

## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.35%) gained 21.95 points and closed at 6,276.26. The blue-chip index DS30 (+0.49%), the Shariah-based index DSES (+0.25%), and the large-cap index CDSET (+0.25%) closed at 2,158.20, 1,384.16, and 1,206.64 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 2.63%, followed by Pharmaceutical (+0.41%), Food & Allied (+0.21%), Telecommunication (-0.54%), NBFI (-4.73%), Fuel & Power (-5.01%), and Engineering (-5.25%), respectively. Block trades contributed 4.5% of the overall market turnover. Fortune Shoes Limited (-5.9%) was the most traded share with a turnover of BDT 625 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,276.26	6,254.31	+21.95	+0.35%	+0.5%
DS30	2,158.20	2,147.65	+10.55	+0.49%	+3.1%
DSES	1,384.16	1,380.76	+3.41	+0.25%	+1.5%
CDSET	1,206.64	1,203.60	+3.04	+0.25%	+0.3%

	Advanced	Declined	Unchanged	Total
All Category	126	227	40	393
A Category (Equity)	83	128	28	239
B Category (Equity)	32	86	11	129
N Category (Equity)	0	0	1	1
Z Category (Equity)	11	13	0	24
Mutual Funds	13	16	8	37
Corporate Bonds	1	2	1	4
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,690,059	7,732,798	-0.6%
	Mn USD	69,910	70,298	
Turnover	Mn BDT	11,769	10,422	+12.9%
	Mn USD	107	95	
Volume	Mn Shares	393	337	+16.5%
No. of Trade		295,870	267,859	+10.5%

\* Average Interbank Exchange Rate is BDT 110.00 as of Jan 23, 2024

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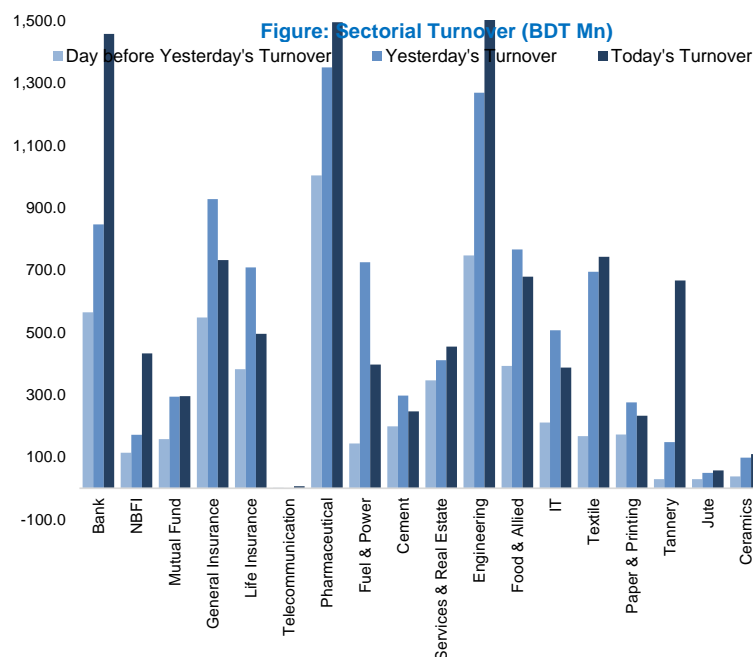
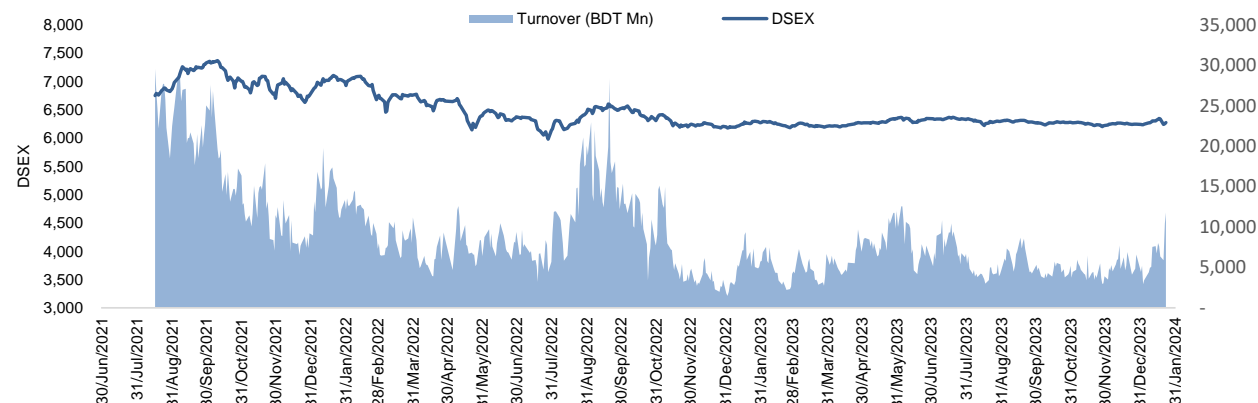
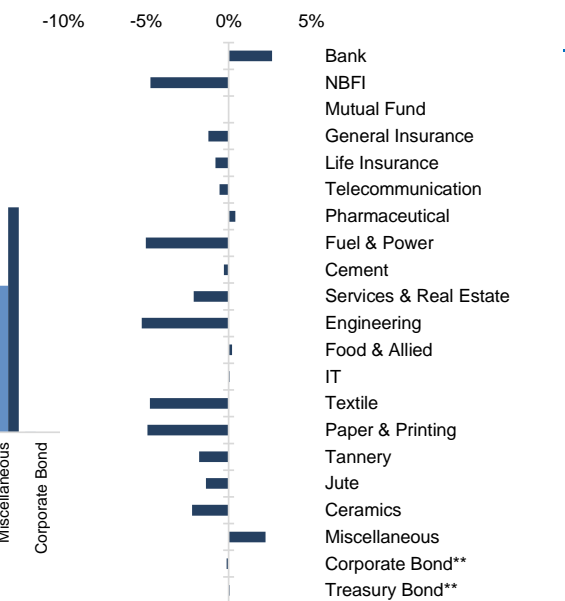


