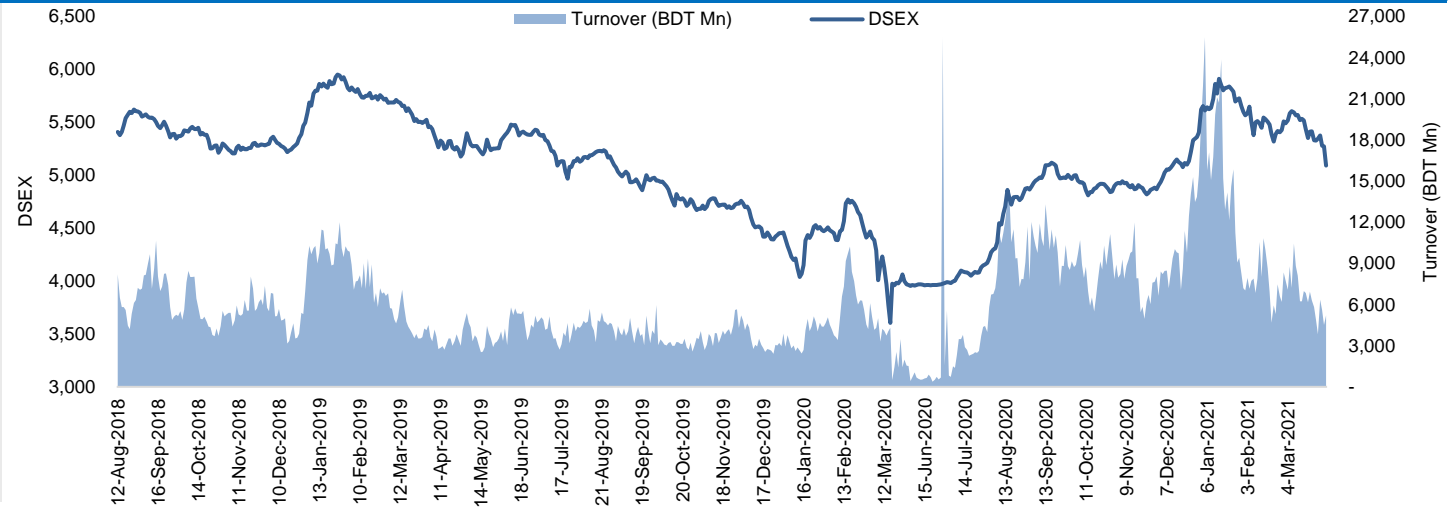


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-3.44%) lost 181.54 points and closed at 5,088.99. The blue-chip index DS30 (-4.14%), the Shariah-based index DSES (-3.02%), and the large-cap index CDSET (-3.82%) closed at 1,901.13, 1,166.17, and 1,079.61 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 6.30% followed by Engineering (-5.57%), Telecommunication (-4.67%), Fuel & Power (-3.15%), Pharmaceutical (-2.85%), Bank (-2.64%), and Food & Allied (-1.47%), respectively. Block trades contributed 6.1% of the overall market turnover. Bangladesh Export Import Company Ltd. (-8.8%) was the most traded share with a turnover of BDT 701 million.



| Index | Closing  | Opening  | Point Δ | %Δ     | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX  | 5,088.99 | 5,270.53 | -181.54 | -3.44% | -5.8%  |
| DS30  | 1,901.13 | 1,983.30 | -82.17  | -4.14% | -3.2%  |
| DSES  | 1,166.17 | 1,202.54 | -36.37  | -3.02% | -6.1%  |
| CDSET | 1,079.61 | 1,122.50 | -42.89  | -3.82% | -3.9%  |

|                     | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category        | 8        | 251      | 67        | 326   |
| A Category (Equity) | 5        | 183      | 50        | 238   |
| B Category (Equity) | 1        | 35       | 15        | 51    |
| N Category (Equity) | 1        | 9        | 0         | 10    |
| Z Category (Equity) | 1        | 24       | 2         | 27    |
| Mutual Funds        | 0        | 34       | 3         | 37    |
| Corporate Bonds     | 1        | 0        | 1         | 2     |

|              |           | Today     | Last Day  | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap         | Mn BDT    | 4,433,458 | 4,586,805 | -3.3%    |
|              | Mn USD    | 52,183    | 53,988    |          |
| Turnover     | Mn BDT    | 5,212     | 4,513     | +15.5%   |
|              | Mn USD    | 61        | 53        |          |
| Volume       | Mn Shares | 168       | 141       | +19.3%   |
| No. of Trade |           | 121,536   | 107,388   | +13.2%   |

