

Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.18%) gained 69.08 points and closed at 5,941.66. The blue-chip index DS30 (+1.25%), the Shariah-based index DSES (+1.21%), and the large-cap index CDSET (+0.80%) closed at 2,057.72, 1,293.03, and 1,118.10 points, respectively. Most of the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 2.32% followed by NBFI (+1.89%), Pharmaceutical (+1.19%), Fuel & Power (+0.88%), Food & Allied (+0.85%), Engineering (+0.76%), and Bank (+0.66%), respectively. Block trades contributed 5.0% of the overall market turnover. Best Holdings Limited (+5.0%) was the most traded share with a turnover of BDT 299 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,941.66	5,872.58	+69.08	+1.18%	-4.9%
DS30	2,057.72	2,032.28	+25.44	+1.25%	-1.7%
DSES	1,293.03	1,277.57	+15.46	+1.21%	-5.2%
CDSET	1,118.10	1,109.25	+8.85	+0.80%	-7.0%

	Advanced	Declined	Unchanged	Total
All Category	303	44	50	397
A Category (Equity)	182	28	24	234
B Category (Equity)	83	9	13	105
N Category (Equity)	4	1	0	5
Z Category (Equity)	34	6	13	53
Mutual Funds	25	4	8	37
Corporate Bonds	0	3	0	3
Treasury Bonds	1	1	0	2

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,925,400	6,872,721	+0.8%
	Mn USD	62,958	62,479	
Turnover	Mn BDT	6,101	4,228	+44.3%
	Mn USD	55	38	
Volume	Mn Shares	188	137	+37.1%
No. of Trade		174,210	145,184	+20.0%

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

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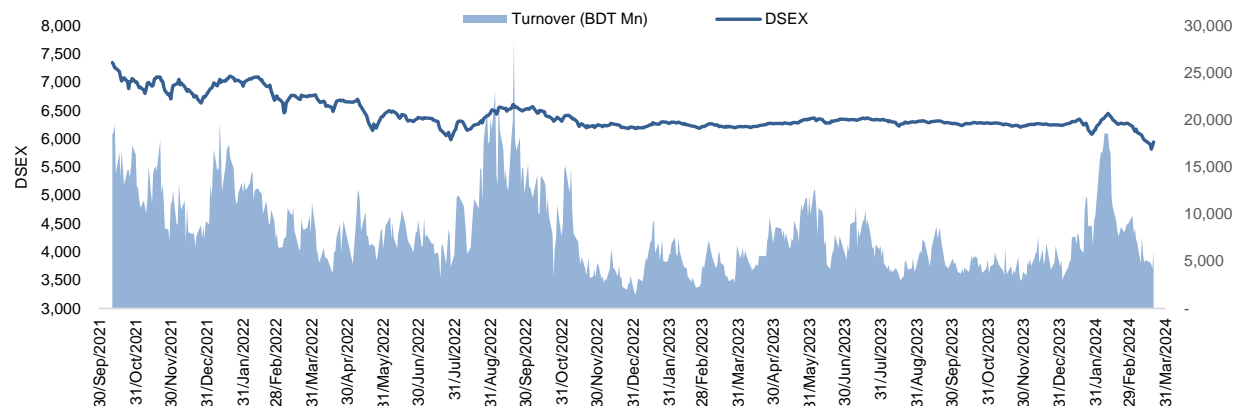


Figure: Sectorial Turnover (BDT Mn)

