

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.87%) lost 53.38 points and closed at 6,112.76. The blue-chip index DS30 (-0.57%), the Shariah-based index DSES (-0.53%), and the large-cap index CDSET (-0.53%) closed at 2,094.34, 1,335.89, and 1,151.34 points, respectively. All the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 2.62% followed by NBF (1.91%), Fuel & Power (-0.92%), Telecommunication (-0.88%), Engineering (-0.74%), Bank (-0.53%), and Pharmaceutical (-0.28%), respectively. Block trades contributed 9.1% of the overall market turnover. Fu-Wang Ceramic Industries Ltd. (+1.0%) was the most traded share with a turnover of BDT 409 million.

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,112.76	6,166.14	-53.38	-0.87%	-2.1%
DS30	2,094.34	2,106.35	-12.00	-0.57%	+0.0%
DSES	1,335.89	1,343.01	-7.12	-0.53%	-2.1%
CDSET	1,151.34	1,157.47	-6.13	-0.53%	-4.3%

	Advanced	Declined	Unchanged	Total
All Category	46	304	46	396
A Category (Equity)	21	180	33	234
B Category (Equity)	13	87	5	105
N Category (Equity)	2	3	0	5
Z Category (Equity)	10	34	8	52
Mutual Funds	2	17	18	37
Corporate Bonds	1	2	2	5
Treasury Bonds	0	1	0	1

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,488,277	7,521,761	-0.4%
	Mn USD	68,075	68,380	
Turnover	Mn BDT	7,037	7,304	-3.7%
	Mn USD	64	66	
Volume	Mn Shares	207	201	+3.0%
No. of Trade		183,723	182,749	+0.5%

\* Average Interbank Exchange Rate is BDT 110.00 as of Mar 07, 2024

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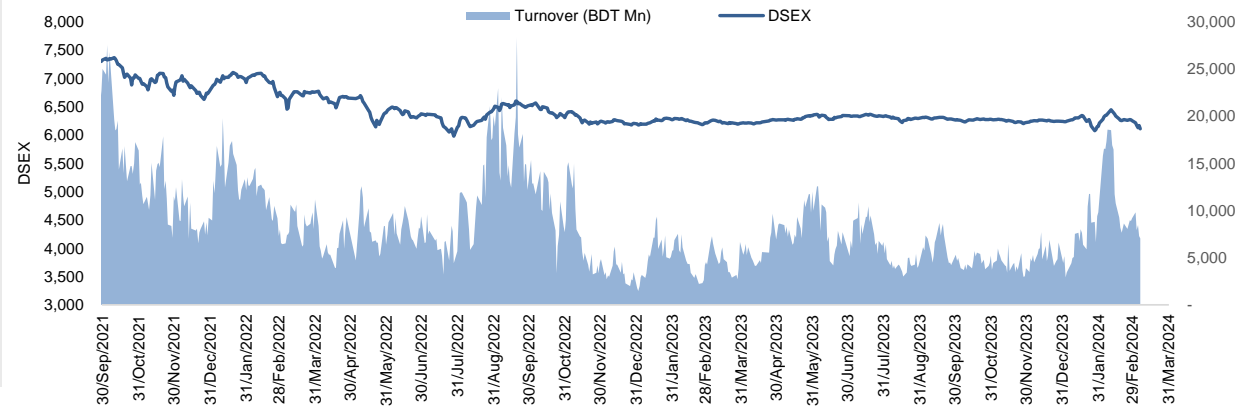


Figure: Sectorial Turnover (BDT Mn)