Figure: Sectorial Turnover (BDT Mn)

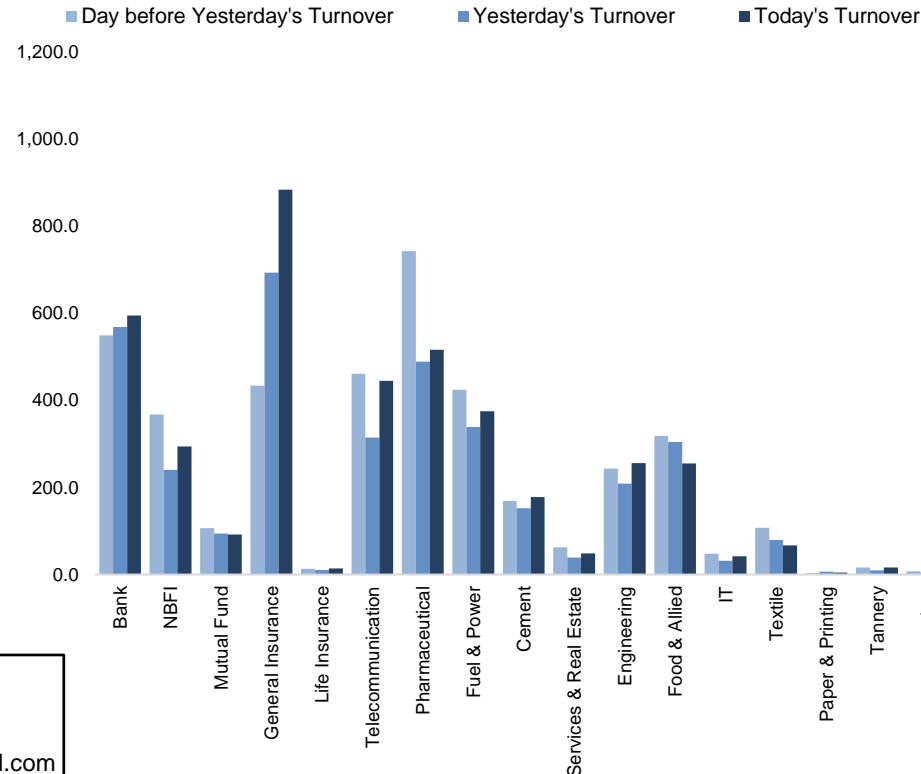
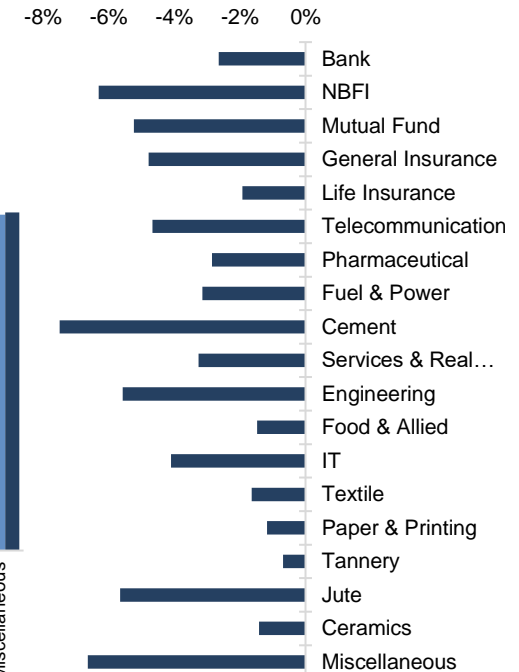


