

Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.23%) gained 14.59 points and closed at 6,346.21. The blue-chip index DS30 (+0.43%), the Shariah-based index DSES (+0.57%), and the large-cap index CDSET (+0.51%) closed at 2,138.83, 1,390.40, and 1,217.31 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.75%, followed by Fuel & Power (+0.11%), Engineering (+0.06%), Telecommunication (+0.00%), Food & Allied (-0.01%), Bank (-0.03%), and NBFi (-0.11%), respectively. Block trades contributed 8.5% of the overall market turnover. Beacon Pharmaceuticals Limited (+8.7%) was the most traded share with a turnover of BDT 464 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,346.21	6,331.61	+14.59	+0.23%	+1.6%
DS30	2,138.83	2,129.77	+9.06	+0.43%	+2.1%
DSES	1,390.40	1,382.54	+7.86	+0.57%	+1.9%
CDSET	1,217.31	1,211.14	+6.17	+0.51%	+1.2%

	Advanced	Declined	Unchanged	Total
All Category	71	96	186	353
A Category (Equity)	34	71	114	219
B Category (Equity)	32	23	59	114
N Category (Equity)	0	0	0	0
Z Category (Equity)	5	2	13	20
Mutual Funds	1	6	29	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	7,884,493	7,880,078	+0.1%
	Mn USD	71,677	71,637	
Turnover	Mn BDT	7,601	8,008	-5.1%
	Mn USD	69	73	
Volume	Mn Shares	167	196	-15.0%
No. of Trade		174,699	193,657	-9.8%

* Average Interbank Exchange Rate is BDT 110.00 as of Jan 17, 2024

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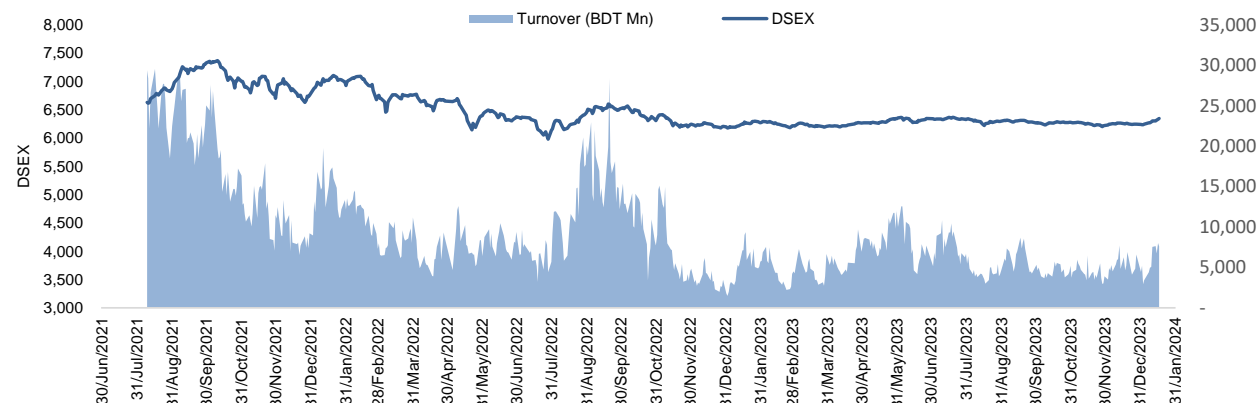


Figure: Sectorial Turnover (BDT Mn)

