

Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.13%) lost 66.73 points and closed at 5,834.39. The blue-chip index DS30 (-1.27%), the Shariah-based index DSES (-1.39%), and the large-cap index CDSET (-1.02%) closed at 2,024.93, 1,267.17, and 1,104.38 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 3.28% followed by Pharmaceutical (-1.30%), Engineering (-1.25%), Food & Allied (-0.87%), Telecommunication (-0.68%), Bank (-0.64%), and Fuel & Power (-0.34%), respectively. Block trades contributed 8.7% of the overall market turnover. (+2.6%) was the most traded share with a turnover of BDT 320 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,834.39	5,901.12	-66.73	-1.13%	-6.6%
DS30	2,024.93	2,051.05	-26.12	-1.27%	-3.3%
DSES	1,267.17	1,285.03	-17.86	-1.39%	-7.1%
CDSET	1,104.38	1,115.79	-11.41	-1.02%	-8.2%

	Advanced	Declined	Unchanged	Total
All Category	41	318	34	393
A Category (Equity)	22	184	26	232
B Category (Equity)	8	95	2	105
N Category (Equity)	2	2	0	4
Z Category (Equity)	9	37	6	52
Mutual Funds	3	25	9	37
Corporate Bonds	1	1	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,837,008	6,883,864	
	Mn USD	62,155	62,581	-0.7%
Turnover	Mn BDT	4,455	5,803	
	Mn USD	41	53	-23.2%
Volume	Mn Shares	136	188	-27.9%
No. of Trade		142,137	189,990	-25.2%

* Average Interbank Exchange Rate is BDT 110.00 as of Mar 25, 2024

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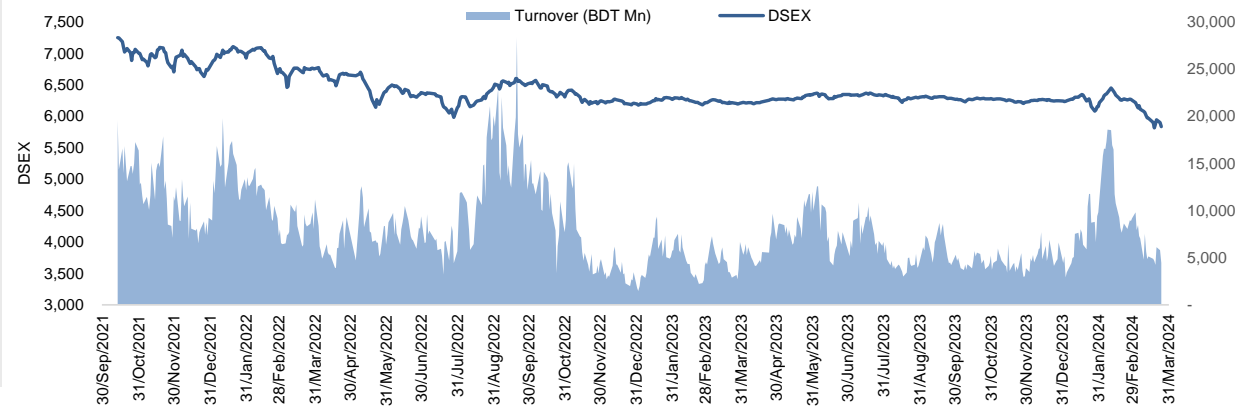


Figure: Sectorial Turnover (BDT Mn)

