

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.24%) gained 15.27 points and closed at 6,318.08. The blue-chip index DS30 (+0.18%), the Shariah-based index DSES (+0.24%), and the large-cap index CDSET (+0.02%) closed at 2,123.33, 1,376.88, and 1,210.49 points, respectively. All the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.33% followed by Food & Allied (+0.30%), NBF (0.29%), Bank (+0.28%), Fuel & Power (+0.06%), Engineering (+0.04%), and Telecommunication (0.00%), respectively. Block trades contributed 6.2% of the overall market turnover. Orion Infusion Ltd. (+8.7%) was the most traded share with a turnover of BDT 396 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,318.08	6,302.81	+15.27	+0.24%	+1.1%
DS30	2,123.33	2,119.61	+3.72	+0.18%	+1.4%
DSES	1,376.88	1,373.59	+3.29	+0.24%	+0.9%
CDSET	1,210.49	1,210.21	+0.28	+0.02%	+0.6%

	Advanced	Declined	Unchanged	Total
All Category	101	68	169	338
A Category (Equity)	64	44	101	209
B Category (Equity)	32	22	54	108
N Category (Equity)	0	0	1	1
Z Category (Equity)	5	2	13	20
Mutual Funds	1	12	19	32
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,873,128	7,861,884	
	Mn USD	71,574	71,472	+0.1%
Turnover	Mn BDT	6,743	7,649	-11.9%
	Mn USD	61	70	
Volume	Mn Shares	176	203	-13.2%
No. of Trade		162,732	178,660	-8.9%

* Average Interbank Exchange Rate is BDT 110.00 as of Jan 15, 2024

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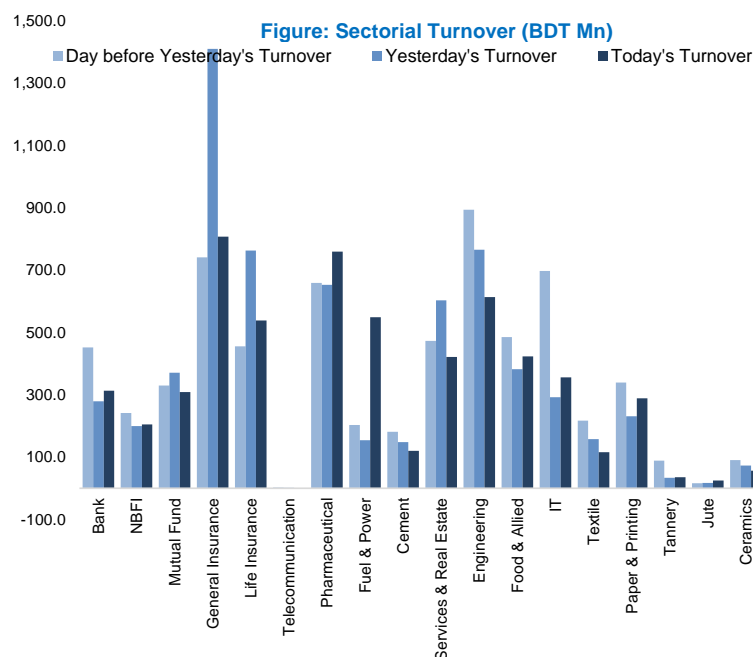
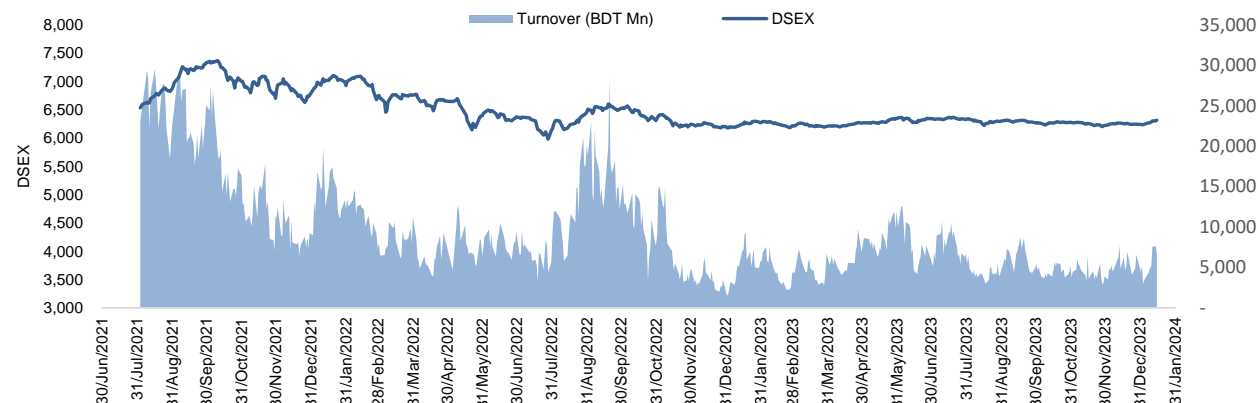
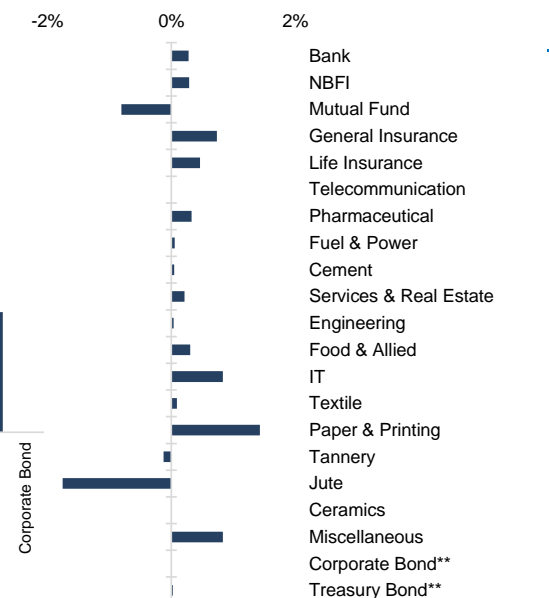


