

Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.26%) lost 77.34 points and closed at 6,079.06. The blue-chip index DS30 (-1.11%), the Shariah-based index DSES (-1.12%), and the large-cap index CDSET (-0.73%) closed at 2,091.05, 1,337.14, and 1,171.86 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 4.94% followed by NBFi (-4.20%), Fuel & Power (-1.88%), Bank (-1.61%), Pharmaceutical (-0.89%), Food & Allied (-0.60%), and Telecommunication (-0.08%), respectively. Block trades contributed 3.7% of the overall market turnover. Orion Infusion Ltd. (+8.3%) was the most traded share with a turnover of BDT 325 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,079.06	6,156.41	-77.34	-1.26%	-2.7%
DS30	2,091.05	2,114.61	-23.56	-1.11%	-0.1%
DSES	1,337.14	1,352.29	-15.14	-1.12%	-2.0%
CDSET	1,171.86	1,180.52	-8.66	-0.73%	-2.6%

	Advanced	Declined	Unchanged	Total
All Category	57	311	26	394
A Category (Equity)	44	174	19	237
B Category (Equity)	10	116	4	130
N Category (Equity)	1	0	2	3
Z Category (Equity)	2	21	1	24
Mutual Funds	3	32	2	37
Corporate Bonds	0	1	5	6
Treasury Bonds	0	1	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,474,189	7,549,662	-1.0%
	Mn USD	67,947	68,633	
Turnover	Mn BDT	8,806	8,709	+1.1%
	Mn USD	80	79	
Volume	Mn Shares	268	279	-4.0%
No. of Trade		252,779	244,404	+3.4%

* Average Interbank Exchange Rate is BDT 110.00 as of Jan 28, 2024

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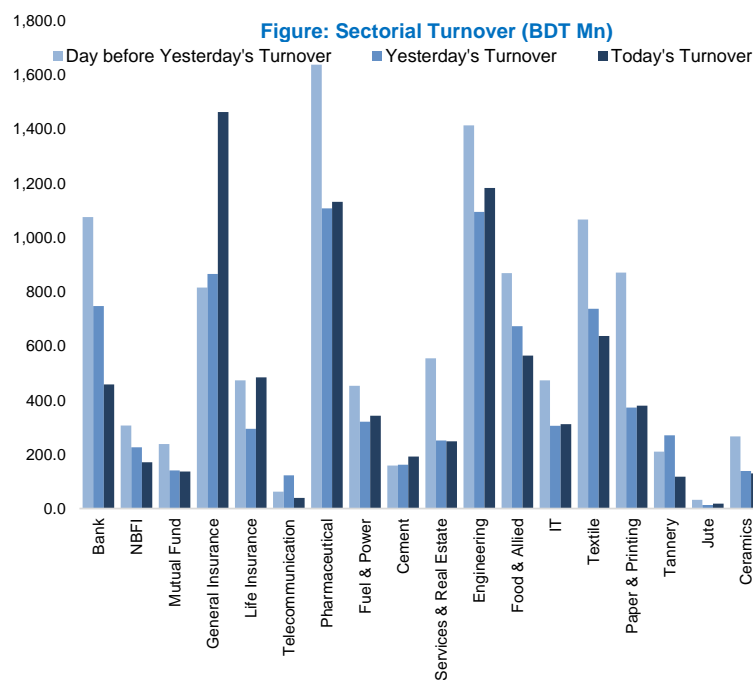
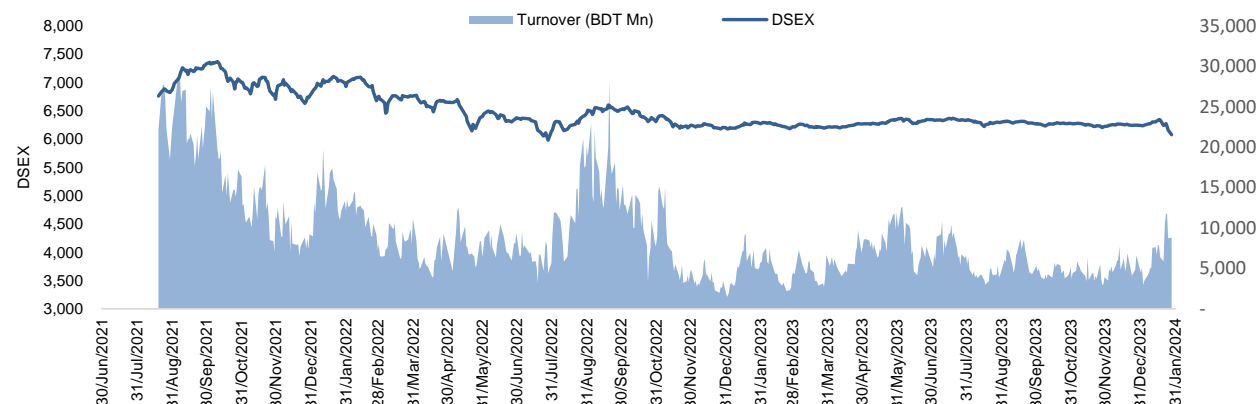
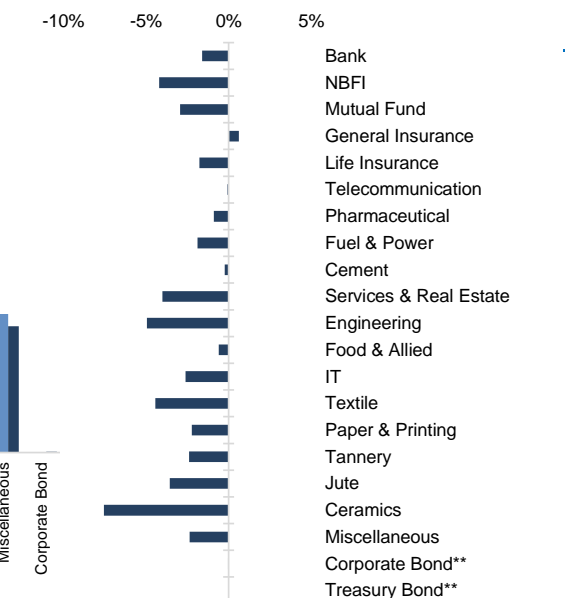