■ Day before Yesterday's Turnover ■ Yesterday's Turnover ■ Today's Turnover

2,200.0

1,650.0

1,100.0

550.0

0.0

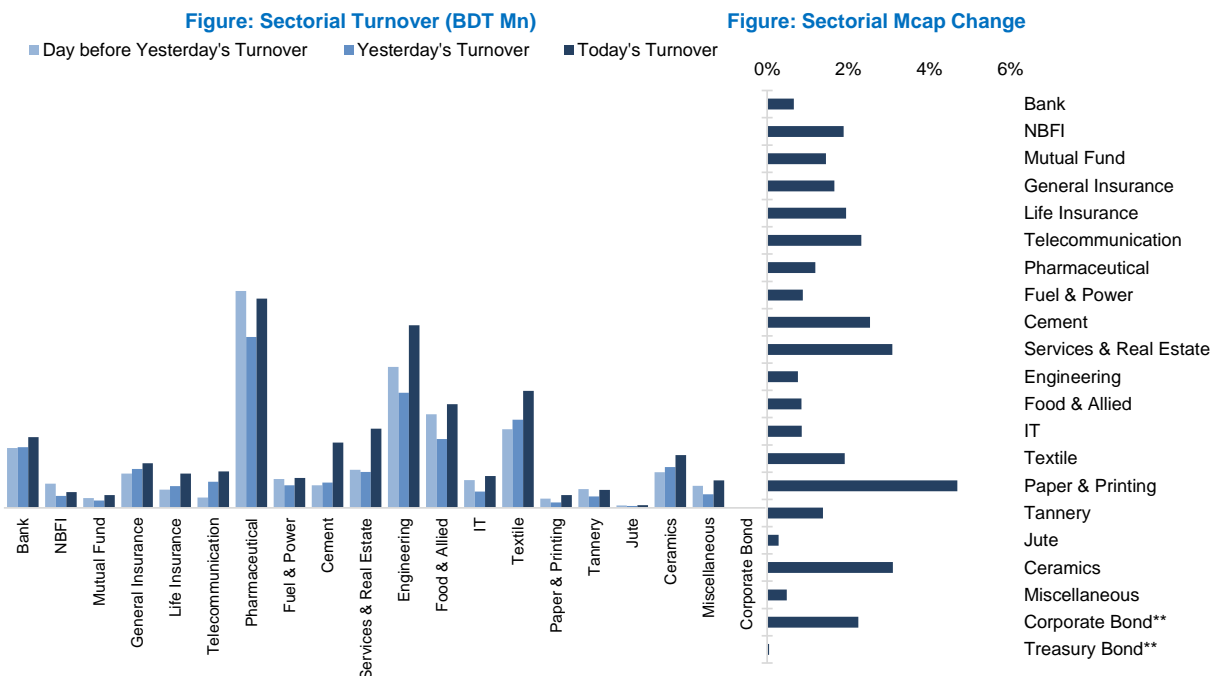


Figure: Sectorial Mcap Change

0% 2% 4% 6%

Market PE 16.8x

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	1,448	1,439	+9.50	+0.66%	36	682,229	9.9%	356.6	6.2%	12.2x	0.7x	GP	324,882	8.1%	40.8	9.8x	4.9x
NBFI	1,365	1,339	+25.29	+1.89%	23	130,371	1.9%	80.1	1.4%	NM	NM	BATBC	225,288	5.6%	71.6	12.6x	4.2x
Mutual Fund	746	735	+10.66	+1.45%	37	34,877	0.5%	64.0	1.1%	NM	0.7x	WALTONHIL	216,139	5.4%	16.0	19.5x	2.1x
General Insurance	3,555	3,497	+58.08	+1.66%	43	102,490	1.5%	224.5	3.9%	18.8x	1.6x	SQURPHARMA	192,626	4.8%	70.4	9.8x	1.6x
Life Insurance	2,210	2,167	+42.25	+1.95%	15	58,747	0.8%	173.2	3.0%	NM	NM	ROBI	150,329	3.7%	140.0	47.0x	2.2x
Telecommunication	4,309	4,211	+97.85	+2.32%	3	498,743	7.2%	183.2	3.2%	13.0x	3.4x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,450	3,409	+40.63	+1.19%	34	654,336	9.5%	1,054.4	18.2%	17.8x	2.0x	RENATA	96,792	2.4%	9.3	45.7x	3.0x
Fuel & Power	1,348	1,336	+11.73	+0.88%	23	345,913	5.0%	151.3	2.6%	25.2x	0.8x	UPGDCL	86,664	2.1%	1.7	12.6x	2.8x
Cement	2,634	2,569	+65.27	+2.54%	7	125,625	1.8%	328.5	5.7%	17.5x	2.6x	LHBL	86,058	2.1%	258.8	14.5x	3.9x
Services & Real Estate	1,799	1,745	+53.93	+3.09%	9	99,213	1.4%	399.1	6.9%	25.1x	0.7x	BERGERPBL	83,160	2.1%	2.7	25.6x	6.2x
Engineering	3,495	3,469	+26.37	+0.76%	42	404,693	5.9%	920.1	15.9%	18.4x	1.3x	BRACBANK	67,088	1.7%	36.0	9.0x	1.0x
Food & Allied	18,495	18,339	+155.81	+0.85%	21	339,348	4.9%	521.9	9.0%	17.6x	5.6x	ISLAMIBANK	52,486	1.3%	0.0	8.5x	0.7x
IT	2,959	2,934	+25.09	+0.86%	11	39,081	0.6%	160.8	2.8%	32.5x	2.6x	BXPHERMA	52,284	1.3%	122.4	10.6x	1.2x
Textile	1,428	1,401	+26.81	+1.91%	58	143,935	2.1%	589.6	10.2%	NM	1.0x	ICB	51,949	1.3%	1.4	NM	1.2x
Paper & Printing	9,484	9,058	+425.49	+4.70%	6	42,848	0.6%	64.5	1.1%	62.8x	2.1x	BEACONPHAR	50,635	1.3%	27.4	76.6x	8.0x
Tannery	2,781	2,743	+37.86	+1.38%	6	30,502	0.4%	89.9	1.6%	40.2x	2.8x	BESTHLDNG	41,946	1.0%	299.0	31.8x	0.7x
Jute	18,899	18,846	+53.10	+0.28%	3	4,326	0.1%	14.1	0.2%	NM	NM	DUTCHBANGL	40,987	1.0%	1.1	7.4x	0.9x
Ceramics	614	595	+18.49	+3.11%	5	27,524	0.4%	266.2	4.6%	41.5x	1.6x	UNILEVERCL	38,869	1.0%	2.8	40.4x	16.5x
Miscellaneous	4,499	4,478	+21.54	+0.48%	14	243,355	3.5%	137.9	2.4%	39.5x	1.9x	EBL	38,511	1.0%	24.1	6.3x	1.0x