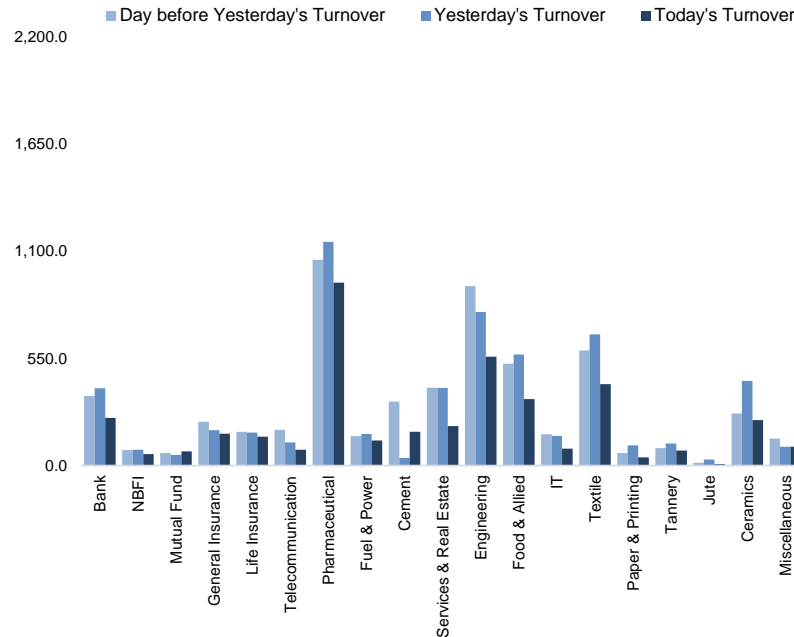
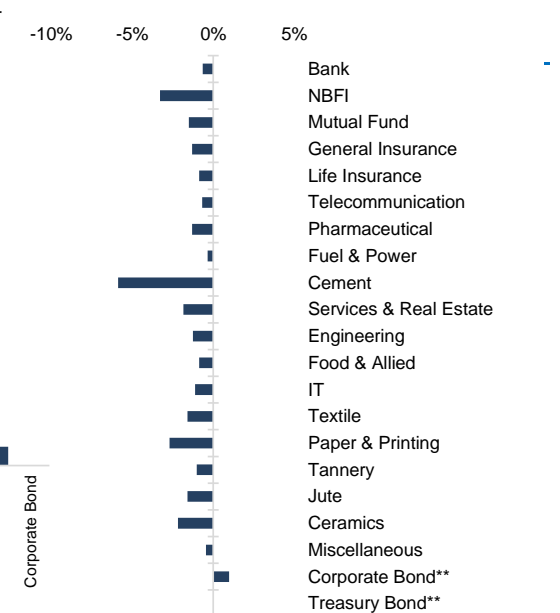