Figure: Sectorial Mcap Change



Market PE 17.9x

Market PB 1.5x

* 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	1,402	1,424	-22.92	-1.61%	35	661,132	8.9%	458.4	5.4%	12.0x	0.7x	GP	386,996	9.3%	0.0	12.5x	6.4x
NBFI	1,417	1,479	-62.06	-4.20%	23	139,216	1.9%	170.8	2.0%	NM	NM	BATBC	280,098	6.7%	0.5	15.4x	5.7x
Mutual Fund	751	773	-22.76	-2.94%	37	35,501	0.5%	136.2	1.6%	NM	0.7x	WALTONHIL	216,079	5.2%	10.7	19.5x	2.1x
General Insurance	3,623	3,600	+22.36	+0.62%	42	105,857	1.4%	1,463.7	17.3%	19.7x	1.7x	SQURPHARMA	190,764	4.6%	82.7	9.8x	1.6x
Life Insurance	2,305	2,346	-41.60	-1.77%	16	64,889	0.9%	484.0	5.7%	NM	NM	ROBI	157,138	3.8%	0.0	52.6x	2.4x
Telecommunication	4,868	4,871	-3.65	-0.08%	3	571,096	7.7%	39.4	0.5%	15.7x	4.1x	RENATA	139,689	3.4%	0.0	66.0x	4.4x
Pharmaceutical	3,636	3,669	-32.83	-0.89%	33	702,840	9.4%	1,131.9	13.3%	19.1x	2.2x	UPGDCL	104,751	2.5%	10.6	15.1x	3.2x
Fuel & Power	1,402	1,429	-26.89	-1.88%	23	369,889	5.0%	342.1	4.0%	38.5x	0.9x	BEXIMCO	103,842	2.5%	0.0	34.3x	1.2x
Cement	2,568	2,573	-5.86	-0.23%	7	123,885	1.7%	191.9	2.3%	16.9x	2.6x	BERGERPBL	88,503	2.1%	17.3	27.2x	6.6x
Services & Real Estate	1,454	1,515	-60.71	-4.01%	8	57,452	0.8%	247.9	2.9%	19.0x	0.7x	LHBL	83,387	2.0%	68.6	13.1x	3.9x
Engineering	3,399	3,576	-176.70	-4.94%	42	400,084	5.4%	1,183.5	14.0%	19.5x	1.3x	BXPHARMA	58,575	1.4%	101.1	12.4x	1.3x
Food & Allied	21,134	21,261	-126.96	-0.60%	21	393,695	5.3%	564.2	6.7%	20.0x	6.9x	BRACBANK	57,918	1.4%	37.5	7.7x	0.9x
IT	2,916	2,994	-77.79	-2.60%	11	38,022	0.5%	311.4	3.7%	30.1x	2.5x	ICB	57,326	1.4%	2.2	NM	1.3x
Textile	1,274	1,333	-59.19	-4.44%	58	131,957	1.8%	637.2	7.5%	NM	0.9x	ISLAMIBANK	52,486	1.3%	0.0	8.5x	0.7x
