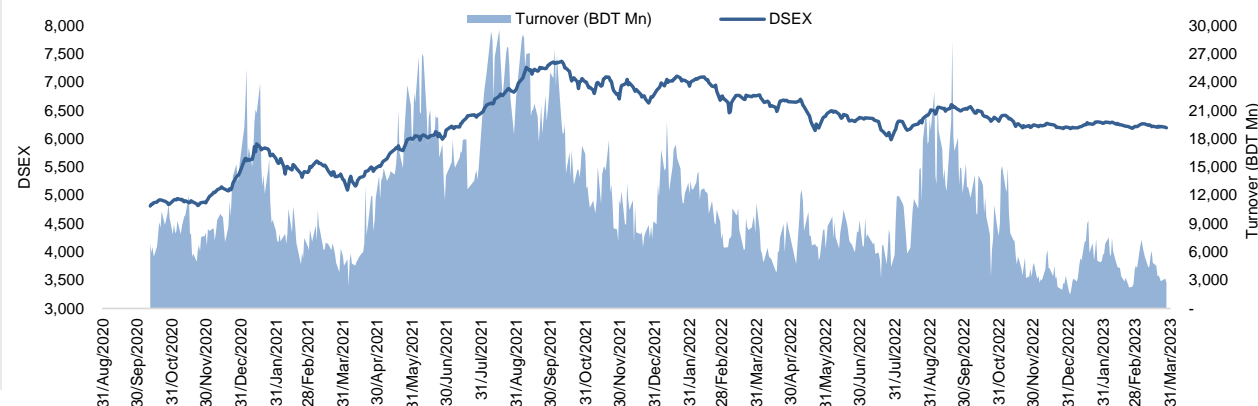


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.17%) lost 10.84 points and closed at 6,193.08. The blue-chip index DS30 (-0.21%), the Shariah-based index DSES (-0.30%), and the large-cap index CDSET (-0.22%) closed at 2,210.71, 1,345.62, and 1,210.73 points, respectively. All the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.26% followed by Bank (-0.18%), Food & Allied (-0.10%), Fuel & Power (-0.04%), Engineering (-0.01%), NBFI (0.00%), and Telecommunication (0.00%), respectively. Block trades contributed 11.3% of the overall market turnover. Eastern Housing Limited (+3.9%) was the most traded share with a turnover of BDT 204 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,193.08	6,203.92	-10.84	-0.17%	-0.2%
DS30	2,210.71	2,215.41	-4.70	-0.21%	+0.7%
DSES	1,345.62	1,349.69	-4.07	-0.30%	-1.0%
CDSET	1,210.73	1,213.46	-2.73	-0.22%	-0.3%

	Advanced	Declined	Unchanged	Total
All Category	29	60	203	292
A Category (Equity)	19	37	145	201
B Category (Equity)	8	15	49	72
N Category (Equity)	1	0	4	5
Z Category (Equity)	1	8	5	14
Mutual Funds	0	0	16	16
Corporate Bonds	0	0	0	0
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,618,960	7,614,177	+0.1%
	Mn USD	71,205	71,161	
Turnover	Mn BDT	2,721	3,176	-14.3%
	Mn USD	25	30	
Volume	Mn Shares	43	51	-15.8%
No. of Trade		68,014	79,586	-14.5%

\* Average Interbank Exchange Rate is BDT 107.00 as of Mar 27, 2023

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Figure: Sectorial Turnover (BDT Mn)