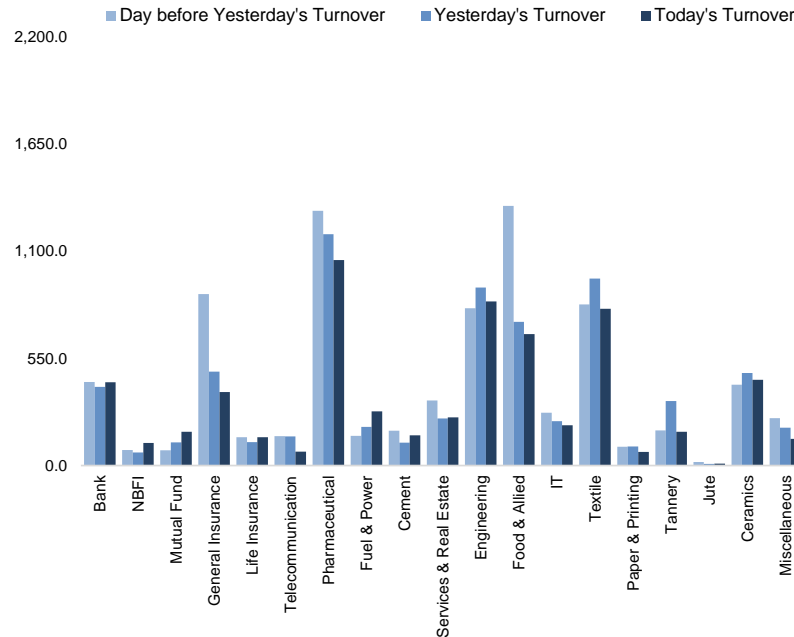
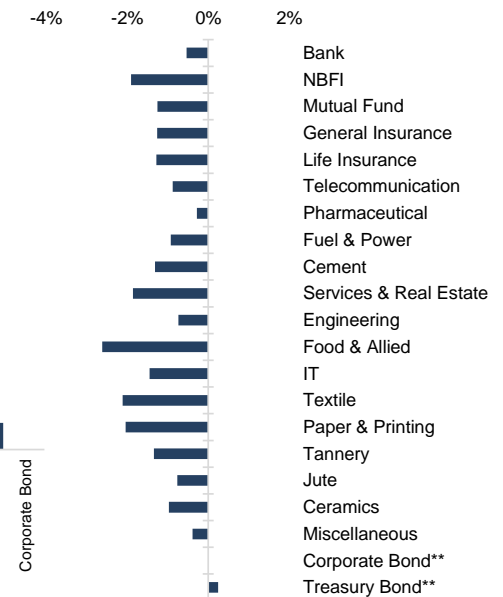