Corporate Bond**	4,211	4,119	+92.66	+2.25%	16	42,842	0.6%	0.3	0.0%	NM	NM	POWERGRID	32,287	0.8%	3.0	NM	0.3x
Treasury Bond**	76	76	+0.03	+0.04%	238	2,863,389	41.4%	15.6	0.3%	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
MONOSPOOL	194.0	+10.0%	7.9	72.6x	11.3x	SQURPHARMA	121,789	7.1%	9.8x	1.6x	BESTHLDNG	39.6	+5.0%	299.0	31.8x	0.7x
ASIATICLAB	45.2	+10.0%	159.4	23.8x	0.9x	BATBC	74,086	4.3%	12.6x	4.2x	LHBL	74.1	+1.5%	258.8	14.5x	3.9x
SPCERAMICS	38.7	+9.9%	58.1	NM	1.2x	BEXIMCO	69,196	4.0%	NM	1.2x	GOLDENSON	22.9	+7.5%	244.3	NM	1.2x
PAPERPROC	157.1	+9.9%	12.5	81.7x	10.9x	RENATA	68,042	4.0%	45.7x	3.0x	CENTRALPHL	28.6	-1.7%	211.2	NM	5.3x
KPPL	29.0	+9.8%	13.1	NM	NM	BXPHERMA	45,564	2.7%	10.6x	1.2x	FUWANGCER	25.8	-0.8%	193.1	95.6x	2.1x
RSRMSTEEL	19.1	+9.8%	3.1	NM	0.4x	GP	38,700	2.3%	9.8x	4.9x	MALEKSPIN	35.9	+5.3%	190.1	16.0x	0.7x
PLFSL	5.0	+8.7%	9.1	NM	NM	BEACONPHAR	34,036	2.0%	76.6x	8.0x	ASIATICLAB	45.2	+10.0%	159.4	23.8x	0.9x
MIDLANDBNK	13.8	+8.7%	37.6	10.8x	1.1x	ISLAMIBANK	33,649	2.0%	8.5x	0.7x	ROBI	28.7	+7.9%	140.0	47.0x	2.2x
ROBI	28.7	+7.9%	140.0	47.0x	2.2x	BRACBANK	30,964	1.8%	9.0x	1.0x	GHAIL	19.9	+4.7%	131.7	NM	1.5x
ORIONPHARM	71.4	+7.7%	131.6	15.9x	0.8x	LHBL	28,853	1.7%	14.5x	3.9x	ORIONPHARM	71.4	+7.7%	131.6	15.9x	0.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	PUBALIBANK	18,457	1.1%	4.7x	0.6x	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
JUTESPINN	356.0	-3.7%	2.3	NM	NM	CITYBANK	18,190	1.1%	5.2x	0.7x	BSRMLTD	89.7	81.0	2.0	1,007	90.23
GHCL	26.1	-3.0%	0.3	NM	1x	OLYMPIC	16,818	1.0%	17.9x	3.0x	CENTRALINS	62.7	62.7	3.0	763	47.84
FIRSTFIN	4.7	-2.1%	0.2	NM	NM	ROBI	15,714	0.9%	47.0x	2.2x	ACFL	22.7	22.3	5.0	1,335	29.97
AIBL1STIMF	9.5	-2.1%	6.3	NM	1.0x	BSRMLTD	14,210	0.8%	4.5x	0.6x	FINEFOODS	190.0	178.0	6.0	131	23.42
ICBSONALI1	9.6	-2.0%	5.3	NM	1.4x	PRIMEBANK	13,962	0.8%	5.3x	0.7x	BDFINANCE	23.0	23.0	1.0	700	16.10
EXIMBANK	9.8	-2.0%	1.6	3.8x	0.4x	UPGDCL	13,547	0.8%	12.6x	2.8x	ATLASBANG	71.5	71.5	2.0	200	14.30
ISLAMIINS	45.7	-1.9%	0.5	12.3x	2.3x	SUMITPOWER	13,369	0.8%	11.5x	0.6x	BEXIMCO	126.7	104.1	3.0	61	7.46
SIMTEX	22.3	-1.8%	27.1	27.9x	1.0x	ALARABANK	13,112	0.8%	12.6x	1.1x	PREMIERBAN	14.7	14.1	2.0	481	6.84
CENTRALPHL	28.6	-1.7%	211.2	NM	5.3x						NATLIFEINS	106.0	106.0	1.0	50	5.30
MITHUNKIT	19.8	-1.5%	1.3	NM	6.2x						QUASEMIND	43.8	43.8	1.0	112	4.91