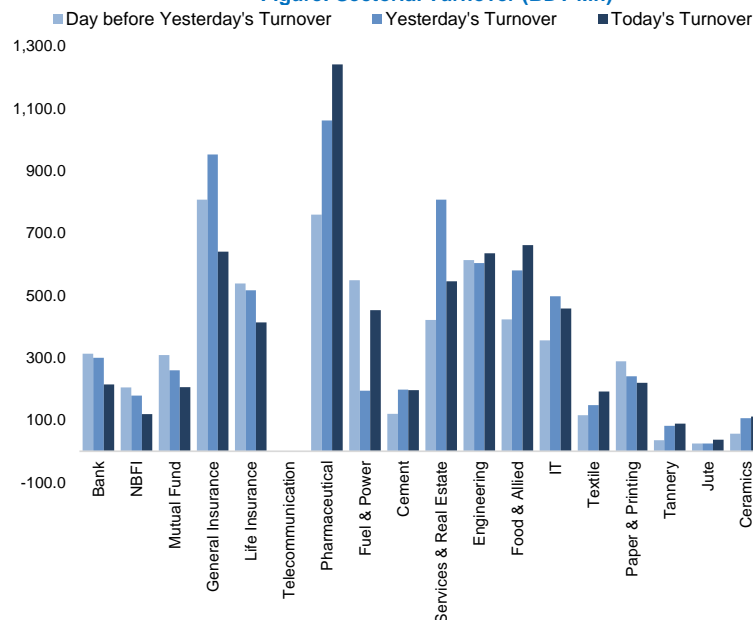
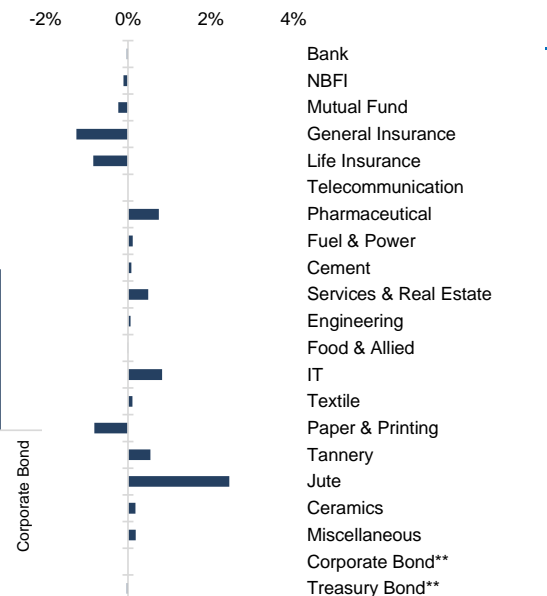