Figure: Sectorial Mcap Change



Market PE 17.4x

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	1,457	1,464	-7.78	-0.53%	36	693,859	9.3%	426.4	6.7%	12.5x	0.7x	GP	342,301	8.2%	59.8	10.4x	5.1x
NBFI	1,379	1,406	-26.81	-1.91%	23	135,488	1.8%	116.0	1.8%	NM	NM	BATBC	244,566	5.9%	151.5	13.7x	4.6x
Mutual Fund	760	769	-9.64	-1.25%	37	35,936	0.5%	173.7	2.7%	NM	0.7x	WALTONHIL	220,471	5.3%	3.5	19.9x	2.1x
General Insurance	3,632	3,678	-46.30	-1.26%	43	108,078	1.4%	376.6	5.9%	19.7x	1.7x	SQURPHARMA	190,942	4.6%	102.4	9.7x	1.6x
Life Insurance	2,258	2,288	-29.32	-1.28%	15	61,721	0.8%	145.0	2.3%	NM	NM	ROBI	157,138	3.8%	0.3	49.2x	2.4x
Telecommunication	4,466	4,506	-39.64	-0.88%	3	523,960	7.0%	71.0	1.1%	13.6x	3.5x	RENATA	105,922	2.5%	14.7	50.1x	3.3x
Pharmaceutical	3,496	3,506	-9.89	-0.28%	34	678,387	9.1%	1,053.3	16.5%	18.5x	2.0x	BEXIMCO	103,842	2.5%	0.0	NM	1.2x
Fuel & Power	1,366	1,379	-12.71	-0.92%	23	356,702	4.8%	278.1	4.3%	26.0x	0.8x	UPGDCL	92,519	2.2%	4.3	13.5x	3.0x
Cement	2,610	2,645	-34.67	-1.31%	7	125,947	1.7%	154.5	2.4%	17.6x	2.6x	LHBL	85,129	2.0%	80.7	14.3x	3.8x
Services & Real Estate	1,752	1,785	-33.21	-1.86%	9	98,146	1.3%	246.9	3.9%	24.8x	0.7x	BERGERPBL	85,038	2.0%	6.6	26.1x	6.3x
Engineering	3,495	3,521	-25.98	-0.74%	42	411,328	5.5%	841.1	13.1%	18.7x	1.4x	BRACBANK	67,249	1.6%	17.4	9.0x	1.0x
Food & Allied	19,493	20,017	-523.55	-2.62%	21	363,122	4.9%	674.3	10.5%	18.8x	6.0x	BEACONPHAR	57,473	1.4%	132.8	87.0x	9.1x
IT	3,041	3,086	-44.58	-1.44%	11	39,647	0.5%	206.6	3.2%	32.9x	2.6x	BXPHERMA	57,325	1.4%	19.9	11.7x	1.3x
Textile	1,432	1,463	-30.93	-2.11%	58	148,331	2.0%	803.0	12.5%	NM	1.0x	ICB	53,423	1.3%	0.5	NM	1.2x
Paper & Printing	9,872	10,078	-205.27	-2.04%	6	38,038	0.5%	69.9	1.1%	55.8x	1.8x	ISLAMIBANK	52,486	1.3%	0.0	8.5x	0.7x
Tannery	2,792	2,829	-37.83	-1.34%	6	31,606	0.4%	173.2	2.7%	41.7x	2.9x	UNILEVERCL	42,770	1.0%	9.2	43.2x	20.7x
Jute	18,656	18,799	-143.51	-0.76%	3	4,344	0.1%	10.2	0.2%	NM	NM	DUTCHBANG	42,482	1.0%	0.8	7.7x	1.0x
Ceramics	621	627	-6.08	-0.97%	5	28,699	0.4%	439.0	6.9%	43.3x	1.7x	BESTHLDNG	40,251	1.0%	152.1	30.5x	0.7x
Miscellaneous	4,507	4,524	-17.40	-0.38%	14	246,203	3.3%	137.1	2.1%	39.9x	1.9x	EBL	37,545	0.9%	23.7	6.6x	1.0x
Corporate Bond**	4,248	4,248	+0.30	+0.01%	13	42,604	0.6%	0.1	0.0%	NM	NM	POWERGRID	33,569	0.8%	2.4	NM	0.3x
Treasury Bond**	87	86	+0.21	+0.24%	241	3,296,027	44.1%	2.7	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ASIATICLAB	24.2	+10.0%	0.1	12.8x	0.5x
ICBIBANK	4.6	+7.0%	7.6	NM	NM
BEACONPHAR	248.8	+4.8%	132.8	87.0x	9.1x
GOLDENSON	19.1	+4.4%	159.2	NM	1.0x
FIRSTFIN	4.9	+4.3%	0.1	NM	NM
FINEFOODS	180.0	+3.9%	64.3	NM	16.7x
ILFSL	5.6	+3.7%	2.2	NM	NM
ATLASBANG	74.2	+2.6%	0.2	NM	0.6x
ANLIMAYARN	47.5	+2.6%	20.4	NM	4.6x
STANDBANKL	8.0	+2.6%	1.4	7.5x	0.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,789	7.1%	9.7x	1.6x
BATBC	74,086	4.3%	13.7x	4.6x
BEXIMCO	69,196	4.0%	NM	1.2x
RENATA	68,042	4.0%	50.1x	3.3x
BXPHERMA	45,564	2.7%	11.7x	1.3x
GP	38,700	2.3%	10.4x	5.1x
BEACONPHAR	34,036	2.0%	87.0x	9.1x
ISLAMIBANK	33,649	2.0%	8.5x	0.7x
BRACBANK	30,964	1.8%	9.0x	1.0x
LHBL	28,853	1.7%	14.3x	3.8x
NBL	19,116	1.1%	NM	0.8x
PUBALIBANK	18,457	1.1%	4.9x	0.7x
CITYBANK	18,190	1.1%	5.0x	0.7x
OLYMPIC	16,818	1.0%	18.1x	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%	5.4x	0.7x
UPGDCL	13,547	0.8%	13.5x	3.0x
SUMITPOWER	13,369	0.8%	12.1x	0.7x
ALARABANK	13,112	0.8%	12.6x	1.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGCER	30.6	+1.0%	409.4	NM	2.5x
CENTRALPHL	26.8	-9.5%	280.8	NM	4.9x
INTRACO	45.3	-0.9%	176.9	48.7x	3.8x
MONNOFABR	27.7	-8.9%	165.9	NM	1.1x
GOLDENSON	19.1	+4.4%	159.2	NM	1.0x
FORTUNE	54.6	-3.9%	155.8	52.3x	3.6x
AFTABAUTO	56.4	-6.0%	153.2	NM	1.1x
BESTHLDNG	38.0	-2.6%	152.1	30.5x	0.7x
BATBC	452.9	-3.6%	151.5	13.7x	4.6x
BDTHAI	27.2	-8.4%	133.9	NM	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CENTRALPHL	26.8	-9.5%	280.8	NM	4.9x
MONNOFABR	27.7	-8.9%	165.9	NM	1x
BDTHAI	27.2	-8.4%	133.9	NM	1.0x
KPPL	30.1	-8.2%	29.3	NM	NM
HEIDELCEM	245.3	-6.4%	37.6	30.2x	3.7x
SEMLLECMF	7.8	-6.0%	5.8	NM	0.9x
OAL	17.2	-6.0%	93.5	NM	1.6x
AFTABAUTO	56.4	-6.0%	153.2	NM	1.1x
ALLTEX	14.6	-5.8%	3.1	NM	2.9x
GSPFINANCE	15.1	-5.6%	24.0	NM	0.6x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
NTC	467.8	464.0	2.0	765	356.48
SONALIPAPR	620.0	570.0	2.0	71	43.17
GP	254.0	254.0	3.0	150	38.10
FINEFOODS	174.9	156.0	4.0	117	20.40
AIBL1STIMF	9.8	9.3	7.0	1,958	19.06
CENTRALINS	60.0	60.0	1.0	300	18.00
APSCLBOND	4,000.0	4,000.0	2.0	3	12.40
ISLAMICFIN	14.5	14.5	1.0	840	12.18
LINDEBD	1,240.0	1,167.0	2.0	8	9.86
AIL	93.5	93.5	2.0	100	9.35

