

Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.52%) lost 96.5 points and closed at 6,240.25. The blue-chip index DS30 (+0.35%), the Shariah-based index DSES (-1.02%), and the large-cap index CDSET (-0.85%) closed at 2,137.19, 1,374.17, and 1,203.84 points, respectively. All the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 7.56% followed by Engineering (-5.38%), Bank (-3.31%), Fuel & Power (-2.30%), Pharmaceutical (-1.32%), Food & Allied (-0.45%), and Telecommunication (0.00%), respectively. Block trades contributed 5.2% of the overall market turnover. Bd.Thai Aluminium Ltd. (+9.8%) was the most traded share with a turnover of BDT 246 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,240.25	6,336.76	-96.50	-1.52%	-0.1%
DS30	2,137.19	2,129.71	+7.48	+0.35%	+2.1%
DSES	1,374.17	1,388.29	-14.12	-1.02%	+0.7%
CDSET	1,203.84	1,214.14	-10.30	-0.85%	+0.1%

	Advanced	Declined	Unchanged	Total
All Category	54	296	36	386
A Category (Equity)	39	164	33	236
B Category (Equity)	14	109	3	126
N Category (Equity)	0	0	0	0
Z Category (Equity)	1	23	0	24
Mutual Funds	2	34	1	37
Corporate Bonds	1	1	1	3
Treasury Bonds	1	2	0	3

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,769,138	7,879,048	-1.4%
	Mn USD	70,629	71,628	-1.4%
Turnover	Mn BDT	5,889	6,371	-7.6%
	Mn USD	54	58	-7.6%
Volume	Mn Shares	163	142	+14.7%
No. of Trade		158,923	162,574	-2.2%

* Average Interbank Exchange Rate is BDT 110.00 as of Jan 21, 2024

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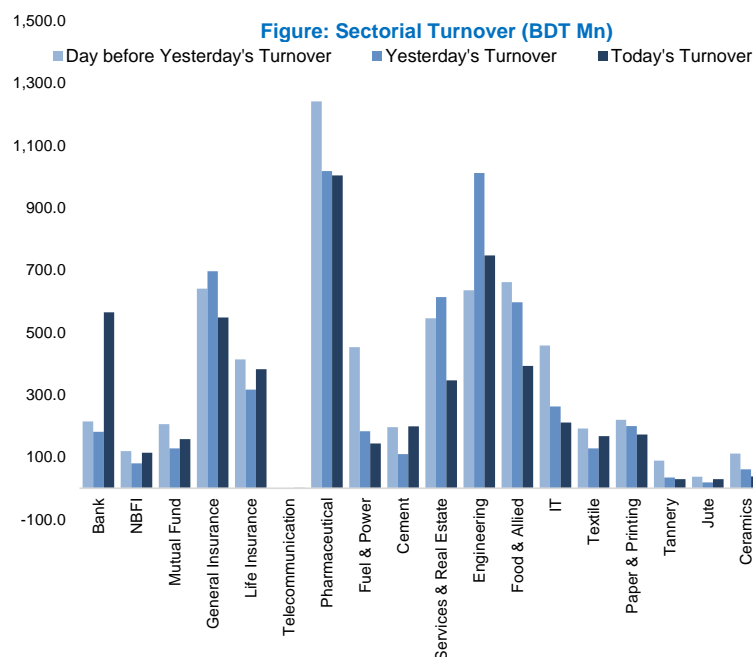
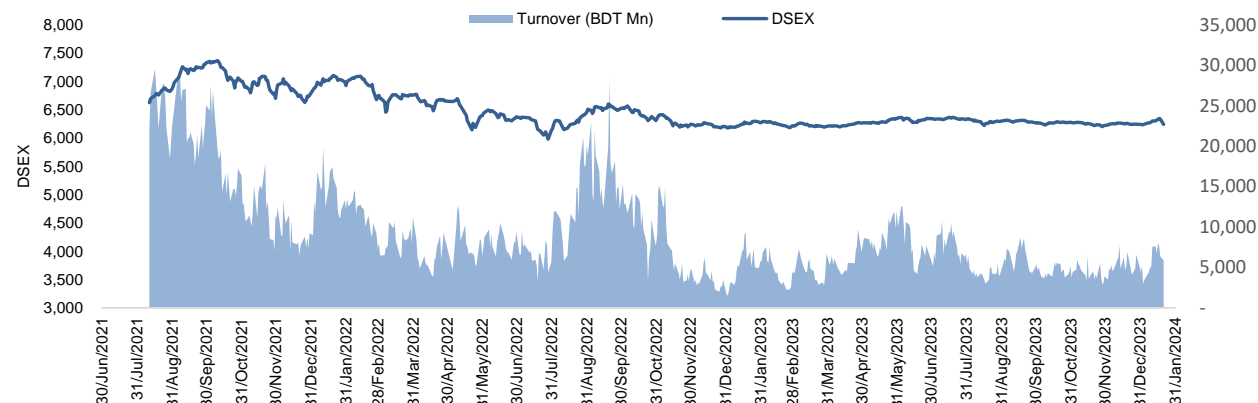
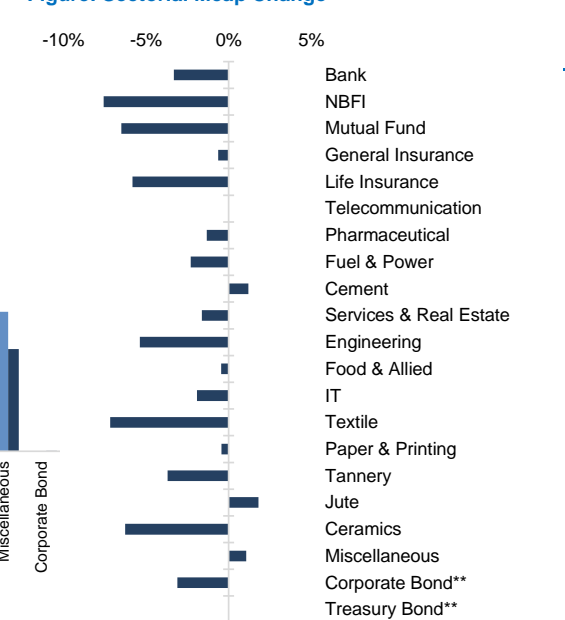


