

Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.01%) gained 58.49 points and closed at 5,872.58. The blue-chip index DS30 (+0.60%), the Shariah-based index DSES (+0.72%), and the large-cap index CDSET (+0.35%) closed at 2,032.28, 1,277.57, and 1,109.25 points, respectively. All the large-cap sectors posted positive performance today. NBFi booked the highest gain of 1.86% followed by Bank (+1.13%), Engineering (+1.12%), Fuel & Power (+0.54%), Pharmaceutical (+0.48%), Food & Allied (+0.13%), and Telecommunication (-0.83%), respectively. Block trades contributed 6.7% of the overall market turnover. Orion Infusion Ltd. (+6.9%) was the most traded share with a turnover of BDT 218 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,872.58	5,814.10	+58.49	+1.01%	-6.0%
DS30	2,032.28	2,020.11	+12.17	+0.60%	-2.9%
DSES	1,277.57	1,268.38	+9.19	+0.72%	-6.3%
CDSET	1,109.25	1,105.33	+3.92	+0.35%	-7.8%

	Advanced	Declined	Unchanged	Total
All Category	305	52	44	401
A Category (Equity)	172	33	33	238
B Category (Equity)	90	10	5	105
N Category (Equity)	4	1	1	6
Z Category (Equity)	39	8	5	52
Mutual Funds	20	3	14	37
Corporate Bonds	1	4	3	8
Treasury Bonds	1	0	0	1

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,872,721	6,879,745	
	Mn USD	62,479	62,543	-0.1%
Turnover	Mn BDT	4,228	4,655	
	Mn USD	38	42	-9.2%
Volume	Mn Shares	137	161	-15.1%
No. of Trade		145,184	239,754	-39.4%

* Average Interbank Exchange Rate is BDT 110.00 as of Mar 20, 2024

Fahim Hassan
 Research Analyst

(880) 1709636546

fahim.hassan@bracepl.com

Foysal Ahmed

Research Associate

(880) 1708805201

foysal.ahmed@bracepl.com

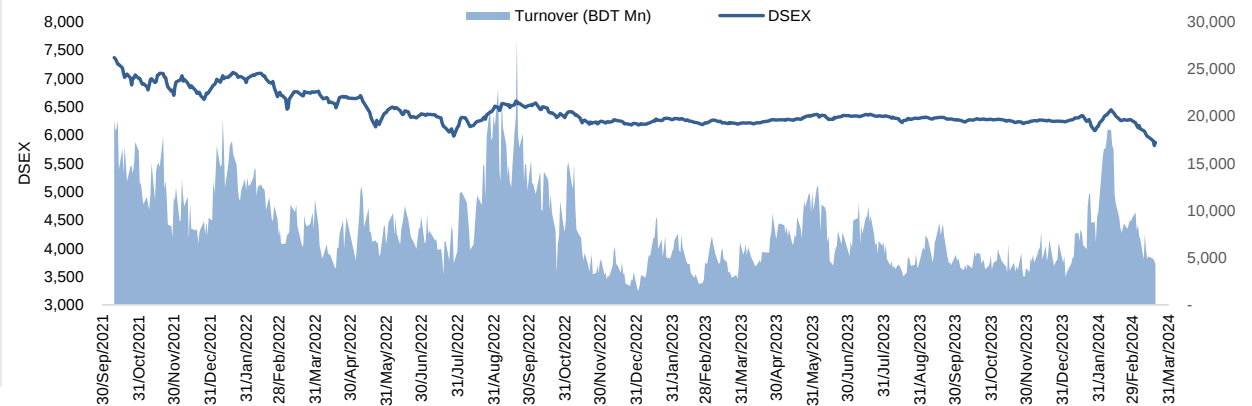


Figure: Sectorial Turnover (BDT Mn)