Figure: Sectorial Mcap Change



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	1,475	1,471	+4.09	+0.28%	35	695,606	8.9%	313.0	4.9%	12.7x	0.7x	GP	386,996	8.5%	0.1	12.5x	6.4x
NBFI	1,917	1,911	+5.48	+0.29%	23	186,527	2.4%	205.2	3.2%	NM	NM	WALTONHIL	317,378	6.9%	0.1	30.8x	4.2x
Mutual Fund	865	872	-7.03	-0.81%	37	40,889	0.5%	308.6	4.9%	NM	0.8x	BATBC	280,098	6.1%	1.5	15.4x	5.7x
General Insurance	3,697	3,670	+27.03	+0.74%	42	108,014	1.4%	807.6	12.8%	20.1x	1.7x	SQURPHARMA	186,864	4.1%	42.9	9.6x	1.5x
Life Insurance	2,712	2,700	+12.49	+0.46%	15	75,808	1.0%	538.2	8.5%	NM	NM	ROBI	157,138	3.4%	0.1	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.4%	0.2	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,767	3,755	+12.26	+0.33%	33	728,136	9.3%	759.6	12.0%	19.8x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,693	1,692	+0.96	+0.06%	23	446,637	5.7%	548.7	8.7%	44.7x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,587	2,586	+1.15	+0.04%	7	124,353	1.6%	120.5	1.9%	17.6x	2.7x	BERGERPBL	86,676	1.9%	3.1	28.1x	6.9x
Services & Real Estate	1,633	1,629	+3.46	+0.21%	8	64,515	0.8%	421.9	6.7%	21.2x	0.8x	LHBL	82,806	1.8%	82.4	13.0x	3.9x
Engineering	4,520	4,519	+1.76	+0.04%	42	530,908	6.8%	613.1	9.7%	27.1x	1.9x	ICB	72,342	1.6%	0.0	NM	1.7x
Food & Allied	21,305	21,240	+64.48	+0.30%	21	394,217	5.0%	423.3	6.7%	19.8x	6.9x	BXPBARMA	65,222	1.4%	0.4	13.8x	1.4x
IT	3,000	2,975	+24.77	+0.83%	11	39,109	0.5%	355.7	5.6%	30.9x	2.6x	BRACBANK	57,596	1.3%	0.6	7.7x	0.9x
Textile	1,657	1,655	+1.49	+0.09%	58	171,592	2.2%	116.1	1.8%	NM	1.2x	BEACONPHAR	56,595	1.2%	0.4	86.9x	9.0x
Paper & Printing	10,577	10,428	+149.25	+1.43%	6	40,754	0.5%	288.7	4.6%	61.6x	2.0x	ISLAMIBANK	52,486	1.1%	0.0	8.5x	0.7x
Tannery	3,135	3,139	-3.95	-0.13%	6	35,496	0.5%	35.4	0.6%	58.4x	3.3x	DUTCHBANGL	44,203	1.0%	1.6	8.0x	1.0x
Jute	16,822	17,122	-299.89	-1.75%	3	3,917	0.0%	25.3	0.4%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	688	688	+0.06	+0.01%	5	31,816	0.4%	56.3	0.9%	53.0x	1.9x	UNILEVERCL	39,994	0.9%	13.2	40.4x	19.3x
Miscellaneous	4,434	4,398	+36.61	+0.83%	14	241,959	3.1%	385.9	6.1%	27.7x	1.9x	POWERGRID	37,347	0.8%	351.0	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	+0.02	+0.03%	242	3,269,722	41.6%	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
UNIONCAP	12.4	+9.7%	119.4	NM	NM	SQURPHARMA	121,499	7.0%	9.6x	1.5x	ORIONINFU	441.5	+8.7%	396.1	NM	29.6x
SANDHANINS	33.3	+9.5%	208.1	NM	NM	BATBC	74,086	4.3%	15.4x	5.7x	POWERGRID	52.4	-	351.0	NM	0.3x
ILFSL	6.9	+9.5%	31.6	NM	NM	BEXIMCO	69,196	4.0%	34.2x	1.2x	DESHBANDHU	43.8	+8.1%	255.8	73.0x	2.3x
ORIONINFU	441.5	+8.7%	396.1	NM	29.6x	RENATA	68,042	3.9%	66.1x	4.4x	BSC	118.4	+4.0%	222.3	7.3x	1.4x
DESHBANDHU	43.8	+8.1%	255.8	73.0x	2.3x	BXPHARMA	45,564	2.6%	13.8x	1.4x	SEAPEARL	118.8	-0.2%	214.5	19.3x	6.5x
NAVANAPHAR	97.0	+7.2%	111.4	25.6x	2.3x	BEACONPHAR	39,617	2.3%	86.9x	9.0x	SANDHANINS	33.3	+9.5%	208.1	NM	NM
RUPALIBANK	38.7	+6.6%	148.7	28.8x	1x	GP	38,700	2.2%	12.5x	6.4x	KARNAPHULI	43.8	+3.8%	190.8	25.9x	2.1x
KBPPWBIL	137.8	+6.0%	76.8	NM	11.6x	BRACBANK	30,964	1.8%	7.7x	0.9x	BPML	74.2	+4.5%	190.0	31.6x	0.9x
PREMIERLEA	7.2	+5.9%	5.8	NM	NM	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	MEGHNALIFE	91.5	+2.3%	173.7	NM	NM
MIDASFIN	13.1	+5.6%	18.9	NM	1.7x	LHBL	28,562	1.6%	13.0x	3.9x	RUPALIBANK	38.7	+6.6%	148.7	28.8x	1.0x

