

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.71%) lost 44.11 points and closed at 6,131.14. The blue-chip index DS30 (-0.50%), the Shariah-based index DSES (-0.32%), and the large-cap index CDSET (-0.89%) closed at 2,097.71, 1,340.36, and 1,148.47 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 5.29% followed by NBF (-1.40%), Telecommunication (-1.16%), Engineering (-0.90%), Pharmaceutical (-0.48%), Bank (-0.17%), and Fuel & Power (-0.02%), respectively. Block trades contributed 6.1% of the overall market turnover. City General Insurance Co. Ltd. (+2.4%) was the most traded share with a turnover of BDT 599 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,131.14	6,175.25	-44.11	-0.71%	-1.8%
DS30	2,097.71	2,108.32	-10.61	-0.50%	+0.2%
DSES	1,340.36	1,344.64	-4.27	-0.32%	-1.7%
CDSET	1,148.47	1,158.80	-10.33	-0.89%	-4.5%

	Advanced	Declined	Unchanged	Total
All Category	102	232	63	397
A Category (Equity)	56	137	42	235
B Category (Equity)	31	66	9	106
N Category (Equity)	2	0	2	4
Z Category (Equity)	13	29	10	52
Mutual Funds	8	13	16	37
Corporate Bonds	0	3	2	5
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,482,046	7,522,247	
	Mn USD	68,019	68,384	-0.5%
Turnover	Mn BDT	8,437	7,937	+6.3%
	Mn USD	77	72	
Volume	Mn Shares	222	249	-10.9%
No. of Trade		200,352	199,587	+0.4%

* Average Interbank Exchange Rate is BDT 110.00 as of Mar 05, 2024

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Foysal Ahmed Research Associate (880) 1708805201 foysal.ahmed@bracepl.com
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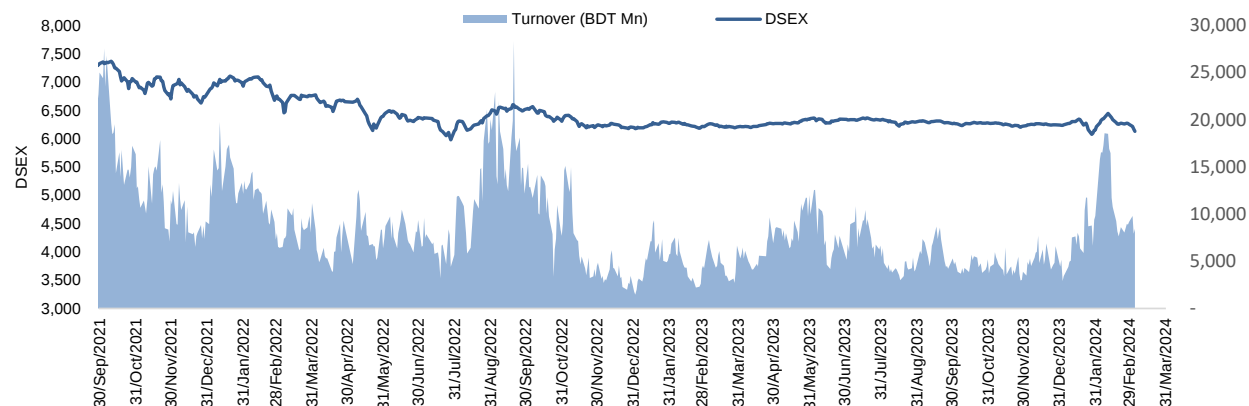


Figure: Sectorial Turnover (BDT Mn)