Paper & Printing	9,259	9,470	-210.92	-2.23%	6	35,673	0.5%	379.9	4.5%	53.9x	1.7x	BEACONPHAR	52,160	1.3%	50.4	80.1x	8.3x
Tannery	2,721	2,788	-66.89	-2.40%	6	30,810	0.4%	117.3	1.4%	50.7x	2.9x	DUTCHBANGL	42,557	1.0%	1.9	7.7x	1.0x
Jute	17,006	17,633	-627.23	-3.56%	3	3,960	0.1%	18.5	0.2%	NM	NM	UNILEVERCL	39,915	1.0%	6.8	40.4x	19.3x
Ceramics	544	584	-44.11	-7.55%	5	24,978	0.3%	129.8	1.5%	41.6x	1.5x	EBL	35,976	0.9%	0.9	6.4x	0.9x
Miscellaneous	4,554	4,665	-110.23	-2.36%	14	248,800	3.3%	466.0	5.5%	30.7x	2.0x	POWERGRID	32,073	0.8%	17.3	NM	0.3x
Corporate Bond**	4,315	4,316	-1.35	-0.03%	13	43,273	0.6%	2.7	0.0%	NM	NM	OLYMPIC	31,011	0.7%	31.4	18.8x	2.9x
Treasury Bond**	86	86	-0.01	-0.01%	241	3,279,793	43.9%	3.0	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
KPPL	34.3	+9.9%	238.0	NM	NM	SQURPHARMA	121,499	7.0%	9.8x	1.6x	ORIONINFU	523.6	+8.3%	325.2	NM	35.0x
SICL	13.3	+9.9%	0.0	NM	NM	BATBC	74,086	4.3%	15.4x	5.7x	BDTHAI	29.2	-9.9%	290.6	NM	1.1x
COPPERTECH	29.0	+9.8%	41.0	46.0x	2.2x	BEXIMCO	69,196	4.0%	34.3x	1.2x	KBPPWBIL	210.6	-3.5%	260.2	NM	17.7x
GBBPOWER	16.1	+9.5%	50.5	29.3x	0.8x	RENATA	68,042	3.9%	66.0x	4.4x	RUPALILIFE	133.0	+1.0%	245.5	NM	NM
ORIONINFU	523.6	+8.3%	325.2	NM	35.0x	BXPHARMA	45,564	2.6%	12.4x	1.3x	KPPL	34.3	+9.9%	238.0	NM	NM
CRYSTALINS	107.5	+8.0%	194.8	35.1x	4.3x	BEACONPHAR	39,617	2.3%	80.1x	8.3x	KARNAPHULI	54.3	+0.4%	228.5	32.1x	2.6x
SALVOCHEM	44.4	+6.2%	41.0	27.8x	3x	GP	38,700	2.2%	12.5x	6.4x	FUWANGFOOI	30.0	-5.7%	223.5	NM	11.5x
CONTININS	44.7	+5.7%	155.0	77.1x	2.0x	BRACBANK	30,964	1.8%	7.7x	0.9x	CRYSTALINS	107.5	+8.0%	194.8	35.1x	4.3x
ARAMITCEM	27.2	+5.4%	29.5	NM	NM	ISLAMIBANK	29,927	1.7%	8.5x	0.7x	CENTRALPHL	20.0	-7.4%	165.2	NM	3.6x
PREMIERCEM	57.2	+5.0%	71.3	NM	0.9x	LHBL	28,562	1.6%	13.1x	3.9x	CONTININS	44.7	+5.7%	155.0	77.1x	2.0x