Figure: Sectorial Mcap Change



Market PE 18.9x

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	1,453	1,416	+37.18	+2.63%	35	685,542	8.9%	1,457.9	13.0%	12.5x	0.7x	GP	386,996	8.8%	0.9	12.5x	6.4x
NBFI	1,605	1,685	-79.65	-4.73%	23	157,734	2.1%	432.8	3.9%	NM	NM	BATBC	280,098	6.4%	1.2	15.4x	5.7x
Mutual Fund	815	815	+0.12	+0.02%	37	38,531	0.5%	295.8	2.6%	NM	0.7x	WALTONHIL	254,642	5.8%	5.4	23.0x	2.4x
General Insurance	3,626	3,671	-44.98	-1.23%	42	105,941	1.4%	732.1	6.5%	19.7x	1.7x	SQURPHARMA	196,349	4.5%	198.0	10.1x	1.6x
Life Insurance	2,489	2,508	-19.82	-0.79%	15	69,557	0.9%	495.7	4.4%	NM	NM	ROBI	157,138	3.6%	0.1	52.6x	2.4x
Telecommunication	4,919	4,946	-26.85	-0.54%	3	577,082	7.5%	6.2	0.1%	15.9x	4.1x	RENATA	139,689	3.2%	0.0	66.1x	4.4x
Pharmaceutical	3,768	3,753	+15.32	+0.41%	33	728,404	9.5%	1,495.6	13.3%	19.8x	2.2x	UPGDCL	123,649	2.8%	2.6	17.8x	3.8x
Fuel & Power	1,551	1,633	-81.89	-5.01%	23	409,387	5.3%	396.6	3.5%	40.9x	1.0x	BEXIMCO	103,842	2.4%	0.1	34.3x	1.2x
Cement	2,646	2,654	-7.77	-0.29%	7	127,682	1.7%	246.8	2.2%	18.0x	2.7x	BERGERPBL	92,533	2.1%	32.6	30.0x	7.4x
Services & Real Estate	1,556	1,589	-33.52	-2.11%	8	61,465	0.8%	454.8	4.0%	20.3x	0.8x	LHBL	86,406	2.0%	174.4	13.6x	4.0x
Engineering	3,836	4,049	-212.50	-5.25%	42	451,462	5.9%	1,623.9	14.5%	22.2x	1.4x	ICB	61,228	1.4%	4.2	NM	1.4x
Food & Allied	21,387	21,342	+44.67	+0.21%	21	398,394	5.2%	678.7	6.0%	20.0x	7.0x	BRACBANK	60,975	1.4%	294.8	8.2x	0.9x
IT	3,046	3,044	+2.06	+0.07%	11	39,716	0.5%	387.1	3.4%	31.4x	2.6x	BXPHERMA	59,779	1.4%	52.9	12.7x	1.3x
Textile	1,408	1,479	-70.51	-4.77%	58	145,852	1.9%	742.4	6.6%	NM	1.0x	BEACONPHAR	59,298	1.4%	116.8	91.0x	9.4x
Paper & Printing	10,081	10,601	-519.99	-4.91%	6	38,840	0.5%	232.5	2.1%	58.7x	1.9x	ISLAMIBANK	52,486	1.2%	0.0	8.5x	0.7x
Tannery	2,906	2,959	-52.90	-1.79%	6	32,900	0.4%	667.0	5.9%	54.2x	3.0x	DUTCHBANGL	44,427	1.0%	9.3	8.1x	1.0x
Jute	18,107	18,359	-252.39	-1.37%	3	4,216	0.1%	56.9	0.5%	NM	NM	UNILEVERCL	42,114	1.0%	7.9	42.6x	20.3x
Ceramics	618	632	-13.95	-2.21%	5	28,605	0.4%	109.6	1.0%	47.7x	1.7x	EPL	36,700	0.8%	14.2	6.5x	1.0x
Miscellaneous	4,651	4,550	+101.68	+2.23%	14	254,095	3.3%	721.9	6.4%	31.9x	2.0x	POWERGRID	34,211	0.8%	32.6	NM	0.3x
Corporate Bond**	4,351	4,356	-5.14	-0.12%	13	43,629	0.6%	0.4	0.0%	NM	NM	BSCCL	32,948	0.8%	5.3	13.6x	2.2x