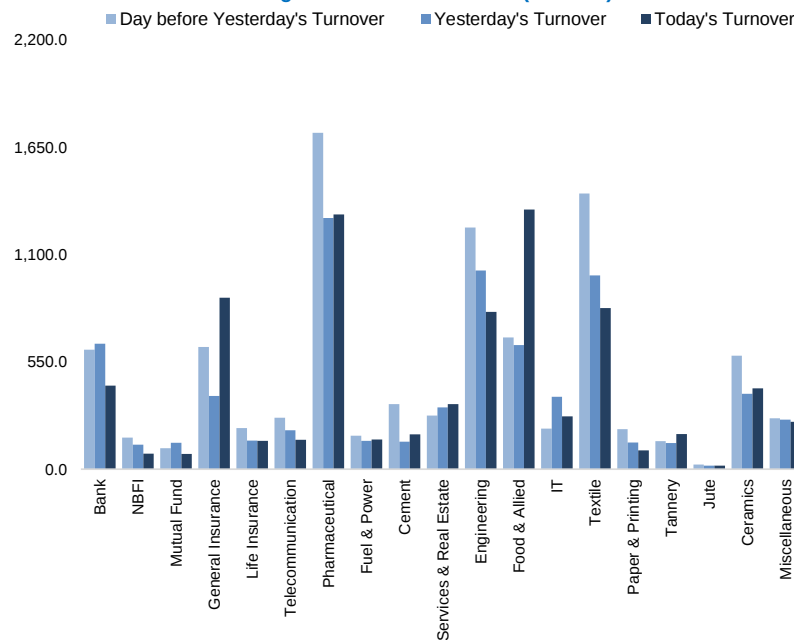
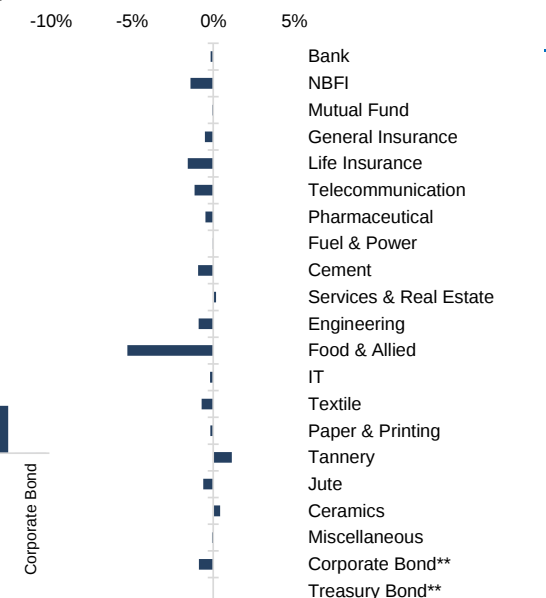