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)
GSPFINANCE	16.2	-10.0%	4.3	NM	0.7x	NBL	19,116	1.1%	NM	0.8x	MONNOCERA	100.0	89.1	47.0	839	76.93
BDFINANCE	23.6	-9.9%	3.8	28.6x	1x	CITYBANK	18,190	1.0%	4.8x	0.7x	BEACONPHAR	230.0	230.0	2.0	178	40.94
BDTHAI	29.2	-9.9%	290.6	NM	1.1x	OLYMPIC	16,066	0.9%	18.8x	2.9x	KARNAPHULI	53.2	50.1	10.0	764	39.28
SPCERAMICS	30.2	-9.9%	54.6	94.4x	1.0x	ROBI	15,714	0.9%	52.6x	2.4x	SALVOCHEM	40.0	40.0	1.0	837	33.49
KDSALTD	54.0	-9.8%	26.0	27.7x	2.0x	ALARABANK	14,357	0.8%	12.5x	1.1x	BEACHHATCH	55.5	55.5	1.0	444	24.64
RINGSHINE	5.5	-9.8%	17.2	NM	NM	BSRMLTD	14,210	0.8%	5.2x	0.6x	CRYSTALINS	104.0	100.0	4.0	230	23.24
TAMIJTEX	129.6	-9.8%	3.2	19.5x	1.4x	SEAPEARL	13,733	0.8%	16.5x	5.5x	SQURPHARMA	219.0	219.0	2.0	80	17.52
HRTEX	76.4	-9.8%	13.5	NM	1.8x	UPGDCL	13,547	0.8%	15.1x	3.2x	SONALIPAPR	538.0	538.0	3.0	18	9.68
KTL	15.7	-9.8%	0.9	32.0x	0.9x	PRIMEBANK	13,491	0.8%	5.6x	0.8x	UNIONINS	59.1	59.1	1.0	100	5.91
IPDC	32.3	-9.5%	34.5	26.2x	1.8x						CVOPRL	176.0	176.0	1.0	29	5.10

* 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	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MONNOCERA	100.0	89.1	76.9	839	47
BEACONPHAR	230.0	230.0	40.9	178	2
KARNAPHULI	53.2	50.1	39.3	764	10
SALVOCHEM	40.0	40.0	33.5	837	1
BEACHHATCH	55.5	55.5	24.6	444	1
CRYSTALINS	104.0	100.0	23.2	230	4
SQURPHARMA	219.0	219.0	17.5	80	2
SONALIPAPR	538.0	538.0	9.7	18	3
UNIONINS	59.1	59.1	5.9	100	1
CVOPRL	176.0	176.0	5.1	29	1
SIMTEX	23.6	20.8	4.1	180	2
EIL	45.0	40.0	3.9	95	5
MIRACLEIND	46.1	46.1	3.8	82	1
BATBC	557.0	479.8	3.6	7	5
SEAPEARL	112.0	112.0	3.4	30	1
HRTEX	82.8	82.8	2.9	35	1
FINEFOODS	140.0	140.0	2.9	20	1
ORIONPHARM	71.7	71.7	2.2	31	2
SONALIANS	600.0	600.0	2.2	4	2
LANKABAFIN	21.2	21.1	2.1	100	2
NAVANAPHAR	100.0	100.0	1.9	19	1
GP	261.6	261.6	1.5	6	3
Total			326.3		118

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
ENVOYTEX		0.0%	15%	Record Date	15-Feb-24

Important DSE News

PREMIERCCEM

(Q2 Un-audited): Consolidated EPS was Tk. 2.09 for October-December 2023 as against Tk. 0.07 for October-December 2022; Consolidated EPS was Tk. 2.63 for July-December 2023 as against Tk. (2.45) for July-December 2022. Consolidated NOCFPS was Tk. 5.03 for July-December 2023 as against Tk. 5.44 for July-December 2022. Consolidated NAV per share was Tk. 60.95 as on December 31, 2023 and Tk. 59.33 as on June 30, 2023.

AGNISYS

(Q2 Un-audited): EPS was Tk. 0.30 for October-December 2023 as against Tk. 0.31 for October-December 2022; EPS was Tk. 0.58 for July-December 2023 as against Tk. 0.69 for July-December 2022. NOCFPS was Tk. 0.53 for July-December 2023 as against Tk. 0.69 for July-December 2022. NAV per share was Tk. 16.53 as on December 31, 2023 and Tk. 15.95 as on June 30, 2023.

MARICO

EPS was Tk. 34.93 for October-December 2023 as against Tk. 30.93 for October-December 2022; EPS was Tk. 114.22 for April-December 2023 as against Tk. 94.45 for April-December 2022. NOCFPS was Tk. 143.15 for April-December 2023 as against Tk. 123.01 for April-December 2022. NAV per share was Tk. 228.70 as on December 31, 2023 and Tk. 84.81 as on December 31, 2022.