Figure: Sectorial Mcap Change



Market PE 16.5x

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	1,433	1,442	-9.24	-0.64%	36	675,158	9.9%	244.6	6.0%	12.1x	0.7x	GP	326,232	8.3%	21.2	9.9x	4.9x
NBFI	1,299	1,343	-44.01	-3.28%	23	124,125	1.8%	59.1	1.5%	NM	NM	BATBC	223,236	5.6%	54.1	12.5x	4.2x
Mutual Fund	727	738	-11.05	-1.50%	37	33,990	0.5%	72.3	1.8%	NM	0.7x	WALTONHIL	211,020	5.3%	7.1	19.0x	2.0x
General Insurance	3,456	3,501	-45.41	-1.30%	43	99,637	1.5%	163.2	4.0%	18.2x	1.5x	SQURPHARMA	192,980	4.9%	67.3	9.8x	1.6x
Life Insurance	2,192	2,211	-19.10	-0.86%	15	58,272	0.9%	147.9	3.6%	NM	NM	ROBI	139,853	3.5%	57.7	43.8x	2.1x
Telecommunication	4,222	4,251	-28.80	-0.68%	3	488,710	7.2%	81.7	2.0%	12.7x	3.3x	BEXIMCO	103,842	2.6%	0.0	NM	1.2x
Pharmaceutical	3,395	3,440	-44.79	-1.30%	33	642,773	9.4%	937.3	23.0%	17.5x	1.9x	RENATA	93,696	2.4%	9.5	44.3x	2.9x
Fuel & Power	1,323	1,328	-4.47	-0.34%	23	339,666	5.0%	128.1	3.1%	24.7x	0.8x	UPGDCL	83,708	2.1%	0.9	12.2x	2.7x
Cement	2,463	2,617	-153.70	-5.87%	7	117,467	1.7%	173.0	4.3%	16.4x	2.4x	BERGERPBL	82,567	2.1%	3.5	25.4x	6.1x
Services & Real Estate	1,713	1,745	-32.10	-1.84%	9	94,445	1.4%	202.0	5.0%	23.9x	0.7x	LHBL	79,206	2.0%	148.9	13.3x	3.6x
Engineering	3,398	3,441	-43.00	-1.25%	42	393,445	5.8%	557.4	13.7%	17.9x	1.3x	BRACBANK	65,962	1.7%	5.9	8.8x	1.0x
Food & Allied	18,310	18,471	-160.77	-0.87%	21	335,966	4.9%	339.9	8.4%	17.4x	5.5x	ISLAMIBANK	52,486	1.3%	0.0	8.5x	0.7x
IT	2,874	2,907	-32.45	-1.12%	11	37,961	0.6%	86.3	2.1%	31.5x	2.5x	BXPHARMA	52,418	1.3%	17.3	10.7x	1.2x
Textile	1,381	1,403	-22.25	-1.59%	58	139,175	2.0%	416.8	10.2%	NM	0.9x	ICB	48,740	1.2%	1.7	NM	1.1x
Paper & Printing	9,170	9,423	-253.39	-2.69%	6	41,428	0.6%	41.8	1.0%	60.8x	2.0x	BEACONPHAR	47,216	1.2%	22.9	71.5x	7.5x
Tannery	2,712	2,740	-27.92	-1.02%	6	29,751	0.4%	77.5	1.9%	39.2x	2.7x	DUTCHBANGL	40,463	1.0%	1.4	7.3x	0.9x
Jute	18,613	18,914	-301.66	-1.59%	3	4,261	0.1%	7.6	0.2%	NM	NM	BESTHLDNG	39,509	1.0%	142.2	30.0x	0.7x
Ceramics	599	612	-13.30	-2.17%	5	26,833	0.4%	233.2	5.7%	40.5x	1.6x	UNILEVERCL	39,004	1.0%	0.9	40.6x	16.6x
Miscellaneous	4,465	4,485	-19.66	-0.44%	15	242,769	3.6%	96.8	2.4%	39.4x	1.9x	EBL	38,028	1.0%	16.7	6.2x	0.9x
Corporate Bond**	4,255	4,214	+41.19	+0.98%	16	42,967	0.6%	0.4	0.0%	NM	NM	POWERGRID	32,001	0.8%	2.0	NM	0.3x
Treasury Bond**	76	76	-	-	238	2,857,465	41.9%	0.0	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
RUPALILIFE	146.7	+4.9%	77.6	NM	NM	SQURPHARMA	121,789	7.1%	9.8x	1.6x	ASIATICLAB	51.0	+2.6%	319.5	26.9x	1.0x
ARAMIT	281.0	+4.2%	16.0	NM	2.0x	BATBC	74,086	4.3%	12.5x	4.2x	CENTRALPHL	29.3	+2.4%	197.1	NM	5.4x
MEGHNA PET	36.3	+4.0%	2.0	NM	NM	BEXIMCO	69,196	4.0%	NM	1.2x	LHBL	68.2	-8.0%	148.9	13.3x	3.6x
EIL	41.3	+3.5%	38.7	35.6x	2.2x	RENATA	68,042	4.0%	44.3x	2.9x	BESTHLDNG	37.3	-1.8%	142.2	30.0x	0.7x
CITYGENINS	76.9	+3.4%	27.0	25.5x	3.8x	BXPHARMA	45,564	2.7%	10.7x	1.2x	GOLDENSON	21.2	-4.1%	137.7	NM	1.1x
NEWLINE	43.2	+2.9%	0.5	22.9x	1.7x	GP	38,700	2.3%	9.9x	4.9x	AIL	94.4	-0.1%	120.6	45.0x	3.9x
ASIATICLAB	51.0	+2.6%	319.5	26.9x	1x	BEACONPHAR	34,036	2.0%	71.5x	7.5x	SPCERAMICS	39.9	-0.2%	116.9	NM	1.3x
SUMITPOWER	24.0	+2.6%	11.2	11.6x	0.6x	ISLAMIBANK	33,649	2.0%	8.5x	0.7x	FUWANGCER	25.1	-2.3%	110.5	93.0x	2.1x
ICBIBANK	4.1	+2.5%	0.9	NM	NM	BRACBANK	30,964	1.8%	8.8x	1.0x	ORIONPHARM	68.2	-2.6%	86.4	15.2x	0.8x
ICBAGRANI1	8.3	+2.5%	0.5	NM	1.1x	LHBL	28,853	1.7%	13.3x	3.6x	MALEKSPIN	36.0	+0.6%	86.1	16.0x	0.7x
						NBL	19,116	1.1%	NM	0.8x						
						PUBALIBANK	18,457	1.1%	4.7x	0.7x						
						CITYBANK	18,190	1.1%	5.3x	0.7x						
						OLYMPIC	16,818	1.0%	18.1x	3.0x						
						ROBI	15,714	0.9%	43.8x	2.1x						
						BSRMLTD	14,210	0.8%	4.5x	0.6x						
						PRIMEBANK	13,962	0.8%	5.3x	0.7x						
						UPGDCL	13,547	0.8%	12.2x	2.7x						
						SUMITPOWER	13,369	0.8%	11.6x	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

