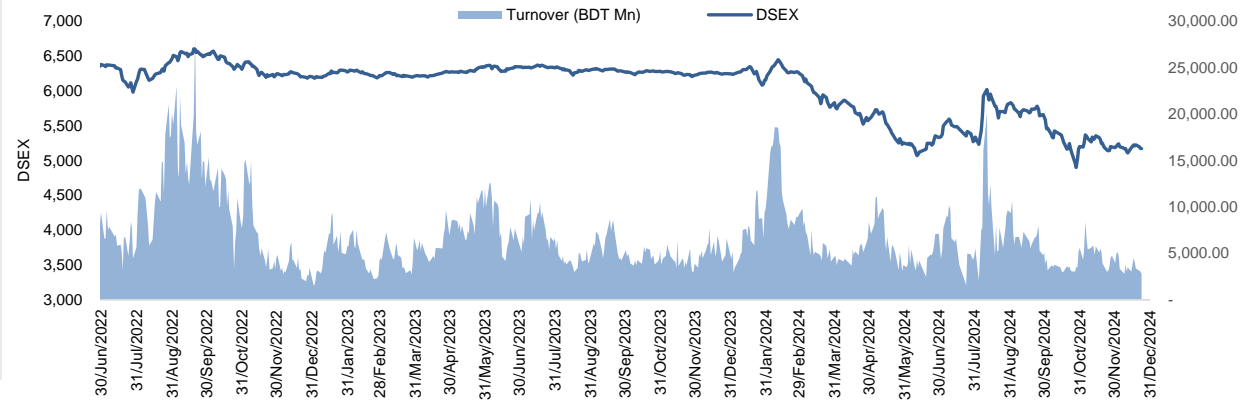


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.03%) lost 1.47 points and closed at 5,169.32. The blue-chip index DS30 (+0.05%), the Shariah-based index DSES (+0.24%), and the large-cap index CDSET (-0.23%) closed at 1,923.02, 1,158.69, and 1,057.56 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.92% followed by Fuel & Power (-0.87%), Food & Allied (-0.19%), Telecommunication (-0.18%), Engineering (-0.06%), Pharmaceutical (+0.13%), and Bank (+0.51%), respectively. Block trades contributed 9.6% of the overall market turnover. Orion Infusion Ltd. (+3.4%) was the most traded share with a turnover of BDT 187 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,169.32	5,170.79	-1.47	-0.03%	-17.2%
DS30	1,923.02	1,922.11	+0.91	+0.05%	-8.2%
DSES	1,158.69	1,155.90	+2.78	+0.24%	-15.1%
CDSET	1,057.56	1,059.95	-2.39	-0.23%	-12.1%

	Advanced	Declined	Unchanged	Total
All Category	150	159	86	395
A Category (Equity)	71	99	54	224
B Category (Equity)	39	31	15	85
N Category (Equity)	0	3	1	4
Z Category (Equity)	40	26	16	82
Mutual Funds	7	11	19	37
Corporate Bonds	1	0	1	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,590,573	6,591,971	-0.0%
	Mn USD	54,921	54,933	
Turnover	Mn BDT	2,758	3,033	
	Mn USD	23	25	-9.1%
Volume	Mn Shares	108	106	+2.0%
No. of Trade		98,406	106,885	-7.9%

* Average Interbank Exchange Rate is BDT 120.00 as of Dec 24, 2024

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Figure: Sectorial Turnover (BDT Mn)

