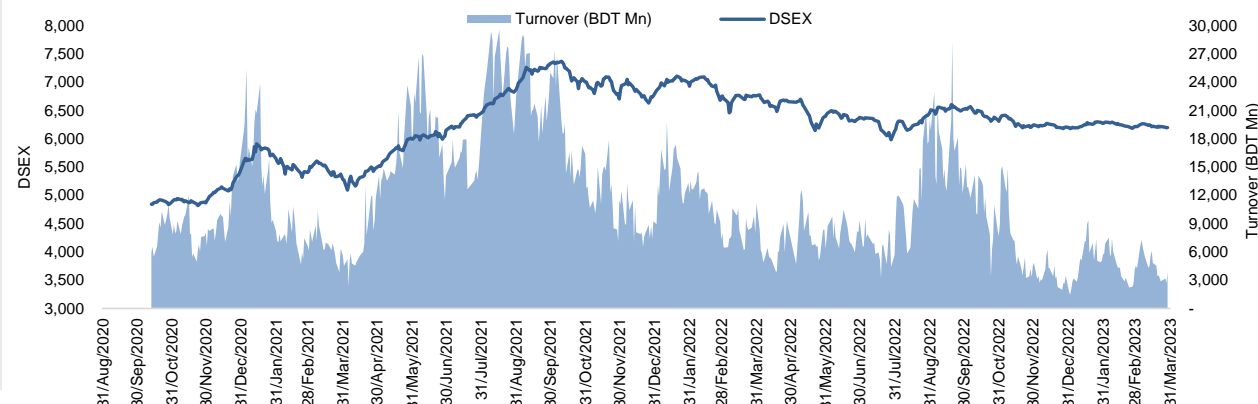


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.06%) gained 3.67 points and closed at 6,196.75. The blue-chip index DS30 (-0.17%), the Shariah-based index DSES (+0.15%), and the large-cap index CDSET (-0.09%) closed at 2,206.99, 1,347.68, and 1,209.61 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.04% followed by Fuel & Power (+0.04%), Engineering (+0.03%). Bank experienced the highest loss of 0.08% followed by Pharmaceutical (-0.07%), NBFI (0.00%). Block trades contributed 9.8% of the overall market turnover. Eastern Housing Limited (-0.4%) was the most traded share with a turnover of BDT 268 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,196.75	6,193.08	+3.67	+0.06%	-0.2%
DS30	2,206.99	2,210.71	-3.72	-0.17%	+0.5%
DSES	1,347.68	1,345.62	+2.06	+0.15%	-0.8%
CDSET	1,209.61	1,210.73	-1.12	-0.09%	-0.4%

	Advanced	Declined	Unchanged	Total
All Category	80	27	200	307
A Category (Equity)	48	20	135	203
B Category (Equity)	27	2	55	84
N Category (Equity)	1	1	3	5
Z Category (Equity)	4	4	7	15
Mutual Funds	0	0	13	13
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,618,301	7,618,960	-0.0%
	Mn USD	71,199	71,205	
Turnover	Mn BDT	3,827	2,721	+40.7%
	Mn USD	36	25	
Volume	Mn Shares	57	43	+34.2%
No. of Trade		85,395	68,014	+25.6%

* Average Interbank Exchange Rate is BDT 107.00 as of Mar 28, 2023

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Figure: Sectorial Turnover (BDT Mn)