Figure: Sectorial Mcap Change



Market PE 17.6x  
Market PB 1.7x

|   |   |
|---|---|
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|---|---|

| 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                   | 1,256   | 1,290   | -34.08   | -2.64% | 31               | 542,567       | 14.1%           | 594.5             | 12.1%               | 7.1x  | 0.7x  | GP                    | 430,881       | 11.2%           | 87.2              | 12.1x | 10.2x |
| NBFI                   | 1,592   | 1,699   | -106.98  | -6.30% | 23               | 156,364       | 4.1%            | 293.6             | 6.0%                | 46.9x | 2.6x  | WALTONHIL             | 343,188       | 8.9%            | 47.4              | 44.9x | 6.5x  |
| Mutual Fund            | 761     | 803     | -42.03   | -5.23% | 37               | 34,342        | 0.9%            | 92.0              | 1.9%                | NM    | 0.7x  | BATBC                 | 282,798       | 7.3%            | 108.5             | 26.0x | 2.8x  |
| General Insurance      | 3,137   | 3,294   | -157.41  | -4.78% | 38               | 81,133        | 2.1%            | 882.9             | 18.0%               | 16.4x | 1.6x  | ROBI                  | 212,136       | 5.5%            | 306.5             | NM    | 3.2x  |
| Life Insurance         | 1,929   | 1,966   | -37.74   | -1.92% | 12               | 52,724        | 1.4%            | 13.6              | 0.3%                | NM    | NM    | SQURPHARMA            | 170,996       | 4.4%            | 85.7              | 12.0x | 2.1x  |
| Telecommunication      | 5,681   | 5,959   | -278.21  | -4.67% | 3                | 667,423       | 17.3%           | 444.4             | 9.1%                | 18.1x | 5.8x  | UPGDCL                | 147,359       | 3.8%            | 22.4              | 18.2x | 5.3x  |
| Pharmaceutical         | 3,125   | 3,216   | -91.80   | -2.85% | 31               | 569,300       | 14.8%           | 515.5             | 10.5%               | 20.1x | 2.4x  | RENATA                | 112,124       | 2.9%            | 25.0              | 25.3x | 4.9x  |
| Fuel & Power           | 1,567   | 1,618   | -50.88   | -3.15% | 22               | 419,051       | 10.9%           | 374.6             | 7.7%                | 12.3x | 1.3x  | BXPHARMA              | 77,624        | 2.0%            | 208.3             | 19.4x | 2.2x  |
| Cement                 | 1,425   | 1,541   | -115.41  | -7.49% | 7                | 83,685        | 2.2%            | 177.5             | 3.6%                | 22.4x | 2.0x  | BERGERPBL             | 76,820        | 2.0%            | 34.4              | 31.1x | 7.9x  |
| Services & Real Estate | 1,021   | 1,055   | -34.44   | -3.26% | 8                | 39,662        | 1.0%            | 48.3              | 1.0%                | NM    | 0.8x  | ICB                   | 65,190        | 1.7%            | 5.1               | 24.1x | 1.5x  |