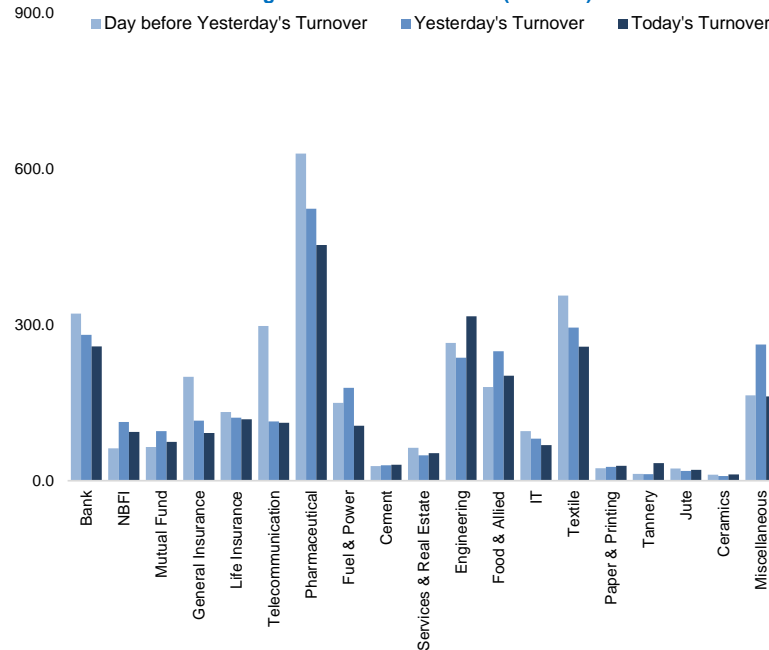
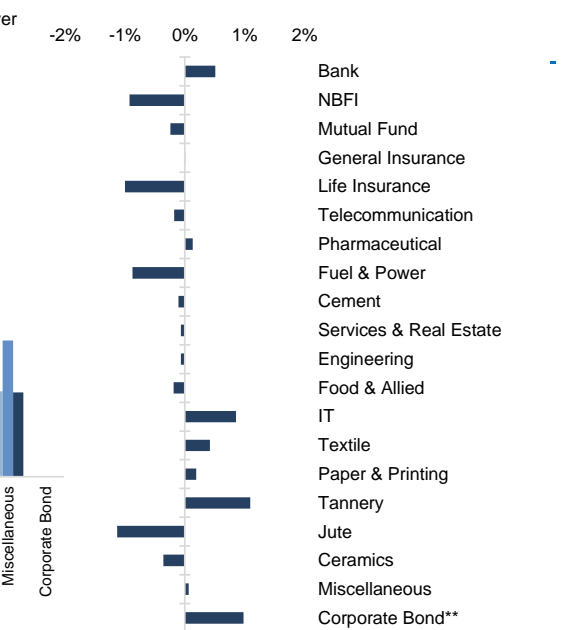