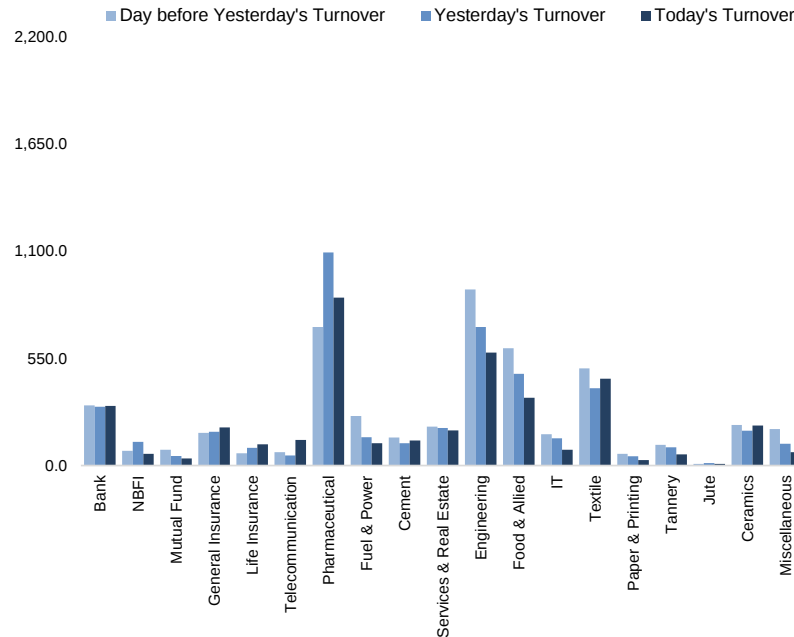
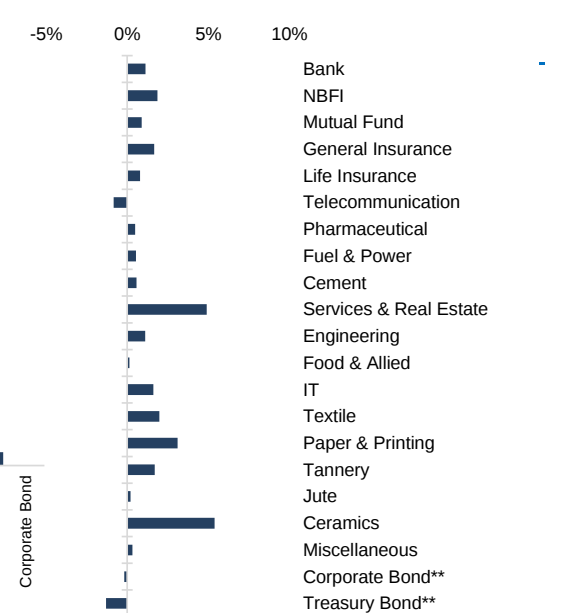