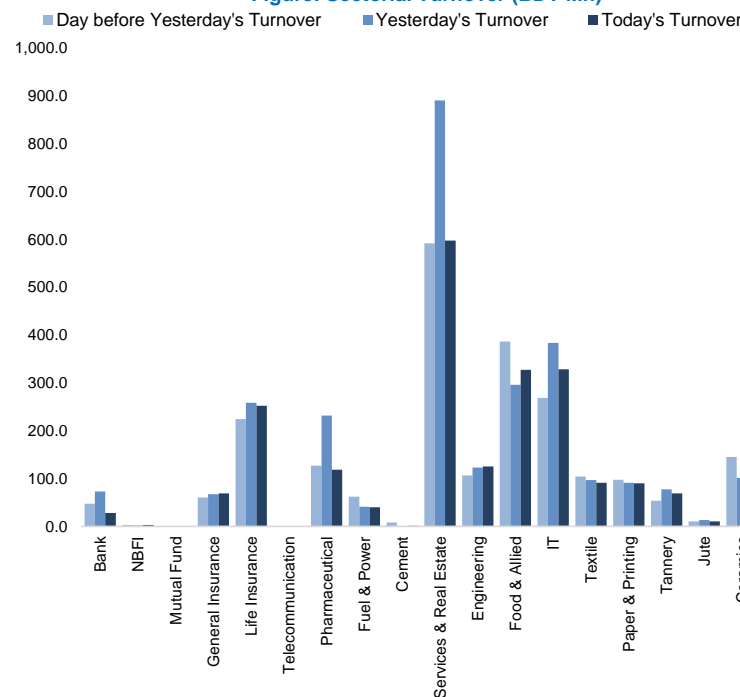
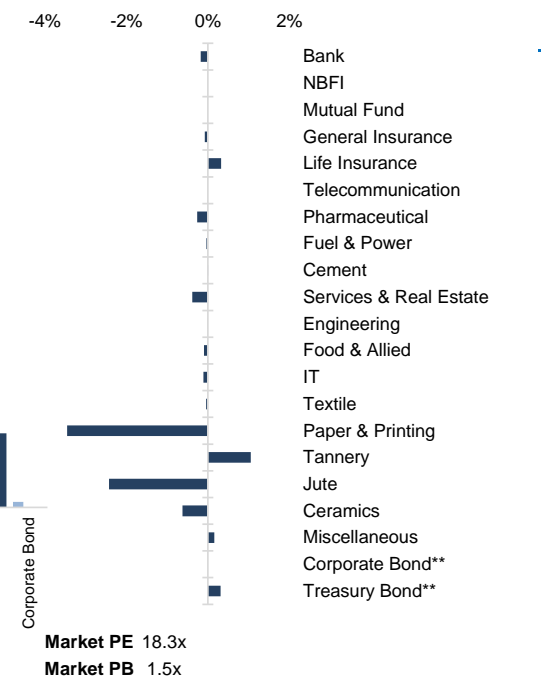