Treasury Bond**	86	86	+0.06	+0.07%	241	3,279,828	42.7%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
INTECH	35.2	+10.0%	83.6	NM	NM
FUWANGFOOD	29.7	+10.0%	191.4	NM	11.4x
KBPPWBIL	193.8	+10.0%	132.5	NM	16.3x
MIRACLEIND	47.9	+9.6%	114.7	NM	2.9x
DULAMACOT	63.5	+9.5%	0.6	NM	NM
UNIONBANK	8.3	+9.2%	68.2	5.0x	0.5x
AL-HAJTEX	136.7	+9.2%	18.6	NM	15x
IFIC	10.8	+9.1%	104.3	6.5x	0.6x
AMANFEED	32.5	+8.7%	19.0	NM	1.1x
MITHUNKNIT	13.8	+8.7%	9.8	NM	4.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ESQUIRENIT	25.2	-10.0%	17.7	NM	0.4x
SHASHADNIM	24.3	-10.0%	0.8	21.9x	1x
KDSALTD	69.3	-10.0%	0.4	35.5x	2.6x
MATINSINN	56.7	-10.0%	12.1	43.6x	1.0x
SUMITPOWER	30.6	-10.0%	4.0	10.9x	0.8x
DOREENPWR	54.9	-10.0%	0.4	17.5x	1.1x
SPCERAMICS	38.7	-10.0%	1.9	NM	1.2x
PRIMEINSUR	60.5	-10.0%	1.1	29.5x	2.8x
MALEKSPIN	24.4	-10.0%	4.4	NM	0.5x
MAKSONSPIN	16.3	-9.9%	9.7	NM	1.1x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,499	7.0%	10.1x	1.6x
BATBC	74,086	4.3%	15.4x	5.7x
BEXIMCO	69,196	4.0%	34.3x	1.2x
RENATA	68,042	3.9%	66.1x	4.4x
BXPHERMA	45,564	2.6%	12.7x	1.3x
BEACONPHAR	39,617	2.3%	91.0x	9.4x
GP	38,700	2.2%	12.5x	6.4x
BRACBANK	30,964	1.8%	8.2x	0.9x
ISLAMIBANK	29,927	1.7%	8.5x	0.7x
LHBL	28,562	1.6%	13.6x	4.0x
PUBALIBANK	19,162	1.1%	4.4x	0.6x
NBL	19,116	1.1%	NM	0.8x
CITYBANK	18,190	1.0%	5.1x	0.7x
OLYMPIC	16,066	0.9%	18.8x	2.9x
ROBI	15,714	0.9%	52.6x	2.4x
ALARABANK	14,357	0.8%	12.6x	1.1x
BSRMLTD	14,210	0.8%	5.2x	0.6x
SEAPEARL	13,733	0.8%	17.8x	6.0x
UPGDCL	13,547	0.8%	17.8x	3.8x
PRIMEBANK	13,491	0.8%	5.5x	0.8x

\* 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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FORTUNE	57.8	-5.9%	625.3	NM	3.9x
BSC	123.8	+2.3%	338.2	11.2x	1.4x
ORIONINFU	491.3	+6.0%	311.7	NM	32.9x
DESHBANDHU	46.9	-1.3%	296.9	78.2x	2.4x
BRACBANK	37.9	+4.7%	294.8	8.2x	0.9x
BDTHAI	33.1	+1.5%	279.2	NM	1.2x
RUPALIBANK	40.2	+2.8%	234.3	29.9x	1.1x
SQURPHARMA	221.5	+2.0%	198.0	10.1x	1.6x
KARNAPHULI	47.7	+2.1%	197.6	28.2x	2.3x
FUWANGFOOL	29.7	+10.0%	191.4	NM	11.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BSRMLTD	90.0	86.5	4.0	1,220	109.69
ABBANK	8.7	7.8	4.0	9,700	78.06
ACMEPL	28.7	26.0	21.0	2,343	61.13
SEAPEARL	103.0	103.0	4.0	381	39.28
BEXIMCO	104.6	104.1	6.0	246	25.70
GP	262.0	261.6	23.0	98	25.58
BEACHHATCH	64.3	56.1	10.0	413	24.31
BRACBANK	37.9	37.0	3.0	580	21.69
HRTEX	123.0	116.0	4.0	172	20.79
BSC	122.0	122.0	2.0	150	18.30