NAHEEACP

(Q2 Un-audited): EPS was Tk. 0.22 for October-December 2023 as against Tk. 0.12 for October-December 2022; EPS was Tk. 0.71 for July-December 2023 as against Tk. 0.30 for July-December 2022. NOCFPS was Tk. 0.39 for July-December 2023 as against Tk. 0.20 for July-December 2022. NAV per share was Tk. 19.51 as on December 31, 2023 and Tk. 19.06 as on June 30, 2023.

BBS

(Q2 Un-audited): EPS was Tk. (0.21) for October-December 2023 as against Tk. 0.02 for October-December 2022; EPS was Tk. (0.40) for July-December, 2023 as against Tk. 0.04 for July-December 2022. NOCFPS was Tk. 0.60 for July-December 2023 as against Tk. 0.55 for July-December 2022. NAV per share was Tk. 16.30 as on December 31, 2023 and Tk. 16.70 as on June 30, 2023.

NPOLYMER

(Q2 Un-audited): Consolidated EPS was Tk. 0.41 for October-December 2023 as against Tk. 0.05 for October-December 2022; Consolidated EPS was Tk. 1.01 for July-December 2023 as against Tk. 0.08 for July-December 2022. Consolidated NOCFPS was Tk. 1.09 for July-December 2023 as against Tk. 4.41 for July-December 2022. Consolidated NAV per share was Tk. 29.67 as on December 31, 2023 and Tk. 29.71 as on June 30, 2023.

RENATA

(Q2 Un-audited): Consolidated EPS was Tk. 7.68 for October-December 2023 as against Tk. 7.42 for October-December 2022; Consolidated EPS was Tk. 16.57 for July-December 2023 as against Tk. 18.28 for July-December 2022. Consolidated NOCFPS was Tk. 2.80 for July-December 2023 as against Tk. (2.50) for July-December 2022. Consolidated NAV per share was Tk. 277.23 as on December 31, 2023 and Tk. 266.87 as on June 30, 2023.

ARAMIT

(Q2 Un-audited): EPS was Tk. (0.57) for October-December 2023 as against Tk. 1.10 for October-December 2022; EPS was Tk. (0.95) for July-December 2023 as against Tk. 2.23 for July-December 2022. NOCFPS was Tk. (11.08) for July-December 2023 as against Tk. (0.22) for July-December 2022. NAV per share was Tk. 140.37 as on December 31, 2023 and Tk. 144.99 as on June 30, 2023.

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BBSCABLES

(Q2 Un-audited): EPS was Tk. 0.12 for October-December 2023 as against Tk. 0.09 for October-December 2022; EPS was Tk. (0.21) for July-December 2023 as against Tk. 0.23 for July-December 2022. NOCFPS was Tk. 0.79 for July-December 2023 as against Tk. 1.27 for July-December 2022. NAV per share was Tk. 32.58 as on December 31, 2023 and Tk. 32.99 as on June 30, 2023.

NPOLYMER

(Q2 Un-audited): Consolidated EPS was Tk. 0.41 for October-December 2023 as against Tk. 0.05 for October-December 2022; Consolidated EPS was Tk. 1.01 for July-December 2023 as against Tk. 0.08 for July-December 2022. Consolidated NOCFPS was Tk. 1.09 for July-December 2023 as against Tk. 4.41 for July-December 2022. Consolidated NAV per share was Tk. 29.67 as on December 31, 2023 and Tk. 29.71 as on June 30, 2023.

RENATA

(Q2 Un-audited): Consolidated EPS was Tk. 7.68 for October-December 2023 as against Tk. 7.42 for October-December 2022; Consolidated EPS was Tk. 16.57 for July-December 2023 as against Tk. 18.28 for July-December 2022. Consolidated NOCFPS was Tk. 2.80 for July-December 2023 as against Tk. (2.50) for July-December 2022. Consolidated NAV per share was Tk. 277.23 as on December 31, 2023 and Tk. 266.87 as on June 30, 2023.

ARAMIT

(Q2 Un-audited): EPS was Tk. (0.57) for October-December 2023 as against Tk. 1.10 for October-December 2022; EPS was Tk. (0.95) for July-December 2023 as against Tk. 2.23 for July-December 2022. NOCFPS was Tk. (11.08) for July-December 2023 as against Tk. (0.22) for July-December 2022. NAV per share was Tk. 140.37 as on December 31, 2023 and Tk. 144.99 as on June 30, 2023.

