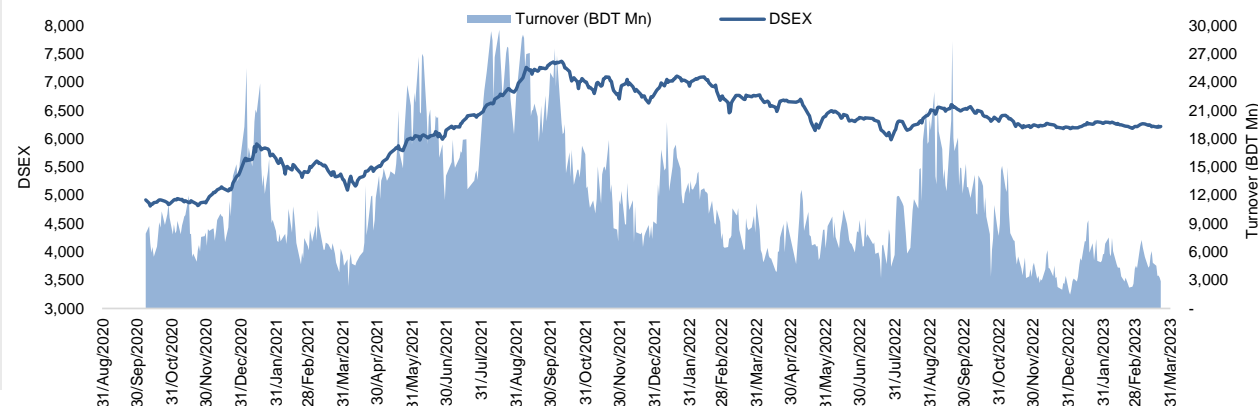


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.14%) gained 8.66 points and closed at 6,215.30. The blue-chip index DS30 (+0.12%), the Shariah-based index DSES (+0.06%), and the large-cap index CDSET (+0.01%) closed at 2,218.02, 1,353.25, and 1,215.34 points, respectively. Large-cap sectors posted mixed performance today. Fuel & Power booked the highest gain of 0.07% followed by Bank (+0.05%), NBFI (0.00%). Food & Allied experienced the highest loss of 0% followed by Pharmaceutical (0.00%), Engineering (0.00%). Block trades contributed 13.0% of the overall market turnover. Sea Pearl Beach Resort & Spa Limited (+4.2%) was the most traded share with a turnover of BDT 342 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,215.30	6,206.64	+8.66	+0.14%	+0.1%
DS30	2,218.02	2,215.43	+2.59	+0.12%	+1.0%
DSES	1,353.25	1,352.50	+0.75	+0.06%	-0.4%
CDSET	1,215.34	1,215.17	+0.17	+0.01%	+0.1%

	Advanced	Declined	Unchanged	Total
All Category	74	26	205	305
A Category (Equity)	45	23	142	210
B Category (Equity)	21	2	56	79
N Category (Equity)	2	0	2	4
Z Category (Equity)	6	1	5	12
Mutual Funds	0	0	17	17
Corporate Bonds	0	1	3	4
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,614,109	7,609,351	+0.1%
	Mn USD	71,494	71,449	
Turnover	Mn BDT	2,870	3,285	-12.6%
	Mn USD	27	31	
Volume	Mn Shares	44	47	-7.2%
No. of Trade		63,741	73,769	-13.6%

* Average Interbank Exchange Rate is BDT 106.50 as of Mar 22, 2023

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Figure: Sectorial Turnover (BDT Mn)