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BSRMLTD	90.0	86.5	109.7	1,220	4
ABBANK	8.7	7.8	78.1	9,700	4
ACMEPL	28.7	26.0	61.1	2,343	21
SEAPEARL	103.0	103.0	39.3	381	4
BEXIMCO	104.6	104.1	25.7	246	6
GP	262.0	261.6	25.6	98	23
BEACHHATCH	64.3	56.1	24.3	413	10
BRACBANK	37.9	37.0	21.7	580	3
HRTEX	123.0	116.0	20.8	172	4
BSC	122.0	122.0	18.3	150	2
KBPPWBIL	180.0	176.0	17.4	97	12
ORIONPHARM	78.0	71.7	16.4	228	26
SINGERBD	153.0	153.0	15.3	100	1
RUPALILIFE	122.0	121.5	11.2	92	2
SONALIPAPR	629.9	569.0	10.5	18	2
BATBC	490.0	479.8	7.9	16	11
SONALIANS	607.0	606.0	5.7	9	2
KARNAPHULI	46.0	42.7	3.5	77	3
KPPL	30.0	30.0	2.5	85	1
MONOSPOOL	263.8	263.8	2.2	8	1
SIMTEX	22.6	20.0	2.1	95	2
EIL	42.0	41.0	1.9	46	2
<b>Total</b>			<b>534.6</b>		<b>165</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

#### Important DSE News

##### BSC

(Q2 Un-audited): EPS was Tk. 3.29 for October-December 2023 as against Tk. 4.43 for October-December 2022; EPS was Tk. 6.59 for July-December 2023 as against Tk. 8.41 for July-December 2022. NOCFPS was Tk. 15.84 for July-December 2023 as against Tk. 12.72 for July-December 2022. NAV per share was Tk. 90.79 as on December 31, 2023 and Tk. 86.67 as on June 30, 2023. EPS has been decreased due to decrease in net profit resulting from decrease in international shipping fare.

##### PENINSULA

(Q2 Un-audited): EPS was Tk. (0.01) for October-December 2023 as against Tk. 0.08 for October-December 2022; EPS was Tk. (0.11) for July-December 2023 as against Tk. (0.25) for July-December 2022. NOCFPS was Tk. (0.30) for July-December 2023 as against Tk. 0.19 for July-December 2022. NAV per share was Tk. 28.77 as on December 31, 2023 and Tk. 28.88 as on June 30, 2023. Reasons for deviation: During this period EPS has increased due to a significant increase in sales of 6.28% and Cost of sales also increased by 12.66%, and non-Operating profit increased by 107.28% compared with the previous period. As a result, EPS increased by 56%. NOCFPS has decreased due to an increase in cash payment to other sources 1,444.41% and cash paid to suppliers 23.73% and due to higher collection of revenue 1.54%. Selling and Distribution Expenses increased 68.58%. As a result, NOCFPS decreased significantly.

##### WALTONHIL

(Q2 Un-audited): EPS was Tk. 4.56 for October-December 2023 as against Tk. 2.00 for October-December 2022; EPS was Tk. 11.24 for July-December 2023 as against Tk. 0.47 for July-December 2022. NOCFPS was Tk. 27.16 for July-December 2023 as against Tk. 61.07 for July-December 2022. NAV per share was Tk. 345.75 (with revaluation) as on December 31, 2023 and Tk. 343.73 as on June 30, 2023. NAV per share was Tk. 244.26 (without revaluation) as on December 31, 2023 and Tk. 242.18 as on June 30, 2023.

##### CNW

Trading of shares of Sikder Insurance Company Limited will start at DSE from January 24, 2024 under 'N' category. DSE Trading Code for Sikder Insurance Company Limited is "SICL" and DSE Company Code is "25758" under 'Insurance' sector.

##### GENEXIL

Mr. Prince Mojumder, a Director of the company, has expressed his intention to transfer 4,00,000 shares of the company to his mother Ms. Momota Rani Ray (General Shareholder of the company), by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of DSE approval letter issued on December 26, 2023.

##### HRTEX

The Company will be placed in 'B' category from existing 'A' category with effect from January 24, 2024 as the Company has approved 5% Cash Dividend for the year ended June 30, 2023.

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