.7	71.7	14.1	196	15
ACMEPL	35.4	31.9	13.5	408	11
CRYSTALINS	98.0	97.0	13.0	134	3
BEXIMCO	104.3	104.1	11.6	112	7
SALVOCHEM	55.8	55.8	11.2	200	1
BEACHHATCH	51.8	51.8	11.0	213	1
ACMELAB	79.5	76.9	10.1	130	14
NBL	9.0	9.0	9.0	1,000	1
POWERGRID	52.4	48.5	7.8	151	8
EHL	95.0	95.0	6.4	67	1
EGEN	45.2	40.7	5.4	130	3
YPL	27.0	27.0	5.2	192	1
SONALIANS	613.5	555.0	4.8	8	6
<b>Total</b>			<b>799.1</b>		<b>219</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

#### Important DSE News

##### BXPHARMA

The company has announced that Mr. Nazmul Hassan MP, the company's Managing Director and Member of the Board, will step down with immediate effect. This follows an invitation from the Prime Minister for Mr. Hassan to join the newly formed Cabinet as a Minister after the recent Bangladesh Parliamentary Election on January 07, 2024.

##### WALTONHIL

Mr. S. M. Ashraful Alam, one of the Sponsor Directors of the Company, has expressed his intention to sell 150,000 shares out of his holding of 65,855,111 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange Limited within next 30 working days.

##### ILFSL

The Company has informed that Mr. Kazi Alamgir has joined as the Managing Director of the Company on January 11, 2024 as per the approval of Bangladesh Bank.

##### BARKAPOWER

Fusion Holdings (Pvt.) Limited, one of the Corporate Directors of the Company, has expressed its intention to sell 3,00,000 shares out of its holding of 1,97,87,992 shares of the Company at prevailing market price (In the Public/Block Market) through Dhaka Stock Exchange Limited (DSE) within next 30 working days.

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