Figure: Sectorial Mcap Change



Market PE 17.4x

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	1,464	1,466	-2.44	-0.17%	36	697,375	9.3%	428.8	5.4%	12.6x	0.7x	GP	341,086	8.2%	140.2	10.3x	5.1x
NBFI	1,406	1,426	-20.00	-1.40%	23	138,191	1.9%	80.1	1.0%	NM	NM	BATBC	238,032	5.7%	415.9	13.3x	4.4x
Mutual Fund	767	768	-0.43	-0.06%	37	36,286	0.5%	78.2	1.0%	NM	0.7x	WALTONHIL	224,712	5.4%	2.4	20.3x	2.1x
General Insurance	3,635	3,654	-18.76	-0.51%	43	108,179	1.4%	879.4	11.1%	19.7x	1.7x	SQRPHARMA	190,587	4.6%	34.0	9.7x	1.6x
Life Insurance	2,283	2,319	-36.31	-1.57%	15	62,396	0.8%	145.9	1.8%	NM	NM	ROBI	157,138	3.8%	3.3	49.2x	2.4x
Telecommunication	4,457	4,509	-52.24	-1.16%	3	522,894	7.0%	151.2	1.9%	13.6x	3.5x	RENATA	106,920	2.6%	12.6	50.5x	3.4x
Pharmaceutical	3,497	3,514	-16.89	-0.48%	33	675,954	9.1%	1,305.9	16.5%	18.5x	2.1x	BEXIMCO	103,842	2.5%	0.6	NM	1.2x
Fuel & Power	1,376	1,376	-0.28	-0.02%	23	359,200	4.8%	152.6	1.9%	26.2x	0.8x	UPGDCL	93,331	2.2%	3.4	13.6x	3.0x
Cement	2,654	2,679	-25.07	-0.94%	7	128,049	1.7%	179.2	2.3%	17.7x	2.7x	LHBL	85,826	2.1%	110.7	14.4x	3.9x
Services & Real Estate	1,804	1,801	+3.15	+0.18%	9	101,063	1.4%	333.8	4.2%	25.6x	0.8x	BERGERPBL	85,572	2.0%	4.9	26.3x	6.4x
Engineering	3,552	3,584	-32.27	-0.90%	42	418,028	5.6%	806.8	10.2%	19.0x	1.4x	BRACBANK	67,732	1.6%	30.5	9.1x	1.0x
Food & Allied	19,177	20,249	-1071.45	-5.29%	21	357,241	4.8%	1,330.6	16.8%	18.5x	5.9x	BXPBARMA	57,548	1.4%	15.5	11.7x	1.3x
IT	3,104	3,110	-5.88	-0.19%	11	40,467	0.5%	271.4	3.4%	33.6x	2.7x	BEACONPHAR	54,054	1.3%	110.6	81.8x	8.5x
Textile	1,449	1,460	-10.44	-0.72%	58	150,097	2.0%	826.0	10.4%	NM	1.0x	ICB	53,944	1.3%	3.1	NM	1.3x
Paper & Printing	10,033	10,051	-17.30	-0.17%	6	38,658	0.5%	96.3	1.2%	56.7x	1.9x	ISLAMIBANK	52,486	1.3%	0.0	8.5x	0.7x
Tannery	2,819	2,787	+31.82	+1.14%	6	31,910	0.4%	179.6	2.3%	42.1x	2.9x	UNILEVERCL	42,481	1.0%	6.6	42.9x	20.5x
Jute	18,702	18,817	-114.74	-0.61%	3	4,355	0.1%	18.3	0.2%	NM	NM	DUTCHBANGL	42,408	1.0%	1.3	7.7x	1.0x
Ceramics	631	628	+2.72	+0.43%	5	29,170	0.4%	414.2	5.2%	44.0x	1.7x	BESTHLDNG	41,840	1.0%	226.8	31.8x	0.7x
Miscellaneous	4,525	4,528	-3.28	-0.07%	14	247,171	3.3%	242.3	3.1%	40.1x	1.9x	EBL	36,821	0.9%	16.4	6.5x	1.0x
Corporate Bond**	4,265	4,303	-37.64	-0.87%	13	42,771	0.6%	0.5	0.0%	NM	NM	POWERGRID	33,641	0.8%	2.0	NM	0.3x
Treasury Bond**	86	86	-	-	240	3,272,496	43.9%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GOLDENSON	17.2	+9.6%	33.1	NM	0.9x
FUWANGCER	30.6	+7.4%	370.6	NM	2.5x
GQBALLPEN	131.6	+5.7%	67.3	NM	1.1x
ICBIBANK	4.2	+5.0%	1.2	NM	NM
NEWLINE	41.9	+4.8%	0.1	22.2x	1.7x
HRTEX	108.3	+4.7%	54.0	NM	2.6x
BEACHHATCH	66.7	+4.7%	104.2	40.4x	6x
BIFC	7.2	+4.3%	0.0	NM	NM
FIRSTFIN	5.0	+4.2%	0.2	NM	NM
BDAUTOCA	127.7	+3.8%	14.4	NM	17.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQRPHARMA	121,789	7.1%	9.7x	1.6x
BATBC	74,086	4.3%	13.3x	4.4x
BEXIMCO	69,196	4.0%	NM	1.2x
RENATA	68,042	4.0%	50.5x	3.4x
BXPBARMA	45,564	2.7%	11.7x	1.3x
GP	38,700	2.3%	10.3x	5.1x
BEACONPHAR	34,036	2.0%	81.8x	8.5x
ISLAMIBANK	33,649	2.0%	8.5x	0.7x
BRACBANK	30,964	1.8%	9.1x	1.0x
LHBL	28,853	1.7%	14.4x	3.9x
NBL	19,116	1.1%	NM	0.8x
PUBALIBANK	18,457	1.1%	4.9x	0.7x
CITYBANK	18,190	1.1%	5.1x	0.7x
OLYMPIC	16,818	1.0%	18.2x	3.0x
ROBI	15,714	0.9%	49.2x	2.4x
BSRMLTD	14,210	0.8%	4.5x	0.6x
PRIMEBANK	13,962	0.8%	5.5x	0.8x
UPGDCL	13,547	0.8%	13.6x	3.0x
SUMITPOWER	13,369	0.8%	12.3x	0.7x
ALARABANK	13,112	0.8%	12.6x	1.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CITYGENINS	72.2	+2.4%	599.4	23.9x	3.5x
BATBC	440.8	-8.1%	415.9	13.3x	4.4x
FUWANGCER	30.6	+7.4%	370.6	NM	2.5x
CENTRALPHL	29.5	-2.0%	279.0	NM	5.4x
LOVELLO	49.6	+3.3%	240.0	45.9x	4.0x
BESTHLDNG	39.5	+0.5%	226.8	31.8x	0.7x
ADVENT	32.9	+2.8%	209.0	33.6x	2.1x
OLYMPIC	151.2	+3.5%	171.9	18.2x	3.0x
FORTUNE	55.6	+3.3%	163.3	53.3x	3.6x
MONNOFABR	30.9	-1.6%	158.8	NM	1.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ACTIVEFINE	17.4	-9.8%	102.1	NM	0.8x
AFCAGRO	18.6	-9.7%	33.7	NM	1x
BATBC	440.8	-8.1%	415.9	13.3x	4.4x
PRIMETEX	21.8	-6.8%	6.9	NM	0.3x
FAREASTLIF	49.7	-6.4%	15.7	NM	NM
FAMILYTEX	4.2	-4.5%	4.5	NM	0.4x
SEMILLECMF	8.6	-4.4%	4.9	NM	1.0x
MIRACLEIND	43.9	-4.4%	41.4	NM	2.7x
RNSPIN	15.8	-4.2%	0.8	NM	1.5x
TALLUSPIN	7.3	-3.9%	1.6	NM	0.4x