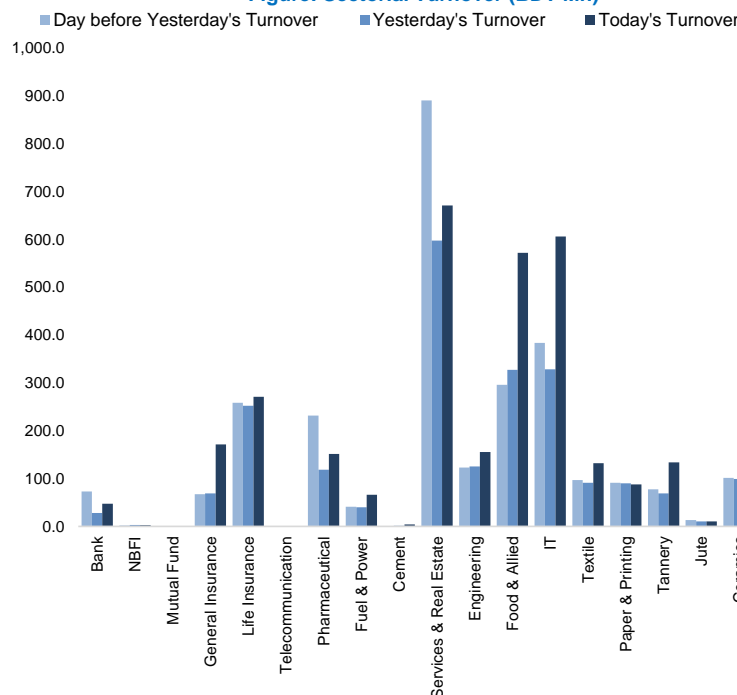
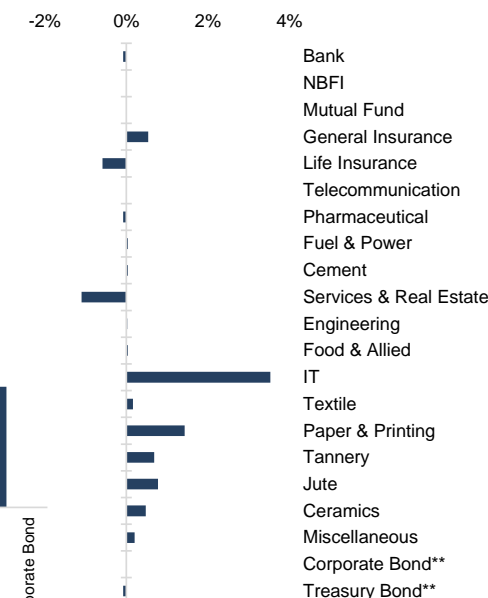