| Engineering            | 4,079   | 4,320   | -240.53  | -5.57% | 42               | 497,950       | 12.9%           | 255.8             | 5.2%                | 31.1x | 2.4x  | MARICO                | 64,288        | 1.7%            | 23.0              | 21.4x | 38.3x |
| Food & Allied          | 20,380  | 20,685  | -304.87  | -1.47% | 20               | 368,753       | 9.6%            | 254.7             | 5.2%                | 33.5x | 3.3x  | BEXIMCO               | 60,028        | 1.6%            | 701.5             | NM    | 1.0x  |
| IT                     | 1,968   | 2,052   | -84.18   | -4.10% | 11               | 23,364        | 0.6%            | 41.6              | 0.8%                | 23.3x | 1.7x  | LHBL                  | 50,984        | 1.3%            | 138.3             | 21.6x | 2.9x  |
| Textile                | 979     | 995     | -16.31   | -1.64% | 56               | 102,166       | 2.7%            | 66.9              | 1.4%                | NM    | 0.7x  | BRACBANK              | 50,516        | 1.3%            | 17.1              | 11.9x | 1.1x  |
| Paper & Printing       | 5,191   | 5,253   | -61.70   | -1.17% | 4                | 14,622        | 0.4%            | 4.7               | 0.1%                | 58.0x | 1.0x  | ISLAMIBANK            | 45,080        | 1.2%            | 39.2              | 8.0x  | 0.7x  |
| Tannery                | 1,649   | 1,661   | -11.35   | -0.68% | 6                | 17,997        | 0.5%            | 16.2              | 0.3%                | NM    | 1.7x  | SUMITPOWER            | 43,783        | 1.1%            | 107.4             | 8.0x  | 1.3x  |
| Jute                   | 8,073   | 8,556   | -483.35  | -5.65% | 3                | 1,991         | 0.1%            | 6.2               | 0.1%                | NM    | 12.8x | OLYMPIC               | 31,830        | 0.8%            | 3.9               | 15.5x | 3.8x  |
| Ceramics               | 436     | 443     | -6.25    | -1.41% | 5                | 22,147        | 0.6%            | 36.0              | 0.7%                | 56.2x | 1.5x  | UNILEVERCL            | 31,476        | 0.8%            | 6.1               | 59.5x | 21.2x |
| Miscellaneous          | 3,215   | 3,443   | -228.28  | -6.63% | 13               | 158,847       | 4.1%            | 776.1             | 15.9%               | 48.4x | 1.7x  | DUTCHBANGL            | 31,295        | 0.8%            | 0.6               | 5.7x  | 1.0x  |
|                        |         |         |          |        |                  |               |                 |                   |                     |       |       | TITASGAS              | 30,765        | 0.8%            | 7.1               | 9.0x  | 0.4x  |