Figure: Sectorial Mcap Change



Market PE 14.6x
Market PB 1.2x

* 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	1,425	1,418	+7.24	+0.51%	36	674,202	10.2%	258.2	10.4%	8.7x	0.7x	GP	435,472	12.2%	20.6	12.3x	7.5x
NBFI	1,180	1,191	-10.99	-0.92%	23	112,473	1.7%	94.0	3.8%	NM	NM	SQRPHARMA	193,158	5.4%	16.9	9.2x	1.5x
Mutual Fund	594	595	-1.43	-0.24%	37	27,296	0.4%	74.7	3.0%	NM	0.5x	BATBC	189,270	5.3%	18.4	10.8x	3.1x
General Insurance	2,729	2,729	+0.22	+0.01%	43	77,907	1.2%	91.8	3.7%	14.1x	1.2x	WALTONHIL	147,466	4.1%	2.7	11.3x	1.3x
Life Insurance	1,816	1,835	-18.29	-1.00%	15	48,305	0.7%	118.2	4.7%	NM	NM	ROBI	147,186	4.1%	88.3	26.8x	2.2x
Telecommunication	5,156	5,165	-9.12	-0.18%	3	604,579	9.2%	111.6	4.5%	14.3x	4.3x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,966	2,962	+3.86	+0.13%	34	562,211	8.5%	453.3	18.2%	14.3x	1.5x	BRACBANK	86,008	2.4%	28.3	7.8x	1.1x
Fuel & Power	1,097	1,106	-9.64	-0.87%	23	290,495	4.4%	105.8	4.2%	14.1x	0.6x	BERGERPBL	83,462	2.3%	0.6	25.1x	5.3x
Cement	1,941	1,943	-2.01	-0.10%	7	92,510	1.4%	30.6	1.2%	15.6x	2.0x	ISLAMIBANK	78,407	2.2%	42.2	16.8x	1.1x
Services & Real Estate	1,008	1,009	-0.65	-0.06%	9	55,434	0.8%	53.1	2.1%	18.5x	0.4x	RENATA	75,883	2.1%	6.1	23.8x	2.2x
Engineering	2,486	2,488	-1.61	-0.06%	42	280,470	4.3%	316.1	12.7%	12.3x	0.8x	UPGDCL	71,303	2.0%	2.8	6.8x	1.9x
Food & Allied	16,596	16,627	-31.34	-0.19%	21	303,660	4.6%	201.8	8.1%	16.2x	4.3x	LHB	61,321	1.7%	12.2	15.2x	3.0x
IT	1,998	1,981	+16.91	+0.85%	11	26,353	0.4%	68.6	2.8%	19.4x	1.7x	ICB	52,209	1.5%	51.3	26.9x	1.2x
Textile	1,087	1,082	+4.54	+0.42%	58	113,177	1.7%	257.4	10.3%	NM	0.7x	UNILEVERCL	48,768	1.4%	0.1	66.4x	20.8x
Paper & Printing	4,018	4,010	+7.58	+0.19%	6	18,153	0.3%	28.8	1.2%	NM	0.8x	DUTCHBANGL	42,271	1.2%	1.5	6.8x	0.9x
Tannery	1,973	1,952	+21.30	+1.09%	6	21,981	0.3%	33.8	1.4%	67.3x	1.5x	BXPHERMA	36,135	1.0%	37.3	6.0x	0.7x
Jute	14,498	14,663	-165.46	-1.13%	3	3,191	0.0%	20.8	0.8%	NM	NM	POWERGRID	36,004	1.0%	6.9	NM	0.2x
Ceramics	356	357	-1.28	-0.36%	5	15,980	0.2%	12.2	0.5%	NM	1.0x	PUBALIBANK	33,895	0.9%	9.3	3.5x	0.6x
Miscellaneous	4,227	4,224	+2.81	+0.07%	15	229,527	3.5%	161.9	6.5%	41.5x	1.8x	EBL	33,410	0.9%	13.2	5.1x	0.8x
Corporate Bond**	13,646	13,513	+132.76	+0.98%	16	33,760	0.5%	0.1	0.0%	NM	NM	OLYMPIC	31,110	0.9%	2.7	16.9x	2.8x
Treasury Bond**	527	521	+5.18	+0.99%	235	2,998,360	45.5%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KPPL	7.9	+9.7%	4.4	NM	NM
SKTRIMS	16.2	+9.5%	6.3	30.0x	1.0x
FORTUNE	17.0	+9.0%	29.2	41.5x	1.2x
BAYLEASING	6.9	+7.8%	0.2	NM	2.0x
OAL	7.0	+7.7%	2.4	NM	0.7x
CENTRALPHL	8.6	+7.50%	8.7	NM	1.2x
LRBDL	13.5	+6.3%	13.9	NM	0x
ENVOYTEX	41.5	+6.1%	3.1	9.3x	0.8x
OIMEX	28.7	+5.9%	86.7	28.9x	8.3x
SHARPIND	22.0	+5.8%	13.0	61.1x	2.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
HRTEX	26.8	-6.0%	14.1	NM	1.3x
FAREASTFIN	3.3	-5.7%	0.3	NM	NM
SIMTEX	17.8	-4.8%	7.6	19.1x	0.8x
PLFSL	2.3	-4.2%	0.3	NM	NM
1STPRIMFMF	31.7	-3.9%	36.7	NM	3.0x
NBL	5.0	-3.8%	7.7	NM	2.7x
FAMILYTEX	2.5	-3.8%	0.4	NM	0.2x
ALARABANK	18.8	-3.6%	1.3	12.3x	0.9x
BDFINANCE	11.6	-3.3%	6.6	NM	1.1x
POWERGRID	39.4	-3.2%	6.9	NM	0.2x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQRPHARMA	117,112	8.6%	9.2x	1.5x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.8x	3.1x
RENATA	35,002	2.6%	23.8x	2.2x
ISLAMIBANK	33,649	2.5%	16.8x	1.1x
BXPHERMA	32,479	2.4%	6.0x	0.7x
BRACBANK	32,157	2.4%	7.8x	1.1x
GP	30,004	2.2%	12.3x	7.5x
LHB	24,690	1.8%	15.2x	3.0x
EBL	24,199	1.8%	5.1x	0.8x
PUBALIBANK	20,448	1.5%	3.5x	0.6x
NBL	16,930	1.2%	NM	2.7x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	4.8x	0.5x
ALARABANK	13,534	1.0%	12.3x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	16.9x	2.8x
UTTARABANK	11,350	0.8%	7.4x	0.7x
ORIONPHARM	11,317	0.8%	43.8x	0.4x
ROBI	10,738	0.8%	26.8x	2.2x