\* 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
NTC	467.8	464.0	356.5	765	2
SONALIPAPR	620.0	570.0	43.2	71	2
GP	254.0	254.0	38.1	150	3
FINEFOODS	174.9	156.0	20.4	117	4
AIBL1STIMF	9.8	9.3	19.1	1,958	7
CENTRALINS	60.0	60.0	18.0	300	1
APSCLBOND	4,000.0	4,000.0	12.4	3	2
ISLAMICFIN	14.5	14.5	12.2	840	1
LINDEBD	1,240.0	1,167.0	9.9	8	2
AIL	93.5	93.5	9.4	100	2
KARNAPHULI	60.0	57.0	8.5	146	2
SQURPHARMA	215.8	215.8	8.5	39	1
SPCERAMICS	38.5	38.5	8.4	218	1
EGEN	40.5	40.5	7.9	195	2
ROBI	32.8	29.2	7.3	231	6
SUNLIFEINS	56.0	56.0	6.2	110	2
RDFOOD	34.5	34.5	6.2	178	1
NAVANAPHAR	101.5	101.5	6.1	60	1
RENATA	968.0	968.0	5.3	6	1
AFTABAUTO	56.0	56.0	3.7	66	2
SAIFPOWER	25.9	23.0	3.6	147	3
HRTEX	109.0	102.5	2.0	19	2
<b>Total</b>			<b>638.4</b>		<b>80</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
BDTHAIFOOD		0.0%	1%	Record Date	7-Mar-24
CRYSTALINS		7.0%	10%	Record Date	12-Mar-24
CITYGENINS		0.0%	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

#### Important DSE News

##### HEIDELBCEM

The Board of Directors has recommended 25.00% cash dividend for all shareholders for the year ended on 31-Dec-2023. Date of AGM: 08-May-2024, Time: 10:30 AM, Venue: Registered address i.e. Mouza: Tatki, Post Office: Jatramora, Union: Tarabow, Police Station: Rugponj, Dist: Narayanganj and also using a Digital Platform. Record Date: 02-Apr-2024. The Company has also reported EPS of Tk. 8.13 (solo), NAV per share of Tk. 67.20 (solo) and NOCFPS of Tk. 21.78 (solo) for the year ended on 31-Dec-2023 as against Tk. (4.13) (solo), Tk. 60.07 (solo) and Tk. 3.80 (solo) respectively for the same period of the previous year.

##### IFADAUTOS

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'IFAD Autos PLC.' instead of 'IFAD Autos Limited' with effect from March 10, 2024. Other things (except name) will remain unchanged.

##### EGEN

eGeneration Sourcing Ltd., a Corporate Director of the Company, has expressed its intention to sell 25,00,000 shares out of its holding of 40,14,082 shares of the Company at prevailing market price (In the Public/Block Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 working days.

##### EGEN

Ms. Syeda Kamrun Nahar Ahmed, a Director of the Company, has expressed her intention to sell 10,00,000 shares out of her total holding of 60,03,283 shares of the company at prevailing market price (in the Public/Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

##### EGEN

Mr. SM Ashraful Islam, Chairman (Nominated Director by eGeneration Sourcing Ltd.) of the Company, has expressed his intention to sell his entire holding of 2,82,080 shares of the company at prevailing market price (in the Public/Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

##### EXCH

During the month of "Holy Ramadan", DSE office hours & trading session are as follows- Office Hours: From 9:00 am to 3:30 pm. Trading Session: Continuous Session: From 10:00 am to 1:20 pm, Post-Closing Session: From 1:20 pm to 1:30 pm. The office hours & trading time of DSE, after the month of Ramadan and holidays of Eid-ul-Fitr, will revert to usual time schedule.

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