| Top Ten Gainers | Close Price (BDT) | Δ%    | Turnover (BDT Mn) | PE    | PB   |
|-----------------|-------------------|-------|-------------------|-------|------|
| DGIC            | 27.1              | +9.7% | 136.9             | 33.4x | 2.4x |
| PROVATIINS      | 95.0              | +6.5% | 168.2             | 30.6x | 4.5x |
| ENVOYTEX        | 22.6              | +2.3% | 0.9               | 26.6x | 0.6x |
| SHYAMPSUG       | 40.9              | +1.0% | 0.3               | NM    | NM   |
| RAKCERAMIC      | 26.6              | +0.8% | 18.5              | 35.4x | 1.7x |
| MATINSPINN      | 34.6              | +0.6% | 0.0               | 10.0x | 0.7x |
| BNICL           | 74.3              | +0.4% | 65.8              | 23.5x | 3.8x |
| DUTCHBANGL      | 56.9              | -     | 0.6               | 5.7x  | 1.0x |
| UCB             | 13.8              | -     | 5.7               | 6.1x  | 0.5x |
| IPDC            | 22.6              | -     | 0.5               | 12.2x | 1.4x |

| Top Twenty Free Float Mcap | Free Float Mcap (BDT Mn) | % of Total Free Float Mcap | PE    | PB    |
|----------------------------|--------------------------|----------------------------|-------|-------|
| SQURPHARMA                 | 111,883                  | 8.3%                       | 12.0x | 2.1x  |
| BATBC                      | 74,800                   | 5.6%                       | 26.0x | 2.8x  |
| RENATA                     | 54,739                   | 4.1%                       | 25.3x | 4.9x  |
| BXPHARMA                   | 54,197                   | 4.0%                       | 19.4x | 2.2x  |
| GP                         | 43,088                   | 3.2%                       | 12.1x | 10.2x |
| BEXIMCO                    | 41,689                   | 3.1%                       | NM    | 1.0x  |
| BRACBANK                   | 27,155                   | 2.0%                       | 11.9x | 1.1x  |
| ISLAMIBANK                 | 21,945                   | 1.6%                       | 8.0x  | 0.7x  |
| ROBI                       | 21,108                   | 1.6%                       | NM    | 3.2x  |
| EBL                        | 20,745                   | 1.5%                       | 6.4x  | 1.1x  |
| OLYMPIC                    | 19,308                   | 1.4%                       | 15.5x | 3.8x  |
| LHBL                       | 18,008                   | 1.3%                       | 21.6x | 2.9x  |
| CITYBANK                   | 16,441                   | 1.2%                       | 5.6x  | 0.8x  |
| PUBALIBANK                 | 16,344                   | 1.2%                       | 10.0x | 0.7x  |
| SUMITPOWER                 | 16,108                   | 1.2%                       | 8.0x  | 1.3x  |
| BEACONPHAR                 | 15,862                   | 1.2%                       | 37.6x | 4.7x  |
| NBL                        | 14,813                   | 1.1%                       | 6.0x  | 0.4x  |
| UPGDCL                     | 14,736                   | 1.1%                       | 18.2x | 5.3x  |
| ALARABANK                  | 13,185                   | 1.0%                       | 6.3x  | 1.0x  |
| NATLIFEINS                 | 11,213                   | 0.8%                       | NM    | NM    |

| Most Traded Share | Close Price (BDT) | Δ%    | Turnover (BDT Mn) | PE    | PB   |
|-------------------|-------------------|-------|-------------------|-------|------|
| BEXIMCO           | 68.5              | -8.8% | 701.5             | NM    | 1.0x |
| ROBI              | 40.5              | -9.4% | 306.5             | NM    | 3.2x |
| BXPHARMA          | 174.0             | -5.8% | 208.3             | 19.4x | 2.2x |
| ASIAPACINS        | 57.9              | -3.8% | 197.3             | 31.9x | 2.8x |
| LANKABAFIN        | 24.9              | -9.8% | 171.4             | 18.9x | 1.4x |
| PROVATIINS        | 95.0              | +6.5% | 168.2             | 30.6x | 4.5x |
| LHBL              | 43.9              | -9.7% | 138.3             | 21.6x | 2.9x |
| DGIC              | 27.1              | +9.7% | 136.9             | 33.4x | 2.4x |
| BATBC             | 523.7             | -0.6% | 108.5             | 26.0x | 2.8x |
| SUMITPOWER        | 41.0              | -5.7% | 107.4             | 8.0x  | 1.3x |

| Top Ten Losers | Close Price (BDT) | Δ%     | Turnover (BDT Mn) | PE    | PB    |
|----------------|-------------------|--------|-------------------|-------|-------|
| GOLDENSON      | 10.8              | -10.0% | 9.5               | NM    | 0.5x  |
| SSSTEEL        | 15.3              | -10.0% | 33.8              | 8.1x  | 0.9x  |
| IFIC           | 9.0               | -10.0% | 100.6             | 12.9x | 0.5x  |
| DOMINAGE       | 18.0              | -10.0% | 7.2               | 8.2x  | 1.1x  |
| BDTHAI         | 18.1              | -10.0% | 11.2              | 25.0x | 0.7x  |
| SAVAREFR       | 147.6             | -9.9%  | 0.5               | NM    | 60.7x |
| ACFL           | 22.7              | -9.9%  | 2.1               | 15.5x | 0.6x  |
| TAUFIKA        | 20.0              | -9.9%  | 23.7              | 27.4x | 1.7x  |
| EPGL           | 38.2              | -9.9%  | 30.8              | 17.4x | 0.7x  |
| GQBALLPEN      | 118.4             | -9.9%  | 4.5               | NM    | 0.9x  |