* 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
BSRMLTD	89.7	81.0	90.2	1,007	2
CENTRALINS	62.7	62.7	47.8	763	3
ACFL	22.7	22.3	30.0	1,335	5
FINEFOODS	190.0	178.0	23.4	131	6
BDFINANCE	23.0	23.0	16.1	700	1
ATLASBANG	71.5	71.5	14.3	200	2
BEXIMCO	126.7	104.1	7.5	61	3
PREMIERBAN	14.7	14.1	6.8	481	2
NATLIFEINS	106.0	106.0	5.3	50	1
QUASEMIND	43.8	43.8	4.9	112	1
PREMIERCEM	58.5	58.0	4.7	80	2
IMAMBUTTON	161.0	161.0	4.0	25	3
RUPALILIFE	130.0	130.0	3.6	28	1
WALTONHIL	709.6	709.6	3.5	5	1
AIL	92.5	92.5	3.4	37	2
NLTUBES	66.0	66.0	3.0	45	1
ISLAMIBANK	29.4	29.4	2.9	100	1
AGNISYSL	28.0	28.0	2.8	100	2
HRTEX	87.5	87.5	2.6	30	1
AL-HAJTEX	149.0	149.0	2.5	17	1
LOVELLO	50.2	50.2	2.5	50	1
MEGHNALIFE	84.5	84.5	2.3	28	1
Total			304.7		69

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

Important DSE News

SQURPHARMA

Mr. Samuel S Chowdhury, one of the Directors of the Company, has expressed his intention to buy 2,000,000 shares of the company at prevailing market price (in the Public and Block Market) through Dhaka Stock Exchange PLC. within April 30, 2024.

ESQUIRENIT

The Company has informed that the Board of Directors of the Company in its Meeting held on 20th March 2024 approved the investment decision amounting to BDT 50.00 million (BDT fifty million only) for its subsidiary L' Esquire Limited. This investment is part of a continued investment by the Company in a subsidiary Company that will meet upcoming export opportunities and secure Profit and Dividend for the Company. The Company will invest this amount of BDT 50.00 million (BDT fifty million only) in its subsidiary Company by withdrawing the same amount invested by the Company in Impress Capital Limited, where the total investment of the Company was BDT 100.00 million (BDT hundred million only) in Impress Capital Limited.

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