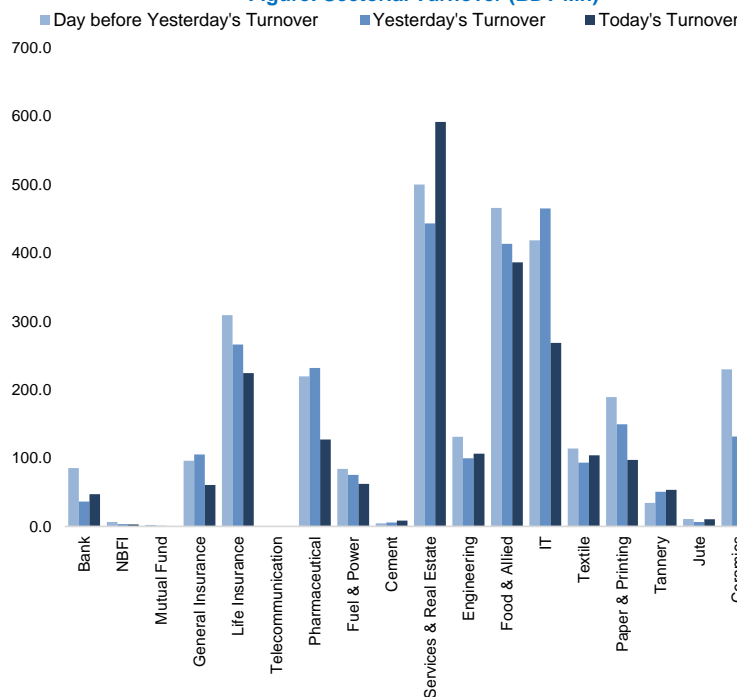
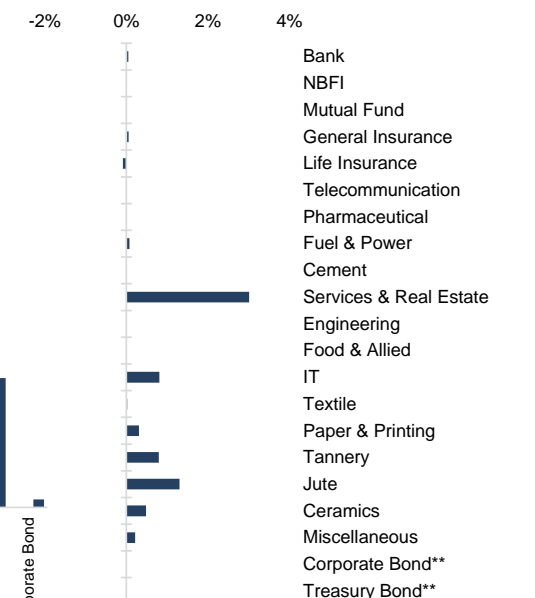