Figure: Sectorial Mcap Change



Market PE 19.2x

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	1,421	1,469	-48.61	-3.31%	35	670,121	8.6%	565.0	10.1%	12.2x	0.7x	GP	386,996	8.7%	1.1	12.5x	6.4x
NBFI	1,767	1,912	-144.60	-7.56%	23	173,616	2.2%	113.8	2.0%	NM	NM	WALTONHIL	297,567	6.7%	0.4	28.9x	3.9x
Mutual Fund	802	858	-55.65	-6.49%	37	37,933	0.5%	157.5	2.8%	NM	0.7x	BATBC	280,098	6.3%	0.4	15.4x	5.7x
General Insurance	3,617	3,641	-23.08	-0.63%	42	105,702	1.4%	548.0	9.8%	19.6x	1.7x	SQURPHARMA	189,523	4.2%	67.5	9.7x	1.6x
Life Insurance	2,525	2,681	-155.79	-5.81%	15	70,585	0.9%	381.9	6.8%	NM	NM	ROBI	157,138	3.5%	0.0	52.6x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.5%	1.1	0.0%	16.0x	4.1x	RENATA	139,689	3.1%	0.0	66.1x	4.4x
Pharmaceutical	3,755	3,806	-50.20	-1.32%	33	725,893	9.4%	1,003.7	18.0%	19.8x	2.2x	UPGDCL	135,475	3.0%	0.0	19.6x	4.1x
Fuel & Power	1,655	1,694	-38.95	-2.30%	23	436,829	5.6%	143.8	2.6%	43.7x	1.0x	BEXIMCO	103,842	2.3%	0.0	34.3x	1.2x
Cement	2,632	2,602	+30.96	+1.19%	7	127,020	1.6%	198.6	3.6%	17.9x	2.7x	BERGERPBL	88,150	2.0%	18.2	28.6x	7.0x
Services & Real Estate	1,602	1,628	-26.41	-1.62%	8	63,276	0.8%	346.7	6.2%	20.8x	0.8x	LHBL	85,245	1.9%	155.2	13.4x	4.0x
Engineering	4,285	4,528	-243.43	-5.38%	42	504,263	6.5%	747.1	13.4%	25.7x	1.8x	ICB	66,779	1.5%	0.7	NM	1.6x
Food & Allied	21,227	21,324	-96.44	-0.45%	21	395,427	5.1%	392.3	7.0%	19.9x	6.9x	BXPBARMA	61,296	1.4%	133.5	13.0x	1.4x
IT	2,995	3,054	-58.60	-1.92%	11	39,047	0.5%	210.8	3.8%	30.9x	2.6x	BEACONPHAR	59,783	1.3%	146.2	91.8x	9.5x
Textile	1,539	1,658	-118.95	-7.17%	58	159,416	2.1%	167.4	3.0%	NM	1.1x	BRACBANK	58,401	1.3%	173.7	7.8x	0.9x
Paper & Printing	10,432	10,477	-45.18	-0.43%	6	40,194	0.5%	172.5	3.1%	60.7x	2.0x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	3,040	3,157	-116.69	-3.70%	6	34,422	0.4%	29.0	0.5%	56.7x	3.2x	DUTCHBANGL	43,604	1.0%	7.6	7.9x	1.0x
Jute	17,712	17,399	+312.99	+1.80%	3	4,124	0.1%	29.1	0.5%	NM	NM	UNILEVERCL	39,674	0.9%	1.1	40.1x	19.2x
Ceramics	646	689	-43.20	-6.27%	5	29,890	0.4%	38.4	0.7%	49.8x	1.8x	TITASGAS	36,502	0.8%	0.4	NM	0.5x
Miscellaneous	4,504	4,457	+47.18	+1.06%	14	246,055	3.2%	328.0	5.9%	28.2x	2.0x	POWERGRID	36,349	0.8%	32.7	NM	0.3x
Corporate Bond**	4,384	4,525	-140.47	-3.10%	13	43,965	0.6%	1.5	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.1	12.1x	0.9x
Treasury Bond**	86	86	+0.01	+0.01%	241	3,269,769	42.1%	8.4	0.2%	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
KBPPWBIL	160.2	+9.8%	68.4	NM	13.5x	SQURPHARMA	121,499	7.0%	9.7x	1.6x	BDTHAI	32.6	+9.8%	245.9	NM	1.2x
BDTHAI	32.6	+9.8%	245.9	NM	1.2x	BATBC	74,086	4.3%	15.4x	5.7x	ORIONINFU	474.4	+1.0%	187.6	NM	31.8x
KOHINOOR	507.9	+6.0%	106.1	49.6x	16.8x	BEXIMCO	69,196	4.0%	34.3x	1.2x	DESHBANDHU	48.8	+5.4%	180.6	81.3x	2.5x
KAY&QUE	275.6	+5.7%	39.1	NM	3.6x	RENATA	68,042	3.9%	66.1x	4.4x	SEAPPEARL	117.0	+2.1%	175.8	19.0x	6.4x
RUPALILIFE	131.1	+5.5%	76.1	NM	NM	BXPBARMA	45,564	2.6%	13.0x	1.4x	BRACBANK	36.3	+1.4%	173.7	7.8x	0.9x
DESHBANDHU	48.8	+5.4%	180.6	81.3x	2.5x	BEACONPHAR	39,617	2.3%	91.8x	9.5x	BSC	122.2	+2.1%	160.1	7.6x	1.4x
KPPL	27.3	+4.6%	89.7	NM	NM	GP	38,700	2.2%	12.5x	6.4x	LHBL	73.4	+2.7%	155.2	13.4x	4.0x
DGIC	36.2	+4.0%	42.8	37.7x	3.0x	BRACBANK	30,964	1.8%	7.8x	0.9x	BEACONPHAR	258.8	-1.1%	146.2	91.8x	9.5x
SONALIANS	596.1	+3.8%	27.9	79.0x	4.9x	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	KARNAPHULI	45.6	+2.2%	144.6	27.0x	2.2x
PRIMEBANK	22.3	+3.7%	5.4	5.4x	0.7x	LHBL	28,562	1.6%	13.4x	4.0x	BXPBARMA	137.4	-6.0%	133.5	13.0x	1.4x