Figure: Sectorial Mcap Change



Market PE 19.7x

Market PB 1.7x

* 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	1,472	-0.41	-0.03%	35	694,230	8.8%	214.0	3.1%	12.7x	0.7x	GP	386,996	8.4%	0.5	12.5x	6.4x
NBFI	1,913	1,915	-2.09	-0.11%	23	186,133	2.4%	119.1	1.7%	NM	NM	WALTONHIL	317,378	6.9%	0.0	30.8x	4.2x
Mutual Fund	859	861	-2.01	-0.23%	37	40,641	0.5%	205.5	3.0%	NM	0.8x	BATBC	280,098	6.1%	0.7	15.4x	5.7x
General Insurance	3,634	3,680	-46.03	-1.25%	42	106,183	1.3%	640.5	9.2%	19.7x	1.7x	SQURPHARMA	188,105	4.1%	63.5	9.7x	1.6x
Life Insurance	2,687	2,710	-22.83	-0.84%	15	75,098	1.0%	413.9	6.0%	NM	NM	ROBI	157,138	3.4%	0.1	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.4%	0.6	0.0%	16.0x	4.1x	RENATA	139,689	3.0%	0.0	66.1x	4.4x
Pharmaceutical	3,808	3,780	+28.19	+0.75%	33	736,137	9.4%	1,241.4	17.9%	20.0x	2.3x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,697	1,695	+1.94	+0.11%	23	447,674	5.7%	453.0	6.5%	44.8x	1.1x	BEXIMCO	103,571	2.3%	0.0	34.2x	1.2x
Cement	2,617	2,615	+2.08	+0.08%	7	125,802	1.6%	196.4	2.8%	17.8x	2.7x	BERGERPBL	87,228	1.9%	1.7	28.3x	6.9x
Services & Real Estate	1,670	1,662	+8.13	+0.49%	8	65,989	0.8%	545.7	7.8%	21.7x	0.9x	LHBL	83,503	1.8%	118.4	13.1x	3.9x
Engineering	4,522	4,520	+2.70	+0.06%	42	531,139	6.8%	635.8	9.1%	27.1x	1.9x	ICB	72,342	1.6%	0.0	NM	1.7x
Food & Allied	21,331	21,332	-1.27	-0.01%	21	394,698	5.0%	661.3	9.5%	19.8x	6.9x	BXPBARMA	65,222	1.4%	0.3	13.8x	1.4x
IT	3,047	3,022	+25.05	+0.83%	11	39,730	0.5%	458.2	6.6%	31.4x	2.6x	BEACONPHAR	61,538	1.3%	464.1	94.5x	9.8x
Textile	1,658	1,657	+1.84	+0.11%	58	171,738	2.2%	191.5	2.8%	NM	1.2x	BRACBANK	57,596	1.3%	0.7	7.7x	0.9x
Paper & Printing	10,474	10,560	-86.12	-0.82%	6	40,355	0.5%	220.1	3.2%	61.0x	2.0x	ISLAMIBANK	52,486	1.1%	0.0	8.5x	0.7x
Tannery	3,180	3,163	+17.21	+0.54%	6	36,002	0.5%	88.8	1.3%	59.3x	3.3x	DUTCHBANGL	44,203	1.0%	0.3	8.0x	1.0x
Jute	17,423	17,006	+417.57	+2.46%	3	4,057	0.1%	37.1	0.5%	NM	NM	TITASGAS	40,459	0.9%	0.0	NM	0.6x
Ceramics	693	691	+1.25	+0.18%	5	32,031	0.4%	111.4	1.6%	53.4x	1.9x	UNILEVERCL	39,852	0.9%	6.9	40.3x	19.2x
Miscellaneous	4,485	4,476	+8.47	+0.19%	14	244,717	3.1%	516.3	7.4%	28.0x	1.9x	POWERGRID	37,917	0.8%	287.7	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%	0.1	12.1x	0.9x
Treasury Bond**	86	86	-0.03	-0.03%	242	3,268,447	41.5%	2.7	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
INTECH	28.2	+9.7%	48.1	NM	NM	SQURPHARMA	121,499	7.0%	9.7x	1.6x	BEACONPHAR	266.4	+8.7%	464.1	94.5x	9.8x
BEACONPHAR	266.4	+8.7%	464.1	94.5x	9.8x	BATBC	74,086	4.3%	15.4x	5.7x	ORIONINFU	436.3	-2.5%	297.2	NM	29.2x
SHYAMPSUG	224.4	+8.7%	46.3	NM	NM	BEXIMCO	69,196	4.0%	34.2x	1.2x	POWERGRID	53.2	+1.5%	287.7	NM	0.3x
LIBRAINFU	894.4	+7.5%	19.0	NM	1.1x	RENATA	68,042	3.9%	66.1x	4.4x	BEACHHATCH	58.2	+5.4%	280.8	54.9x	5.3x
BDTHAI	27.2	+6.7%	158.0	NM	1.0x	BXPBARMA	45,564	2.6%	13.8x	1.4x	SEAPPEARL	122.9	+4.2%	247.9	20.0x	6.7x
GQBALLPEN	135.6	+6.3%	39.8	NM	1.1x	BEACONPHAR	39,617	2.3%	94.5x	9.8x	BSC	124.0	-	198.6	7.7x	1.4x
ADNTEL	123.7	+5.8%	31.4	NM	4x	GP	38,700	2.2%	12.5x	6.4x	SANDHANINS	34.0	-3.1%	163.0	NM	NM
BEACHHATCH	58.2	+5.4%	280.8	54.9x	5.3x	BRACBANK	30,964	1.8%	7.7x	0.9x	BDTHAI	27.2	+6.7%	158.0	NM	1.0x
AFTABAUTO	28.9	+4.7%	47.2	NM	0.6x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	NAVANAPHAR	97.6	+0.2%	147.4	25.8x	2.3x
AIL	81.8	+4.3%	75.5	42.2x	3.4x	LHBL	28,562	1.6%	13.1x	3.9x	MEGHNALIFE	87.0	-3.2%	130.7	NM	NM