Top Ten Losers	Close Price	Δ%	Turnover	PE	PB	NBL	19,116	1.1%	NM	0.9x	Block Trade	Maximum Price	Minimum	No. of	Quantity	Turnover	
	(BDT)		(BDT Mn)			CITYBANK	18,190	1.0%	5.2x	0.7x		(BDT)	Price (BDT)	Trade	('000)	(BDT Mn)	
	1STPRIMFMF	34.6	-8.5%	69.5	NM	3.3x	OLYMPIC	16,066	0.9%	19.0x	3.0x	BEACONPHAR	245.0	223.6	8.0	306	74.21
	IFILISLMF1	6.5	-4.4%	17.7	NM	1x	ROBI	15,714	0.9%	52.6x	2.4x	BSC	112.0	112.0	3.0	408	45.66
	DBH1STMF	6.9	-4.2%	25.8	NM	0.8x	ALARABANK	14,357	0.8%	12.7x	1.1x	SEAPEARL	130.5	107.5	9.0	369	42.16
	CAPMIBBLMF	13.0	-3.7%	15.4	NM	1.4x	BSRMLTD	14,210	0.8%	5.2x	0.6x	GP	262.7	261.6	9.0	110	28.73
	ARAMITCEM	26.5	-3.6%	14.7	NM	NM	SEAPEARL	13,733	0.8%	19.3x	6.5x	BEXIMCO	105.0	104.1	12.0	211	22.08
	GLDNJMF	13.6	-3.5%	42.4	NM	1.4x	UPGDCL	13,547	0.8%	19.6x	4.1x	KBPWPBIL	132.0	128.5	5.0	129	16.84
	RSRMSTEEL	23.4	-2.9%	7.0	NM	0.5x	PRIMEBANK	13,491	0.8%	5.3x	0.7x	FINEFOODS	130.1	130.1	1.0	80	10.40
MONNOAGML	545.6	-2.8%	25.3	NM	4.1x						ACMEPL	31.9	31.9	11.0	293	9.35	
NCCBLMF1	7.3	-2.7%	3.5	NM	0.8x						BEACHHATCH	47.0	46.0	2.0	200	9.30	
LIBRAINFU	824.4	-2.6%	7.6	NM	1.0x						NBL	9.0	9.0	1.0	1,000	9.00	

* 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 (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BEACONPHAR	245.0	223.6	74.2	306	8
BSC	112.0	112.0	45.7	408	3
SEAPEARL	130.5	107.5	42.2	369	9
GP	262.7	261.6	28.7	110	9
BEXIMCO	105.0	104.1	22.1	211	12
KBPPWBIL	132.0	128.5	16.8	129	5
FINEFOODS	130.1	130.1	10.4	80	1
ACMEPL	31.9	31.9	9.3	293	11
BEACHHATCH	47.0	46.0	9.3	200	2
NBL	9.0	9.0	9.0	1,000	1
MONOSPOOL	256.1	256.1	8.7	34	1
EGEN	40.7	40.7	8.1	200	1
MEGHNALIFE	98.0	98.0	6.9	71	1
BRACBANK	35.2	35.0	6.7	191	4
ACMELAB	78.1	77.0	6.3	82	11
SONALIANSH	606.0	606.0	6.0	10	3
DESHBANDHU	40.4	38.0	6.0	151	6
SONALIPAPR	569.0	569.0	4.6	8	2
MALEKSPIN	24.4	24.4	4.2	172	5
IFIC	11.1	10.1	4.1	387	5
BARKAPOWER	19.2	19.2	3.8	200	1
LHBL	78.6	78.6	3.8	48	1
Total			419.3		190

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

Important DSE News

CROWNCEMNT

The company has informed that the Board of Directors of the company has taken, among others, the following decision: "The Commercial Production of the 6th Unit of Crown Cement PLC. with a Production Capacity of 8,280 Metric Ton per day installed at its Factory Premises West Mukterpur, Munshiganj will commence in the month of January 2024 instead of its previous probable schedule of February 2023 due to delay caused by Russia-Ukraine War in supply of Machineries by the Suppliers."

EXCH

Information regarding the subscription limit for the IPO application amount of Best Holdings Limited: This is for information to all the respective stakeholders that with regard to the subscription limit for the IPO application amount of Best Holdings Limited, BSEC has brought an amendment in the consent letter; which is as follows: "The subscribed limit for the application amount is at TK. 10,000/- or its multiples but not exceeding Tk. 15,00,000/- (Taka fifteen lac)." Please be informed that all other clauses and conditions of the consent letter remains same. Please visit the following website for subscription related updates: <https://www.essbangladesh.com>.

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