Figure: Sectorial Mcap Change



Market PE 16.6x

Market PB 1.4x

* 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	1,439	1,423	+16.01	+1.13%	36	677,755	9.9%	306.2	7.8%	12.2x	0.7x	GP	325,017	8.2%	23.9	9.8x	4.9x
NBFI	1,339	1,315	+24.51	+1.86%	23	127,955	1.9%	59.8	1.5%	NM	NM	BATBC	223,020	5.6%	69.5	12.5x	4.2x
Mutual Fund	735	729	+6.47	+0.89%	37	34,379	0.5%	36.9	0.9%	NM	0.7x	WALTONHIL	214,958	5.4%	25.3	19.4x	2.1x
General Insurance	3,497	3,439	+57.37	+1.67%	43	100,816	1.5%	195.3	4.9%	18.5x	1.6x	SQURPHARMA	191,296	4.8%	44.7	9.8x	1.6x
Life Insurance	2,167	2,150	+17.15	+0.80%	15	57,624	0.8%	109.2	2.8%	NM	NM	ROBI	139,329	3.5%	104.6	43.6x	2.1x
Telecommunication	4,211	4,246	-35.25	-0.83%	3	487,417	7.1%	131.9	3.3%	12.7x	3.3x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,409	3,393	+16.44	+0.48%	34	646,629	9.4%	861.0	21.8%	17.6x	2.0x	RENATA	96,437	2.4%	10.9	45.6x	3.0x
Fuel & Power	1,336	1,329	+7.14	+0.54%	23	342,902	5.0%	114.3	2.9%	25.0x	0.8x	UPGDCL	85,331	2.1%	2.4	12.5x	2.8x
Cement	2,569	2,554	+14.76	+0.58%	7	122,512	1.8%	128.0	3.2%	17.1x	2.5x	LHBL	84,780	2.1%	100.3	14.3x	3.8x
Services & Real Estate	1,745	1,663	+81.71	+4.91%	9	96,239	1.4%	180.6	4.6%	24.3x	0.7x	BERGERPBL	82,775	2.1%	3.9	25.4x	6.2x
Engineering	3,469	3,430	+38.41	+1.12%	42	401,640	5.9%	579.5	14.7%	18.2x	1.3x	BRACBANK	66,927	1.7%	10.8	8.9x	1.0x
Food & Allied	18,339	18,314	+24.59	+0.13%	21	336,490	4.9%	346.8	8.8%	17.4x	5.5x	BXPHERMA	52,641	1.3%	48.0	10.7x	1.2x
IT	2,934	2,887	+46.71	+1.62%	11	38,750	0.6%	81.6	2.1%	32.2x	2.5x	ISLAMIBANK	52,486	1.3%	0.0	8.5x	0.7x
Textile	1,401	1,374	+27.34	+1.99%	58	141,231	2.1%	444.4	11.3%	NM	1.0x	ICB	51,862	1.3%	0.9	NM	1.2x
Paper & Printing	9,058	8,785	+273.02	+3.11%	6	40,925	0.6%	28.0	0.7%	60.0x	2.0x	BEACONPHAR	49,295	1.2%	36.1	74.6x	7.8x
Tannery	2,743	2,697	+45.84	+1.70%	6	30,087	0.4%	57.5	1.5%	39.7x	2.8x	DUTCHBANGL	40,987	1.0%	1.7	7.4x	0.9x
Jute	18,846	18,807	+38.84	+0.21%	3	4,314	0.1%	9.0	0.2%	NM	NM	BESTHLDNG	39,933	1.0%	104.4	30.3x	0.7x
Ceramics	595	565	+30.45	+5.39%	5	26,695	0.4%	205.0	5.2%	40.3x	1.6x	UNILEVERCL	39,125	1.0%	1.2	40.7x	16.6x
Miscellaneous	4,478	4,463	+14.40	+0.32%	14	242,191	3.5%	69.1	1.8%	39.3x	1.9x	EBL	38,149	1.0%	25.6	6.2x	0.9x
Corporate Bond**	4,119	4,126	-7.50	-0.18%	13	41,900	0.6%	0.6	0.0%	NM	NM	POWERGRID	32,358	0.8%	1.4	NM	0.3x
Treasury Bond**	76	77	-1.01	-1.31%	238	2,862,111	41.7%	1.6	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SPCERAMICS	35.2	+10.0%	30.9	NM	1.1x
KPPL	26.4	+10.0%	9.9	NM	NM
GOLDENSON	21.3	+9.8%	128.7	NM	1.1x
UNIONCAP	9.0	+9.8%	2.2	NM	NM
AFTABAUTO	49.6	+9.0%	60.2	NM	1.0x
ABBANK	9.9	+8.8%	26.7	11.5x	0.3x
CRYSTALINS	103.8	+8.5%	7.4	37.4x	4x
KEYACOSMET	5.5	+7.8%	5.7	NM	0.4x
SBACBANK	9.7	+7.8%	6.4	8.1x	0.7x
TALLUSPIN	7.2	+7.5%	0.3	NM	0.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
VAMLRBBF	5.5	-3.5%	0.1	NM	0.6x
BPPL	18.5	-2.6%	13.5	18.7x	1x
ENVOYTEX	34.1	-2.6%	0.1	15.7x	0.9x
ABB1STMF	4.4	-2.2%	1.8	NM	0.5x
RELIANCINS	63.0	-2.2%	10.5	9.6x	0.9x
BARKAPOWER	16.7	-1.8%	10.5	10.0x	0.8x
JHRML	63.9	-1.7%	9.1	25.3x	1.9x
DAFODILCOM	82.2	-1.7%	7.4	NM	5.9x
PRIMETEX	17.9	-1.6%	0.7	NM	0.3x
ROBI	26.6	-1.5%	104.6	43.6x	2.1x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,789	7.1%	9.8x	1.6x
BATBC	74,086	4.3%	12.5x	4.2x
BEXIMCO	69,196	4.0%	NM	1.2x
RENATA	68,042	4.0%	45.6x	3.0x
BXPHERMA	45,564	2.7%	10.7x	1.2x
GP	38,700	2.3%	9.8x	4.9x
BEACONPHAR	34,036	2.0%	74.6x	7.8x
ISLAMIBANK	33,649	2.0%	8.5x	0.7x
BRACBANK	30,964	1.8%	8.9x	1.0x
LHBL	28,853	1.7%	14.3x	3.8x
NBL	19,116	1.1%	NM	0.8x
PUBALIBANK	18,457	1.1%	4.7x	0.7x
CITYBANK	18,190	1.1%	5.1x	0.7x
OLYMPIC	16,818	1.0%	17.8x	3.0x
ROBI	15,714	0.9%	43.6x	2.1x
BSRMLTD	14,210	0.8%	4.5x	0.6x
PRIMEBANK	13,962	0.8%	5.2x	0.7x
UPGDCL	13,547	0.8%	12.5x	2.8x
SUMITPOWER	13,369	0.8%	11.4x	0.6x
ALARABANK	13,112	0.8%	12.6x	1.1x