Figure: Sectorial Mcap Change



Market PE 18.4x
 Market PB 1.6x

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	1,432	+0.73	+0.05%	34	669,472	8.9%	47.3	1.9%	7.8x	0.7x	GP	386,996	8.6%	0.3	12.9x	8.4x
NBFI	1,917	1,917	-	-	23	186,974	2.5%	2.8	0.1%	NM	4.4x	WALTONHIL	317,378	7.1%	0.2	40.4x	4.8x
Mutual Fund	825	825	-	-	37	37,318	0.5%	0.1	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.1	15.7x	6.8x
General Insurance	3,052	3,050	+1.64	+0.05%	42	89,077	1.2%	60.5	2.4%	15.0x	1.4x	SQURPHARM/	185,977	4.1%	0.7	9.7x	1.8x
Life Insurance	2,544	2,546	-2.07	-0.08%	14	71,353	0.9%	224.2	9.0%	NM	NM	ROBI	157,138	3.5%	0.0	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.4	0.0%	16.8x	4.7x	RENATA	139,689	3.1%	0.1	31.1x	4.7x
Pharmaceutical	3,689	3,689	-0.11	-0.00%	34	715,519	9.5%	126.9	5.1%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,694	1,693	+1.24	+0.07%	23	446,949	5.9%	62.2	2.5%	17.9x	1.1x	BEXIMCO	103,571	2.3%	0.0	9.0x	1.2x
Cement	2,309	2,309	-	-	7	110,898	1.5%	8.3	0.3%	57.9x	2.6x	BERGERPBL	80,248	1.8%	2.9	27.2x	6.7x
Services & Real Esta	2,302	2,235	+67.39	+3.02%	8	90,964	1.2%	591.8	23.7%	38.7x	1.2x	MARICO	76,277	1.7%	0.0	20.7x	28.6x
Engineering	4,473	4,473	-0.13	-0.00%	42	525,028	7.0%	106.4	4.3%	56.1x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,727	21,728	-0.84	-0.00%	21	387,140	5.1%	386.4	15.5%	20.1x	8.1x	BXPHERMA	65,222	1.5%	0.2	14.1x	1.6x
IT	3,296	3,269	+26.60	+0.81%	11	42,969	0.6%	268.5	10.8%	31.3x	2.9x	BEACONPHAR	62,971	1.4%	13.5	67.1x	10.2x
Textile	1,578	1,578	+0.41	+0.03%	58	166,335	2.2%	104.0	4.2%	42.7x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,892	10,859	+33.61	+0.31%	6	41,966	0.6%	97.2	3.9%	41.4x	2.1x	ISLAMIBANK	53,452	1.2%	0.7	10.9x	0.8x
Tannery	3,105	3,080	+24.65	+0.80%	6	32,795	0.4%	53.6	2.1%	47.5x	3.1x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	12,580	12,418	+161.79	+1.30%	3	3,077	0.0%	10.5	0.4%	NM	4.8x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	694	691	+3.34	+0.48%	5	32,097	0.4%	145.2	5.8%	41.6x	1.9x	SEAPEARL	38,266	0.9%	342.3	76.9x	22.4x
Miscellaneous	4,086	4,077	+8.89	+0.22%	14	222,456	3.0%	189.2	7.6%	13.2x	1.8x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Corporate Bond**	88	88	-0.00	-0.00%	9	36,390	0.5%	11.6	0.5%	NM	NM	UNILEVERCL	37,248	0.8%	8.4	51.0x	22.1x
Treasury Bond**	95	95	+0.00	+0.00%	252	3,047,816	40.4%	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
LEGACYFOOT	56.2	+10.0%	28.2	NM	6.2x	SQURPHARMA	121,685	7.2%	9.7x	1.8x	SEAPEARL	316.9	+4.2%	342.3	76.9x	22.4x
SAMATALETH	59.0	+9.9%	7.2	NM	4.1x	BATBC	74,086	4.4%	15.7x	6.8x	EHL	102.8	+5.7%	167.2	16.1x	1.4x
HAKKANIPUL	55.4	+9.7%	23.6	NM	2.4x	BEXIMCO	71,930	4.3%	9.0x	1.2x	RDFOOD	44.6	+1.4%	145.3	38.7x	2.8x
ISNLTD	47.0	+6.3%	12.6	79.7x	13.9x	RENATA	68,196	4.0%	31.1x	4.7x	SPCERAMICS	46.3	+2.2%	131.5	85.7x	1.5x
GQBALLPEN	81.9	+5.7%	5.2	NM	0.7x	BXPHERMA	45,538	2.7%	14.1x	1.6x	BSC	128.4	+1.6%	127.6	8.6x	1.6x
EHL	102.8	+5.7%	167.2	16.1x	1.4x	BEACONPHAR	44,079	2.6%	67.1x	10.2x	RUPALILIFE	89.7	+0.8%	98.4	NM	NM
SINOBANGLA	55.1	+5.2%	40.9	30.2x	2x	GP	38,700	2.3%	12.9x	8.4x	AL-HAJTEX	184.4	+0.8%	82.1	NM	19.5x
BDWELDING	25.1	+5.0%	15.9	NM	2.2x	BRACBANK	30,976	1.8%	10.9x	1.0x	GENEXIL	93.7	+1.4%	74.6	28.3x	5.1x
IMAMBUTTON	87.9	+4.4%	2.8	NM	18.3x	LHBL	26,581	1.6%	16.9x	4.2x	FINEFOODS	72.9	+2.7%	69.7	NM	6.9x
SEAPEARL	316.9	+4.2%	342.3	76.9x	22.4x	ISLAMIBANK	24,010	1.4%	10.9x	0.8x	OLYMPIC	157.7	-0.6%	68.4	20.5x	3.3x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BENGALWTL	29.2	-1.7%	49.8	55.1x	1.1x	OLYMPIC	19,126	1.1%	20.5x	3.3x	SEAPEARL	301.7	278.0	16.0	403	115.18
ORIONINFU	265.1	-1.4%	37.4	NM	20x	NBL	19,116	1.1%	NM	0.6x	BDFINANCE	44.1	43.2	2.0	635	27.82
DELTALIFE	142.9	-1.2%	16.8	NM	NM	PUBALIBANK	18,596	1.1%	5.5x	0.6x	SQURPHARMA	206.9	205.9	16.0	93	19.20
JUTESPINN	256.9	-1.2%	0.2	NM	NM	CITYBANK	17,615	1.0%	4.5x	0.8x	ANWARGALV	213.0	213.0	1.0	75	15.98
OIMEX	16.3	-1.2%	1.2	NM	1.5x	ROBI	15,714	0.9%	85.7x	2.4x	NBL	8.2	8.1	14.0	1,824	14.86
RSRMSTEEL	16.3	-1.2%	1.1	NM	0.4x	ALARABANK	14,609	0.9%	14.6x	1.1x	BSCCL	218.9	199.8	9.0	65	13.69
UNIONINS	42.1	-1.2%	7.5	19.8x	2.4x	BSRMLTD	14,417	0.9%	NM	0.7x	AL-HAJTEX	179.0	172.0	10.0	71	12.37
HWAWELLTEX	47.2	-1.0%	0.2	NM	1.4x	PRIMEBANK	13,876	0.8%	6.5x	0.7x	RDFOOD	41.0	41.0	4.0	300	12.30
MERCANBANK	13.7	-0.7%	3.3	4.1x	0.6x	UPGDCL	13,547	0.8%	15.4x	4.7x	MARICO	2,421.5	2,421.5	1.0	5	11.79
ASIAPACINS	43.6	-0.7%	0.8	18.6x	1.9x						SAIFPOWER	28.9	28.9	1.0	350	10.12