* 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 (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NTC	460.0	460.0	2.0	435	200.10
EBL	27.3	27.3	4.0	3,700	101.01
UTTARABANK	25.8	25.8	1.0	2,000	51.60
HRTEX	112.5	93.9	11.0	445	47.57
BESTHLDNG	40.6	40.6	3.0	673	27.32
BEACHHATCH	67.4	63.8	7.0	203	13.06
LINDEBD	1,309.0	1,309.0	1.0	7	8.77
ORIONINFU	698.0	689.8	2.0	12	8.07
CENTRALINS	59.0	59.0	1.0	116	6.84
ROBI	32.8	29.5	5.0	166	5.16

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade	Important DSE News
NTC	460.0	460.0	200.1	435	2	CNW Trading of the shares of Asiatic Laboratories Limited will start at DSE from March 06, 2024 under 'N' category. DSE Trading Code for Asiatic Laboratories Limited is "ASIATICLAB" and DSE Company Code is 18498 under 'Pharmaceuticals & Chemicals' sector.
EBL	27.3	27.3	101.0	3,700	4	
UTTARABANK	25.8	25.8	51.6	2,000	1	
HRTEX	112.5	93.9	47.6	445	11	
BESTHLDNG	40.6	40.6	27.3	673	3	
BEACHHATCH	67.4	63.8	13.1	203	7	
LINDEBD	1,309.0	1,309.0	8.8	7	1	
ORIONINFU	698.0	689.8	8.1	12	2	
CENTRALINS	59.0	59.0	6.8	116	1	
ROBI	32.8	29.5	5.2	166	5	
RDFOOD	41.4	41.4	4.9	118	1	
RUPALILIFE	119.8	119.8	4.9	41	1	
CITYGENINS	71.0	70.2	4.7	67	4	
EMERALDOIL	79.0	79.0	3.8	48	2	
BNICL	52.7	52.7	3.7	70	1	
FUWANGFOOD	35.0	35.0	3.5	100	1	
SIMTEX	24.1	23.0	3.3	140	2	
BEXIMCO	115.6	104.1	2.7	25	5	
SUNLIFEINS	51.0	51.0	2.6	50	1	
BDTHAI	32.7	32.0	1.7	54	2	
GQBALLPEN	124.0	124.0	1.6	13	2	
AFTABAUTO	56.6	56.6	1.4	25	2	
Total			516.2		71	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
RELIANCINS		0.0%	25%	Record Date	6-Mar-24
GREENDELT		0.0%	25%	Record Date	6-Mar-24
BDTHAIFOOD		0.0%	1%	Record Date	7-Mar-24
CRYSTALINS		0.0%	10%	Record Date	12-Mar-24
CITYGENINS		7.0%	12%	Record Date	12-Mar-24
SUMITPOWER		0.0%	10%	Record Date	14-Mar-24
ROBI		0.0%	10%	Record Date	18-Mar-24
UNITEDINS		0.0%	10%	Record Date	21-Mar-24
LHBL		0.0%	50%	Record Date	24-Mar-24

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