ARAMITCEM

(Q2 Un-audited): EPS was Tk. (3.86) for October-December 2023 as against Tk. (5.05) for October-December 2022; EPS was Tk. (7.88) for July-December 2023 as against Tk. (7.69) for July-December 2022. NOCFPS was Tk. (1.22) for July-December 2023 as against Tk. 3.57 for July-December 2022. NAV per share was Tk. (12.33) as on December 31, 2023 and Tk. (4.49) as on June 30, 2023.

SHYAMPSUG

(Q2 Un-audited): EPS was Tk. (10.39) for October-December 2023 as against Tk. (7.39) for October-December 2022; EPS was Tk. (21.07) for July-December 2023 as against Tk. (26.69) for July-December 2022. NOCFPS was Tk. 0.21 for July-December 2023 as against Tk. (0.01) for July-December 2022. NAV per share was Tk. (1,232.28) as on December 31, 2023 and Tk. (1,211.21) as on June 30, 2023.

NTC

(Q2 Un-audited): EPS was Tk. (36.52) for October-December 2023 as against Tk. 0.14 for October-December 2022; EPS was Tk. (40.40) for July-December 2023 as against Tk. 1.68 for July-December 2022. NOCFPS was Tk. (38.78) for July-December 2023 as against Tk. (8.99) for July-December 2022. NAV per share was Tk. (88.59) as on December 31, 2023 and Tk. (48.19) as on June 30, 2023.

APEXSPINN

(Q2 Un-audited): EPS was Tk. 1.02 for October-December 2023 as against Tk. 1.10 for October-December 2022; EPS was Tk. 1.91 for July-December 2023 as against Tk. 1.72 for July-December 2022. NOCFPS was Tk. 26.26 for July-December 2023 as against Tk. 12.68 for July-December 2022. NAV per share was Tk. 62.00 as on December 31, 2023 and Tk. 64.37 as on June 30, 2023.

APEXFOODS

(Q2 Un-audited): EPS was Tk. 0.90 for October-December 2023 as against Tk. 1.57 for October-December 2022; EPS was Tk. 3.15 for July-December 2023 as against Tk. 3.57 for July-December 2022. NOCFPS was Tk. (41.13) for July-December 2023 as against Tk. (15.55) for July-December 2022. NAV per share was Tk. 130.17 as on December 31, 2023 and Tk. 136.20 as on June 30, 2023.

DESCO

(Q2 Un-audited): EPS was Tk. (1.10) for October-December 2023 as against Tk. (0.08) for October-December 2022; EPS was Tk. (4.92) for July-December 2023 as against Tk. 0.21 for July-December 2022. NOCFPS was Tk. 2.51 for July-December 2023 as against Tk. 3.59 for July-December 2022. NAV per share was Tk. 45.72 as on December 31, 2023 and Tk. 50.62 as on June 30, 2023.

ANLIMAYARN

(Q2 Un-audited): EPS was Tk. 0.10 for October-December 2023 as against Tk. 0.07 for October-December 2022; EPS was Tk. (0.06) for July-December 2023 as against Tk. 0.08 for July-December 2022. NOCFPS was Tk. 0.06 for July-December 2023 as against Tk. 0.02 for July-December 2022. NAV per share was Tk. 10.36 as on December 31, 2023 and Tk. 10.42 as on June 30, 2023.

LEGACYFOOT

Mrs. Samina Naz, one of the Sponsors of the Company, has expressed her intention to sell her entire holdings of 3,55,284 shares of the company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

STANCERAM

The company has informed that the production in the factory is currently stopped due to the post-corona financial crisis, the current global negative situation, shortage of raw materials and closure of gas and electricity supply. Due to which the authority has decided to temporarily close the factory. The factory will stay temporarily closed from 26.01.2024 until supply of gas and electricity become normal.

DBLPBOND

The Company has requested the concerned Brokerage Houses to provide a statement with the details (Shareholder name, BO ID number, Client-wise shareholding position, gross dividend receivable, applicable tax rate and net dividend receivable) of their margin loan holders who hold DBLPBOND units as on the 'Record Date', along with the name of the contact person in this connection, to moneymarket.ops@dhakabank.com.bd, Cell No. 01753058129 on or before January 31, 2024. The Brokerage Houses are also requested to provide the company with their Bank Account name and number, routing number etc.

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