* 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
ORIONINFU	540.7	+6.9%	218.0	NM	37.2x
FUWANGCER	26.0	+4.8%	166.3	96.3x	2.2x
CENTRALPHL	29.1	+4.3%	147.7	NM	5.3x
GOLDENSON	21.3	+9.8%	128.7	NM	1.1x
ORIONPHARM	66.3	+2.6%	115.5	14.7x	0.7x
ROBI	26.6	-1.5%	104.6	43.6x	2.1x
BESTHLDNG	37.7	+7.4%	104.4	30.3x	0.7x
LHBL	73.0	+0.6%	100.3	14.3x	3.8x
MALEKSPIN	34.1	+7.2%	87.7	15.2x	0.7x
MONNOFABR	27.3	+6.2%	76.3	NM	1.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
EMERALDOIL	69.0	62.7	18.0	1,008	64.43
CITYGENINS	73.5	73.0	3.0	431	31.45
RUPALILIFE	133.0	133.0	4.0	215	28.60
KARNAPHULI	45.5	45.0	6.0	613	27.67
DAFODILCOM	78.2	78.1	4.0	263	20.52
BSRMLTD	90.0	90.0	1.0	200	18.00
1STPRIMFMF	38.0	38.0	9.0	446	16.96
ATLASBANG	71.5	71.5	2.0	200	14.30
PARAMOUNT	60.0	60.0	1.0	100	6.00
BEXIMCO	104.1	104.1	6.0	53	5.57

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EMERALDOIL	69.0	62.7	64.4	1,008	18
CITYGENINS	73.5	73.0	31.5	431	3
RUPALILIFE	133.0	133.0	28.6	215	4
KARNAPHULI	45.5	45.0	27.7	613	6
DAFODILCOM	78.2	78.1	20.5	263	4
BSRMLTD	90.0	90.0	18.0	200	1
1STPRIMFMF	38.0	38.0	17.0	446	9
ATLASBANG	71.5	71.5	14.3	200	2
PARAMOUNT	60.0	60.0	6.0	100	1
BEXIMCO	104.1	104.1	5.6	53	6
NATLIFEINS	106.0	106.0	5.3	50	1
BERGERPBL	1,790.0	1,790.0	5.0	3	1
UNIONINS	48.6	48.6	4.3	89	3
SONALIPAPR	522.5	522.5	4.2	8	1
BBSCABLES	39.7	39.7	3.6	90	1
YPL	19.0	19.0	2.9	150	1
GP	240.5	240.5	2.4	10	2
MARICO	2,470.0	2,470.0	2.1	1	1
SILCOPHL	17.2	17.2	1.7	100	1
IMAMBUTTON	161.0	161.0	1.7	10	1
LOVELLO	45.7	45.7	1.5	33	1
IPDC	29.2	29.2	1.5	50	1
Total			282.0		84

Important DSE News

BSRMLTD

Mr. Ali Asghar Badruddin Africawala, a placement shareholder who holds 9.83% shares of the company, has further expressed his intention to buy 10,00,000 shares of the company at prevailing market price through Dhaka Stock Exchange PLC. as per Rule 4 of the BSEC (Ullekhzogyo Sonkhyok Share Orjon, Odhigrohon o Kortritto Grohon) Bidhimala, 2018.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
UNITEDINS		0.0%	10%	Record Date	21-Mar-24
LHBL		0.0%	50%	Record Date	24-Mar-24
EASTLAND		0.0%	10%	Record Date	2-Apr-24
UNILEVERCL		0.0%	300%	Record Date	2-Apr-24
IDLC		0.0%	15%	Record Date	4-Apr-24
DBH		0.0%	15%	Record Date	9-Apr-24

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