Figure: Sectorial Mcap Change



Market PE 18.3x

Market PB 1.5x

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	1,427	1,430	-2.54	-0.18%	34	666,817	8.8%	28.3	1.2%	7.7x	0.7x	GP	386,996	8.7%	0.2	12.9x	8.4x
NBFI	1,916	1,916	-	-	23	186,940	2.5%	3.1	0.1%	NM	4.4x	WALTONHIL	317,378	7.1%	0.0	40.4x	4.8x
Mutual Fund	825	825	-	-	37	37,318	0.5%	0.2	0.0%	NM	0.7x	BATBC	280,098	6.3%	0.1	15.7x	6.8x
General Insurance	3,037	3,039	-2.19	-0.07%	42	88,642	1.2%	69.0	2.9%	14.9x	1.4x	SQURPHARM/	185,977	4.2%	0.5	9.7x	1.8x
Life Insurance	2,553	2,545	+8.32	+0.33%	14	71,594	1.0%	252.3	10.5%	NM	NM	ROBI	157,138	3.5%	0.1	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.2	0.0%	16.8x	4.7x	RENATA	139,689	3.1%	0.0	31.1x	4.7x
Pharmaceutical	3,671	3,681	-9.61	-0.26%	34	712,139	9.5%	118.5	4.9%	18.4x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,693	1,694	-0.60	-0.04%	23	446,565	5.9%	40.2	1.7%	17.9x	1.1x	BEXIMCO	103,571	2.3%	0.0	9.0x	1.2x
Cement	2,309	2,309	+0.06	+0.00%	7	110,901	1.5%	1.2	0.1%	57.9x	2.6x	BERGERPBL	80,373	1.8%	6.2	27.2x	6.7x
Services & Real Esta	2,303	2,312	-8.77	-0.38%	8	90,982	1.2%	597.2	24.8%	38.7x	1.2x	MARICO	76,277	1.7%	0.1	20.7x	28.6x
Engineering	4,472	4,473	-0.64	-0.01%	42	524,870	7.0%	125.0	5.2%	56.1x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,686	21,707	-21.01	-0.10%	21	386,409	5.1%	327.0	13.6%	20.0x	8.1x	BXPHARMA	65,222	1.5%	0.5	14.1x	1.6x
IT	3,271	3,275	-3.47	-0.11%	11	42,648	0.6%	328.6	13.7%	31.1x	2.9x	BEACONPHAR	60,453	1.4%	12.1	64.5x	9.8x
Textile	1,577	1,578	-0.68	-0.04%	58	166,247	2.2%	91.1	3.8%	42.7x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,285	10,653	-367.79	-3.45%	6	39,629	0.5%	89.9	3.7%	39.1x	2.0x	ISLAMIBANK	53,130	1.2%	1.6	10.8x	0.8x
Tannery	3,114	3,082	+32.41	+1.05%	6	32,890	0.4%	68.8	2.9%	47.6x	3.2x	DUTCHBANGL	43,554	1.0%	0.2	7.4x	1.1x
Jute	12,338	12,644	-306.57	-2.42%	3	3,018	0.0%	10.3	0.4%	NM	4.7x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	688	692	-4.32	-0.62%	5	31,815	0.4%	98.9	4.1%	41.2x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,085	4,078	+6.44	+0.16%	14	222,410	3.0%	154.9	6.4%	13.2x	1.8x	UNILEVERCL	37,256	0.8%	9.0	51.0x	22.2x
Corporate Bond**	88	88	-	-	9	36,390	0.5%	0.0	0.0%	NM	NM	SEAPEARL	36,563	0.8%	182.2	73.5x	21.4x
Treasury Bond**	96	95	+0.30	+0.31%	252	3,056,434	40.6%	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	67.8	+9.7%	47.9	NM	7.5x	SQURPHARMA	121,499	7.1%	9.7x	1.8x	EHL	105.3	+3.9%	204.3	16.5x	1.4x
INTECH	25.0	+8.7%	13.4	NM	15.0x	BATBC	74,086	4.4%	15.7x	6.8x	UNIQUEHRL	72.3	-	199.0	16.1x	0.9x
NFML	15.6	+6.8%	35.8	97.3x	1.3x	BEXIMCO	69,196	4.1%	9.0x	1.2x	SEAPEARL	302.8	-1.8%	182.2	73.5x	21.4x
OIMEX	17.5	+4.8%	15.6	NM	1.6x	RENATA	68,042	4.0%	31.1x	4.7x	RDFOOD	44.0	+0.2%	121.7	38.2x	2.8x
BDAUTOCA	131.3	+4.5%	26.6	NM	18.2x	BEACONPHAR	48,413	2.8%	64.5x	9.8x	GENEXIL	91.6	-0.7%	121.0	27.7x	4.9x
EHL	105.3	+3.9%	204.3	16.5x	1.4x	BXPHARMA	45,564	2.7%	14.1x	1.6x	RUPALILIFE	93.4	+0.3%	96.9	NM	NM
PRIMELIFE	60.1	+3.6%	15.2	NM	NM	GP	38,700	2.3%	12.9x	8.4x	BSC	126.8	-0.8%	84.4	8.5x	1.6x
BANGAS	112.7	+2.9%	4.2	NM	5.4x	BRACBANK	30,976	1.8%	10.9x	1.0x	SPCERAMICS	45.0	-2.2%	79.5	83.3x	1.4x
BATASHOE	964.4	+2.3%	1.1	37.3x	3.6x	LHBL	26,980	1.6%	16.9x	4.2x	AL-HAJTEX	185.8	+0.1%	65.7	NM	19.6x
CLICL	66.0	+2.2%	38.7	NM	NM	ISLAMIBANK	24,166	1.4%	10.8x	0.8x	AAMRANET	59.6	-1.8%	63.3	18.7x	1.6x
Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB						Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
JUTESPINN	246.3	-5.9%	0.8	NM	NM	PUBALIBANK	18,525	1.1%	5.5x	0.6x	SEAPEARL	309.0	281.6	3.0	184	51.99
HAKKANIPUL	53.2	-5.2%	14.9	NM	2x	CITYBANK	18,211	1.1%	4.5x	0.8x	BDFINANCE	44.1	44.1	1.0	900	39.69
SONALIPAPR	631.1	-5.0%	25.3	67.5x	3.7x	SEAPEARL	18,067	1.1%	73.5x	21.4x	AL-HAJTEX	190.0	170.0	17.0	148	26.70
GQBALLPEN	79.6	-4.6%	2.0	NM	0.7x	OLYMPIC	17,642	1.0%	20.2x	3.3x	SQURPHARMA	205.8	203.7	25.0	122	24.91
BENGALWTL	28.1	-3.8%	37.7	53.0x	1.1x	ROBI	15,714	0.9%	85.7x	2.4x	SALVOCHEM	61.9	61.7	3.0	345	21.32
PRIMEBANK	19.2	-3.5%	1.7	6.3x	0.7x	ALARABANK	14,483	0.9%	14.6x	1.1x	BXPHARMA	145.0	141.0	6.0	85	12.31
ZEALBANGLA	141.0	-3.4%	0.3	NM	NM	BSRMLTD	14,210	0.8%	NM	0.7x	LHBL	64.0	63.0	13.0	169	10.76
SHYAMPSUG	91.9	-3.3%	1.1	NM	NM	PRIMEBANK	13,766	0.8%	6.3x	0.7x	AOL	32.9	32.9	1.0	316	10.41
SINOBANGLA	53.7	-3.1%	20.9	29.5x	1.9x	UPGDCL	13,547	0.8%	15.4x	4.7x	BEXIMCO	119.9	104.1	8.0	84	9.14
IMAMBUTTON	87.5	-2.9%	4.4	NM	18.2x						NBL	8.3	8.2	2.0	1,085	9.00