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
EBL	28.5	28.5	110.7	3,884	2
SQURPHARMA	218.0	218.0	65.4	300	1
AIL	90.1	85.2	63.8	715	12
ACFL	22.3	22.2	25.3	1,135	4
RUPALILIFE	148.0	148.0	20.7	140	2
BDFINANCE	25.1	25.1	17.6	700	1
KBPPWBIL	206.0	206.0	16.9	82	3
WALTONHIL	706.0	700.0	12.6	18	13
ISNLTD	50.0	50.0	6.1	121	2
CITYGENINS	68.0	68.0	5.4	80	1
FINEFOODS	185.7	164.1	4.2	24	3
BANGAS	110.0	110.0	4.2	38	1
RAHIMAFOOD	174.2	174.2	3.5	20	1
PREMIERBAN	13.6	13.6	3.0	224	1
ETL	15.6	15.3	3.0	196	3
AGNISYSL	29.5	29.5	3.0	100	1
LOVELLO	55.3	45.4	2.8	57	3
EIL	39.5	39.0	2.8	70	4
BESTHLDNG	41.7	41.7	2.6	62	1
PDL	14.3	14.3	1.9	130	1
KARNAPHULI	46.0	46.0	1.8	40	1
CENTRALINS	60.0	60.0	1.6	27	1
Total			388.5		74

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
CENTRALINS		0.0%	12%	Record Date	30-Apr-24
ICBIBANK		0.0%	0%	Record Date	9-May-24

Important DSE News

SUMITPOWER

(Q1 Un-audited): Consolidated EPS was Tk. 0.89 for July-September 2023 as against Tk. 0.81 for July-September 2022; Consolidated NOCFPS was Tk. 1.32 for July-September 2023 as against Tk. 0.79 for July-September 2022. Consolidated NAV per share was Tk. 39.13 as on September 30, 2023 and Tk. 38.02 as on June 30, 2023.

(Q2 Un-audited): Consolidated EPS was Tk. 0.82 for October-December 2023 as against Tk. 0.76 for October-December 2022; Consolidated EPS was Tk. 1.71 for July-December 2023 as against Tk. 1.57 for July-December 2022. Consolidated NOCFPS was Tk. 2.21 for July-December 2023 as against Tk. 2.02 for July-December 2022. Consolidated NAV per share was Tk. 39.77 as on December 31, 2023 and Tk. 38.02 as on June 30, 2023

EMERALDOIL

Minori Bangladesh Ltd., a Corporate Director of the Company, has expressed its intention to sell 36,66,500 shares out of its holding of 3,52,25,004 shares of the Company at prevailing market price (In the Block Market) through Dhaka Stock Exchange PLC. (DSE) within April 30, 2024.

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