Figure: Sectorial Mcap Change



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	1,426	1,427	-1.13	-0.08%	35	672,808	8.9%	47.6	1.4%	7.8x	0.7x	GP	386,996	8.6%	0.0	12.9x	8.4x
NBFI	1,916	1,916	-	-	23	186,940	2.5%	2.2	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%	0.3	0.0%	NM	0.7x	BATBC	280,098	6.2%	0.4	15.7x	6.8x
General Insurance	3,053	3,037	+16.33	+0.54%	42	89,118	1.2%	171.1	5.0%	15.0x	1.4x	SQURPHARM/	185,977	4.1%	0.8	9.7x	1.8x
Life Insurance	2,538	2,553	-14.97	-0.59%	14	71,174	0.9%	270.6	7.8%	NM	NM	ROBI	157,138	3.5%	0.0	85.7x	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	0.1	0.0%	16.8x	4.7x	RENATA	139,689	3.1%	0.1	31.1x	4.7x
Pharmaceutical	3,668	3,671	-2.71	-0.07%	34	711,614	9.4%	151.2	4.4%	18.4x	2.4x	UPGDCL	135,475	3.0%	0.0	15.4x	4.7x
Fuel & Power	1,694	1,693	+0.62	+0.04%	23	446,729	5.9%	66.3	1.9%	17.9x	1.1x	BEXIMCO	103,571	2.3%	0.0	9.0x	1.2x
Cement	2,310	2,309	+0.89	+0.04%	7	110,943	1.5%	4.0	0.1%	57.9x	2.6x	BERGERPBL	80,354	1.8%	3.3	27.2x	6.7x
Services & Real Esta	2,278	2,303	-25.21	-1.09%	8	89,985	1.2%	670.8	19.4%	38.2x	1.2x	MARICO	76,277	1.7%	0.2	20.7x	28.6x
Engineering	4,473	4,472	+1.16	+0.03%	42	525,006	7.0%	155.2	4.5%	56.1x	2.1x	ICB	74,119	1.7%	0.0	NM	1.7x
Food & Allied	21,694	21,686	+7.95	+0.04%	21	386,550	5.1%	571.6	16.6%	20.0x	8.1x	BXPHARMA	65,222	1.5%	0.1	14.1x	1.6x
IT	3,387	3,271	+115.54	+3.53%	11	44,154	0.6%	605.6	17.5%	32.2x	3.0x	BEACONPHAR	59,852	1.3%	13.9	63.8x	9.7x
Textile	1,580	1,577	+2.58	+0.16%	58	166,519	2.2%	132.0	3.8%	44.4x	1.1x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,433	10,285	+147.12	+1.43%	6	40,196	0.5%	87.7	2.5%	39.7x	2.0x	ISLAMIBANK	52,969	1.2%	2.5	10.8x	0.8x
Tannery	3,135	3,114	+21.33	+0.68%	6	33,115	0.4%	133.7	3.9%	47.9x	3.2x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	12,433	12,338	+95.61	+0.77%	3	3,042	0.0%	10.2	0.3%	NM	4.8x	TITASGAS	40,459	0.9%	0.0	13.2x	0.5x
Ceramics	691	688	+3.29	+0.48%	5	31,968	0.4%	120.6	3.5%	41.4x	1.9x	POWERGRID	37,347	0.8%	0.0	NM	0.4x
Miscellaneous	4,093	4,085	+8.18	+0.20%	14	222,855	3.0%	252.4	7.3%	13.2x	1.8x	UNILEVERCL	37,290	0.8%	12.1	51.0x	22.2x
Corporate Bond**	88	88	-	-	9	36,390	0.5%	0.0	0.0%	NM	NM	SUMITPOWER	36,308	0.8%	0.0	10.7x	0.9x
Treasury Bond**	96	96	-0.07	-0.08%	252	3,054,116	40.5%	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
INTECH	27.5	+10.0%	14.3	NM	16.5x	SQURPHARMA	121,499	7.1%	9.7x	1.8x	EHL	104.9	-0.4%	268.1	16.5x	1.4x
SAMATALETH	69.3	+10.0%	11.1	NM	4.8x	BATBC	74,086	4.3%	15.7x	6.8x	UNIQUEHRL	72.4	+0.1%	216.7	16.1x	0.9x
HAKKANIPUL	58.5	+10.0%	18.8	NM	2.6x	BEXIMCO	69,196	4.1%	9.0x	1.2x	ADNTEL	164.7	+6.8%	212.8	48.9x	5.8x
ISNLTD	50.8	+10.0%	20.5	86.1x	15.0x	RENATA	68,042	4.0%	31.1x	4.7x	GEMINISEA	485.7	+6.3%	166.2	34.6x	28.3x
LEGACYFOOT	74.5	+9.9%	80.7	NM	8.2x	BEACONPHAR	48,413	2.8%	63.8x	9.7x	GENEXIL	93.8	+2.4%	158.2	28.4x	5.1x
SINOBANGLA	59.0	+9.9%	60.5	32.4x	2.1x	BXPHARMA	45,564	2.7%	14.1x	1.6x	RDFOOD	44.7	+1.6%	156.1	38.8x	2.8x
MIRACLEIND	26.8	+9.8%	22.6	NM	1x	GP	38,700	2.3%	12.9x	8.4x	SEAPEARL	293.5	-3.1%	152.1	71.2x	20.7x
GQBALLPEN	87.2	+9.5%	8.0	NM	0.7x	BRACBANK	30,976	1.8%	10.9x	1.0x	BSC	127.8	+0.8%	131.9	8.6x	1.6x
SAMORITA	71.9	+8.4%	12.9	NM	1.5x	LHBL	26,980	1.6%	16.9x	4.2x	RUPALILIFE	90.7	-2.9%	116.3	NM	NM
APEXTANRY	107.9	+8.2%	7.6	NM	1.8x	ISLAMIBANK	24,166	1.4%	10.8x	0.8x	SPCERAMICS	45.5	+1.1%	97.4	84.3x	1.5x
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)
MEGHNALIFE	73.2	-3.8%	70.2	NM	NM	PUBALIBANK	18,525	1.1%	5.4x	0.6x	IPDC	58.0	56.0	6.0	1,440	82.52
SEAPEARL	293.5	-3.1%	152.1	71.2x	21x	CITYBANK	18,211	1.1%	4.5x	0.8x	GEMINISEA	496.0	470.0	6.0	151	71.27
RUPALILIFE	90.7	-2.9%	116.3	NM	NM	SEAPEARL	18,067	1.1%	71.2x	20.7x	SQURPHARMA	209.8	203.0	44.0	265	53.75
SHYAMPSUG	89.6	-2.5%	3.2	NM	NM	OLYMPIC	17,642	1.0%	20.0x	3.2x	AL-HAJTEX	186.5	176.5	19.0	266	47.27
UNIONINS	40.2	-2.0%	17.0	18.9x	2.3x	ROBI	15,714	0.9%	85.7x	2.4x	ANWARGALV	211.0	204.9	2.0	80	16.79
ONEBANKLTD	10.1	-1.9%	2.8	23.9x	0.5x	ALARABANK	14,483	0.9%	14.6x	1.1x	AAMRANET	65.1	62.5	2.0	169	10.63
ZEALBANGLA	138.3	-1.9%	1.0	NM	NM	BSRMLTD	14,210	0.8%	NM	0.7x	GENEXIL	92.1	92.1	2.0	90	8.29
SONALILIFE	63.8	-1.7%	14.2	NM	NM	PRIMEBANK	13,766	0.8%	6.3x	0.7x	FINEFOODS	71.0	70.0	2.0	115	8.09
POPULARLIF	67.7	-1.6%	3.3	NM	NM	UPGDCL	13,547	0.8%	15.4x	4.7x	QUASEMIND	55.0	55.0	3.0	134	7.36
CLICL	65.0	-1.5%	21.5	NM	NM						POWERGRID	47.2	47.2	5.0	128	6.04