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)
ZAHINTEX	8.1	-10.0%	1.0	NM	0.8x	NBL	19,116	1.1%	NM	0.8x	DBH	56.3	56.3	1.0	1,000	56.30
NURANI	6.3	-10.0%	0.1	NM	1x	CITYBANK	18,190	1.0%	5.1x	0.7x	BEXIMCO	104.1	104.1	3.0	356	37.07
PTL	69.3	-10.0%	0.2	9.6x	1.8x	OLYMPIC	16,066	0.9%	18.7x	2.9x	DESHBANDHU	47.8	44.0	8.0	610	28.57
DSSL	15.3	-10.0%	0.4	32.6x	0.8x	ROBI	15,714	0.9%	52.6x	2.4x	SEAPPEARL	103.5	103.3	4.0	266	27.48
FAREASTLIF	67.5	-10.0%	2.0	NM	NM	ALARABANK	14,357	0.8%	12.6x	1.1x	EGEN	40.7	40.7	6.0	518	21.08
LANKABAFIN	23.4	-10.0%	2.1	31.6x	1.3x	BSRMLTD	14,210	0.8%	5.2x	0.6x	IBP	18.9	18.9	2.0	622	11.75
SHEPHERD	21.6	-10.0%	0.0	NM	1.5x	SEAPPEARL	13,733	0.8%	19.0x	6.4x	NBL	9.0	9.0	1.0	1,100	9.90
NATLIFEINS	161.1	-10.0%	1.0	NM	NM	UPGDCL	13,547	0.8%	19.6x	4.1x	ORIONPHARM	72.7	71.7	16.0	135	9.72
NORTHERN	174.7	-10.0%	1.0	NM	2.1x	PRIMEBANK	13,491	0.8%	5.4x	0.7x	ORIONINFU	470.0	470.0	1.0	20	9.40
ECABLES	163.2	-10.0%	5.5	NM	0.5x						BEACONPHAR	284.0	284.0	1.0	31	8.67

* 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
DBH	56.3	56.3	56.3	1,000	1
BEXIMCO	104.1	104.1	37.1	356	3
DESHBANDHU	47.8	44.0	28.6	610	8
SEAPEARL	103.5	103.3	27.5	266	4
EGEN	40.7	40.7	21.1	518	6
IBP	18.9	18.9	11.7	622	2
NBL	9.0	9.0	9.9	1,100	1
ORIONPHARM	72.7	71.7	9.7	135	16
ORIONINFU	470.0	470.0	9.4	20	1
BEACONPHAR	284.0	284.0	8.7	31	1
SONALIPAPR	571.5	571.5	8.2	14	5
ISLAMICFIN	21.6	17.8	7.3	349	2
GP	261.6	261.6	6.6	25	9
SONALIANSH	570.0	554.0	5.7	10	6
BEACHHATCH	58.4	58.4	4.9	84	1
BBSCABLES	45.0	45.0	4.5	100	2
PDL	13.9	13.9	3.8	274	2
KPCL	26.6	26.6	3.8	143	1
KEYACOSMET	5.8	5.8	2.9	500	1
NCCBANK	14.4	14.4	2.9	200	2
FIRSTSBANK	8.1	8.1	2.7	330	1
KOHINOOR	465.5	455.1	2.3	5	2
Total			304.0		114

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

Important DSE News
SONALILIFE

The company has informed that the Board of Directors has elected Mr. Quazi Moniruzzaman, Independent Director as the Chairman of the company.

MONNOAGML

Monno Welfare Foundation, a Corporate Director of the Company, has expressed its intention to sell 132,000 shares out of its holding of 496,927 shares of the Company at prevailing market price (In the Public Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 working days.

GLOBALINS

The Company has further informed that 8,11,031 shares of Ar. Mubasshar Hussain, who was a Sponsor Director of the company, has been transmitted to his successors as per news disseminated by DSE on 14.01.2024.

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