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)
CONFIDCEM	84.8	-4.7%	0.9	21.3x	1.2x	NBL	19,116	1.1%	NM	0.9x	SEAPPEARL	129.5	109.0	20.0	2,117	234.31
UNIONCAP	11.8	-4.1%	76.6	NM	NM	CITYBANK	18,190	1.0%	5.2x	0.7x	DBH	52.0	51.1	8.0	1,196	61.22
CRYSTALINS	96.1	-3.4%	15.1	31.4x	3.8x	OLYMPIC	16,066	0.9%	18.8x	2.9x	ORIONPHARM	79.6	71.7	76.0	674	50.68
MEGHNALIFE	87.0	-3.2%	130.7	NM	NM	ROBI	15,714	0.9%	52.6x	2.4x	BEACHHATCH	60.7	51.0	10.0	706	41.53
MIDASFIN	12.1	-3.2%	5.8	NM	1.6x	ALARABANK	14,357	0.8%	12.6x	1.1x	ACMELAB	81.5	77.7	32.0	245	19.51
PARAMOUNT	58.3	-3.2%	15.0	47.8x	2.2x	BSRMLTD	14,210	0.8%	5.2x	0.6x	ACMEPL	35.4	31.9	9.0	548	17.70
SANDHANINS	34.0	-3.1%	163.0	NM	NM	SEAPPEARL	13,733	0.8%	20.0x	6.7x	BXPBARMA	135.0	131.6	22.0	130	17.27
SONALILIFE	76.8	-2.9%	16.3	NM	NM	UPGDCL	13,547	0.8%	19.6x	4.1x	KARNAPHULI	45.0	42.0	2.0	350	15.15
ILFSL	6.8	-2.9%	19.6	NM	NM	PRIMEBANK	13,491	0.8%	5.3x	0.7x	NAVANAPHAR	106.9	92.7	2.0	145	13.80
NITOLINS	37.6	-2.8%	2.9	19.2x	1.2x						EGEN	45.1	40.7	9.0	325	13.67

* 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
SEAPEARL	129.5	109.0	234.3	2,117	20
DBH	52.0	51.1	61.2	1,196	8
ORIONPHARM	79.6	71.7	50.7	674	76
BEACHHATCH	60.7	51.0	41.5	706	10
ACMELAB	81.5	77.7	19.5	245	32
ACMEPL	35.4	31.9	17.7	548	9
BXPHARMA	135.0	131.6	17.3	130	22
KARNAPHULI	45.0	42.0	15.2	350	2
NAVANAPHAR	106.9	92.7	13.8	145	2
EGEN	45.1	40.7	13.7	325	9
BBSCABLES	45.0	45.0	9.9	220	3
EBL	29.9	29.9	9.4	316	1
NBL	9.0	9.0	9.0	1,000	1
HRTEX	118.0	104.5	8.3	73	3
BRACBANK	35.2	34.3	5.8	164	9
BSC	127.0	115.0	5.2	45	4
EMERALDOIL	86.0	86.0	4.7	55	1
GP	261.6	261.6	4.7	18	6
BEXIMCO	105.8	104.1	4.6	44	3
SOUTHEASTB	12.5	12.0	4.1	331	4
CITYBANK	20.4	20.4	3.9	190	2
BSRMLTD	81.2	81.0	3.7	46	7
Total			647.5		319

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

Important DSE News

ITC

The Company will be placed in 'A' category from existing 'B' category with effect from January 18, 2024 as the Company has reported disbursement of 10% Cash Dividend for the year ended June 30, 2023.

EXCH

This is for information of all concerned that the name of 'Dhaka Stock Exchange Limited' has been changed into 'Dhaka Stock Exchange PLC.'. The short name of 'Dhaka Stock Exchange PLC.' will remain as 'DSE'.

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