\* 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

\* 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
SEAPEARL	309.0	281.6	52.0	184	3
BDFINANCE	44.1	44.1	39.7	900	1
AL-HAJTEX	190.0	170.0	26.7	148	17
SQURPHARMA	205.8	203.7	24.9	122	25
SALVOCHEM	61.9	61.7	21.3	345	3
BXPHARMA	145.0	141.0	12.3	85	6
LHBL	64.0	63.0	10.8	169	13
AOL	32.9	32.9	10.4	316	1
BEXIMCO	119.9	104.1	9.1	84	8
NBL	8.3	8.2	9.0	1,085	2
MARICO	2,360.0	2,346.0	8.2	4	7
RUPALILIFE	85.0	85.0	8.2	97	1
GENEXIL	99.0	90.0	7.3	80	3
SILVAPHL	21.6	19.5	6.4	301	2
RENATA	1,217.8	1,141.8	6.1	5	7
GSPFINANCE	30.1	27.5	6.0	212	3
SPCERAMICS	48.3	43.0	5.8	123	2
ROBI	27.0	27.0	3.4	125	3
LINDEBD	1,311.0	1,310.4	2.9	2	5
BATBC	479.9	479.8	2.9	6	3
QUASEMIND	53.0	53.0	2.8	52	2
MONNOFABR	21.9	21.9	2.7	125	1
<b>Total</b>			<b>307.2</b>		<b>149</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
UNITEDFIN		0.0%	5%	Record Date	16-Apr-23
PHENIXINS		0.0%	15%	Record Date	17-Apr-23
PRIMELIFE		0.0%	2%	Record Date	17-Apr-23
PIONEERINS		5.0%	25%	Record Date	27-Apr-23

#### Important DSE News

##### PIONEERINS

The Board of Directors has recommended 25% Cash and 5% stock dividend for the year ended December 31, 2022. Date of AGM: 31.05.2023, Time: 11:00 AM, Venue: Digital Platform. Record Date: 27.04.2023. The Company has also reported EPS (after tax) of Tk. 6.09, NAV per share of Tk. 46.88 and NOCFPS of Tk. 7.57 for the year ended December 31, 2022 as against Tk. 6.93 (restated), Tk. 44.23 (restated) and Tk. 7.86 (restated) respectively for the year ended December 31, 2021.

##### UNIQUEHRL

Refer to their earlier news disseminated by DSE regarding agreement with Nebras Power Investment Management BV on 18.04.2021 and 1st closure of the SPA and credit of the consideration value on 07.03.2022, the company has further informed that pursuant to the Schedule 1 of the SPA agreement, the company has completed the CPs of the Second & Third closing and subsequently, Nebras Power Investment Management B.V has remitted the Second & Third Closing money of USD 10,911,587.49 to the bank account of Unique Hotel & Resorts PLC on 27 March 2023 as consideration value (face value + premium + RJSC Stamp Duty). The remaining value of the 4th closing will be received upon satisfaction of the CPs as per agreement terms & conditions.

##### HAKKANIPUL

Hosne Ara Begum, one of the Sponsor Directors of the company, has expressed her intention to sell 50,000 shares out of her holdings 10,91,666 shares of the Company at prevailing market price (In the Block Market) through Chittagong Stock Exchange (CSE) within next 30 working days.

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