* 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
IPDC	58.0	56.0	82.5	1,440	6
GEMINISEA	496.0	470.0	71.3	151	6
SQURPHARMA	209.8	203.0	53.7	265	44
AL-HAJTEX	186.5	176.5	47.3	266	19
ANWARGALV	211.0	204.9	16.8	80	2
AAMRANET	65.1	62.5	10.6	169	2
GENEXIL	92.1	92.1	8.3	90	2
FINEFOODS	71.0	70.0	8.1	115	2
QUASEMIND	55.0	55.0	7.4	134	3
POWERGRID	47.2	47.2	6.0	128	5
RENATA	1,217.9	1,217.9	5.0	4	5
PDL	9.9	9.9	4.2	428	1
ADNTEL	154.4	147.0	4.1	27	3
SPCERAMICS	46.0	43.0	3.6	80	2
BSCCL	231.6	199.8	3.2	16	4
LRBDL	31.6	31.6	3.2	100	1
MARICO	2,345.0	2,340.0	3.1	1	4
LHBL	62.5	61.6	2.9	47	5
BEXIMCO	112.7	112.7	2.7	24	1
LINDEBD	1,312.1	1,310.5	2.6	2	4
SINGERBD	136.8	136.8	2.1	15	3
MPETROLEUM	198.5	198.5	2.0	10	1
Total			373.7		154

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
DBH		2.0%	15%	Record Date	18-Apr-23
PIONEERINS		5.0%	25%	Record Date	27-Apr-23
ICBIBANK		0.0%	0%	Record Date	11-May-23

Important DSE News
ICBIBANK

The Board of Directors has recommended No Dividend for the year ended December 31, 2022. Date of AGM: 13.07.2023, Time: 10:30 AM, Venue: Digital Platform. Record Date: 11.05.2023. The Company has also reported EPS of Tk. (0.38), NAV per share of Tk. (18.51) and NOCFPS of Tk. (0.88) for the year ended December 31, 2022 as against Tk. (0.59), Tk. (18.13) and Tk. 0.44 respectively for the year ended December 31, 2021.

DBH

The Board of Directors has recommended 15% cash and 2% stock dividend for the year ended December 31, 2022. Date of AGM: 18.05.2023, Time: 11:30 AM, Venue: Digital Platform, Record date: 18.04.2023. The Company has reported EPS of Tk. 5.21, NAV per share of Tk. 41.00 and NOCFPS of Tk. (19.64) for the year ended December 31, 2022 as against Tk. 5.35, Tk. 37.15 and Tk. (0.04) respectively for the year ended December 31, 2021.

RINGSHINE

(Q1 Un-audited): EPS was Tk. (0.37) for July-September 2022 as against Tk. (0.35) for July-September 2021. NOCFPS was Tk. 0.15 for July-September 2022 as against Tk. (0.21) for July-September 2021. NAV per share was Tk. (2.84) as on September 30, 2022 and Tk. (2.50) as on June 30, 2022.

(Q2 Un-audited): EPS was Tk. (0.38) for October-December 2022 as against Tk. 0.01 for October-December 2021; EPS was Tk. (0.76) for July-December 2022 as against Tk. (0.34) for July-December 2021. NOCFPS was Tk. 0.30 for July-December 2022 as against Tk. (0.70) for July-December 2021. NAV per share was Tk. (3.23) as on December 31, 2022 and Tk. (2.50) as on June 30, 2022.

LHBL

The company has informed that Ms. Naheed Akhter has resigned from her position of Director of the company with effect from March 28, 2023.

BDTHAI

The company has informed that Mr. Mashi Ud Duza resigned from the position of Managing Director of the Company with effect from March 15, 2023 and the Board approved his resignation. The Board appointed Mr. Md. Joynal Abedin FCA, as Managing Director (Acting) of the Company with effect from March 15, 2023.

TAMIJTEX

The Company has informed that the authorized capital has been increased from BDT 35,00,00,000.00 (Thirty Five Crore) to BDT 100,00,00,000.00 (One Hundred Crore) which has been approved by Registrar of Joint Stock Companies & Firms (RJSC).

GEMINISEA

Kazi Shahid Ahmed, one of the Sponsors of the company, has expressed his intention to sell 1,22,000 shares out of his holding of 7,93,674 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange Ltd. (DSE) within next 30 working days.

Mrs. Ameenah Ahmed, one of the Sponsor Directors of the Company, has expressed her intention to sell 1,00,000 shares out of her holding of 7,72,051 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange Limited (DSE) within next 30 working days.

UNITEDFIN

The company has informed that Mr. Mahub Mustafizur Rahman has resigned from his position of Independent Director of the company with immediate effect.

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