| Block Trade | Maximum Price (BDT) | Minimum Price (BDT) | Turnover (BDT Mn) | Quantity ('000) | No. of |
|-------------|---------------------|---------------------|-------------------|-----------------|--------|
| ACFL        | 25.6                | 25.6                | 1.5               | 60              | 1      |
| BEXIMCO     | 71.5                | 71.5                | 0.8               | 11              | 1      |
| BSCCL       | 155.0               | 155.0               | 0.8               | 5               | 1      |
| BXPHARMA    | 184.0               | 184.0               | 59.7              | 325             | 2      |
| DBH         | 83.4                | 83.4                | 0.5               | 6               | 1      |
| DHAKABANK   | 12.0                | 12.0                | 6.0               | 500             | 1      |
| EBL         | 37.0                | 37.0                | 51.8              | 1,400           | 2      |
| GBBPOWER    | 29.0                | 27.5                | 36.4              | 1,255           | 7      |
| KOHINOOR    | 431.6               | 431.6               | 0.8               | 2               | 1      |
| LANKABAFIN  | 28.5                | 28.4                | 11.3              | 398             | 2      |

| Block Trade  | Maximum Price (BDT) | Minimum Price (BDT) | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|--------------|---------------------|---------------------|-------------------|-----------------|--------------|
| LHBL         | 49.0                | 49.0                | 0.7               | 15              | 1            |
| LRBDL        | 38.6                | 38.6                | 0.6               | 15              | 1            |
| MERCINS      | 32.2                | 32.2                | 3.1               | 96              | 1            |
| NLTUBES      | 103.1               | 103.1               | 1.6               | 16              | 2            |
| ORIONINFU    | 69.0                | 69.0                | 1.3               | 19              | 1            |
| PARAMOUNT    | 106.0               | 106.0               | 5.7               | 54              | 1            |
| PROVATIINS   | 98.0                | 83.2                | 66.6              | 737             | 4            |
| RENATA       | 1,150.4             | 1,150.4             | 2.5               | 2               | 1            |
| RINGSHINE    | 5.8                 | 5.8                 | 0.5               | 86              | 1            |
| SINGERBD     | 160.5               | 160.5               | 0.6               | 4               | 1            |
| SKTRIMS      | 56.1                | 56.1                | 1.2               | 21              | 1            |
| SONARBAINS   | 45.5                | 45.5                | 0.9               | 20              | 1            |
| SONARGAON    | 24.5                | 24.5                | 3.8               | 154             | 1            |
| SQURPHARMA   | 201.0               | 201.0               | 2.0               | 10              | 1            |
| TRUSTBANK    | 33.0                | 33.0                | 1.7               | 50              | 2            |
| UTTARABANK   | 24.3                | 24.3                | 53.5              | 2,200           | 2            |
| WATACHEM     | 280.0               | 280.0               | 0.5               | 2               | 1            |
| <b>Total</b> |                     |                     | <b>316.5</b>      |                 | <b>42</b>    |

**Important DSE News**
**REGL**

BSEC NEWS: This is to inform all concerned that Market will remain open irrespective of Lockdown.

**KEYACOSMET**

The Company will be placed in 'B' category from existing 'Z' category with effect from April 05, 2021 as the Company has reported disbursement of 1% cash dividend for the year ended on June 30, 2020.

**Upcoming Corporate Events**

| DSE Ticker | Right Share | Dividend |       | Event       | Date      |
|------------|-------------|----------|-------|-------------|-----------|
|            |             | Stock    | Cash  |             |           |
| RELIANCINS | -           | 0.0%     | 25.0% | Record Date | 04-Apr-21 |
| SHAHJABANK | -           | 5.0%     | 7.0%  | Record Date | 04-Apr-21 |
| UNITEDINS  | -           | 0.0%     | 11.0% | Record Date | 04-Apr-21 |
| LANKABAFIN | -           | 0.0%     | 12.0% | Record Date | 05-Apr-21 |
| MERCANBANK | -           | 5.0%     | 10.0% | Record Date | 05-Apr-21 |
| AGRANINS   | -           | 5.0%     | 5.0%  | Record Date | 06-Apr-21 |
| GHAIL      | -           | 0.0%     | 2.0%  | Record Date | 08-Apr-21 |
| BANKASIA   | -           | 0.0%     | 10.0% | Record Date | 08-Apr-21 |
| UNITEDFIN  | -           | 0.0%     | 10.0% | Record Date | 11-Apr-21 |

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