* 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)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SEAPPEARL	301.7	278.0	115.2	403	16
BDFINANCE	44.1	43.2	27.8	635	2
SQURPHARMA	206.9	205.9	19.2	93	16
ANWARGALV	213.0	213.0	16.0	75	1
NBL	8.2	8.1	14.9	1,824	14
BSCCL	218.9	199.8	13.7	65	9
AL-HAJTEX	179.0	172.0	12.4	71	10
RDFOOD	41.0	41.0	12.3	300	4
MARICO	2,421.5	2,421.5	11.8	5	1
SAIFPOWER	28.9	28.9	10.1	350	1
BATBC	518.7	479.8	9.8	19	5
AIBLPBOND	4,999.0	4,999.0	9.6	2	1
BXPHARMA	141.9	139.0	8.9	63	7
GIB	9.0	9.0	8.5	943	2
GENNEXT	6.0	6.0	8.2	1,360	1
POWERGRID	47.2	47.2	7.8	166	10
ROBI	27.0	27.0	7.0	260	8
BEXIMCO	115.7	109.0	6.9	60	2
LHBL	64.0	63.7	5.2	82	9
BEACONPHAR	286.1	286.1	4.3	15	1
EBL	31.8	31.8	3.7	116	1
SINGERBD	136.8	136.8	3.6	26	4
Total			372.7		173

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
LHBL		0.0%	15%	Record Date	27-Mar-23
LINDEBD		0.0%	420%	Record Date	2-Apr-23
UNILEVERCL		60.0%	240%	Record Date	3-Apr-23
BDFINANCE		0.0%	10%	Record Date	4-Apr-23
BANKASIA		0.0%	15%	Record Date	6-Apr-23
SKICL		2.0%	12%	Record Date	9-Apr-23
UNITEDINS		0.0%	10%	Record Date	9-Apr-23
CENTRALINS		0.0%	15%	Record Date	16-Apr-23
PHENIXINS		0.0%	15%	Record Date	17-Apr-23

Important DSE News

GENNEXT

A.J Corporation Limited, a Corporate Director of the Company, has expressed its intention to buy 15,00,000 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange Limited within next 30 working days.

CNW

Midland Bank Limited (Q3): As per un-audited Q3 financial statements, profit after tax was BDT 93.69 million and basic EPS was BDT 0.16 for the 3 (three) months period July-September 2022 as against profit after tax of BDT 104.31 million and basic EPS of BDT 0.18 for the same period of the previous year. However, Post-IPO basic EPS for the 03 (three) months period July-September 2022 would be BDT 0.15. Moreover, profit after tax was BDT 189.20 million and basic EPS was BDT 0.33 for the 09 (nine) months period January-September 2022 as against profit after tax of BDT 454.78 million and basic EPS of BDT 0.80 for the same period of the previous year. However, Post-IPO EPS would be BDT 0.30 for the 09 (nine) months period January-September 2022. Pre-IPO Net Asset Value (NAV) per share (considering Pre-IPO paid up shares) would be BDT 12.79 as on 30 September 2022 and the same would be BDT 12.49 (considering Post-IPO paid up shares). Pre-IPO weighted average number of shares is 569,669,753 as on 30 September 2022, whereas Post-IPO paid-up number of shares would be 639,669,753 as on the same date.

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