* 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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	423.6	+3.4%	186.8	NM	26.5x
ROBI	28.1	-	88.3	26.8x	2.2x
OIMEX	28.7	+5.9%	86.7	28.9x	8.3x
BSC	91.9	-1.7%	80.9	4.8x	0.9x
LOVELLO	85.0	+3.9%	77.0	46.3x	6.5x
GPHISPAT	22.1	-0.9%	72.2	11.2x	0.4x
KBPPWBIL	141.6	+2.0%	57.1	NM	11.9x
SUNLIFEINS	68.4	+1.5%	53.8	NM	NM
ICB	60.2	-2.4%	51.3	26.9x	1.2x
ISLAMIBANK	48.7	+4.7%	42.2	16.8x	1.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SIBL	8.0	8.0	2.0	8,903	71.22
BANKASIA	17.0	17.0	1.0	3,579	60.84
ALARABANK	18.9	18.9	1.0	965	18.24
SQRPHARMA	219.5	219.5	2.0	70	15.37
BRACBANK	49.8	49.2	2.0	310	15.30
AIL	93.0	82.1	7.0	113	10.21
RELIANCE1	19.3	18.7	7.0	510	9.72
GP	323.2	323.2	3.0	30	9.70
LOVELLO	83.8	83.0	2.0	84	6.97
PRIMEBANK	23.2	23.2	5.0	300	6.96

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SIBL	8.0	8.0	71.2	8,903	2
BANKASIA	17.0	17.0	60.8	3,579	1
ALARABANK	18.9	18.9	18.2	965	1
SQURPHARMA	219.5	219.5	15.4	70	2
BRACBANK	49.8	49.2	15.3	310	2
AIL	93.0	82.1	10.2	113	7
RELIANCE1	19.3	18.7	9.7	510	7
GP	323.2	323.2	9.7	30	3
LOVELLO	83.8	83.0	7.0	84	2
PRIMEBANK	23.2	23.2	7.0	300	5
EIL	55.0	55.0	5.5	100	1
ASIATICLAB	35.9	35.2	5.2	148	2
PEOPLESINS	33.9	33.9	4.2	124	4
BEACHHATCH	93.5	81.1	3.6	40	4
BEXIMCO	99.4	99.4	2.8	28	1
RUPALILIFE	103.3	103.3	2.1	20	1
AMANFEED	25.2	25.2	2.0	81	1
ACMELAB	81.0	81.0	1.9	23	1
BXPHERMA	89.7	80.1	1.5	18	2
AL-HAJTEX	130.0	130.0	1.3	10	1
EBL	26.0	26.0	1.3	50	1
SUNLIFEINS	65.0	65.0	1.3	20	1
Total			265.2		64

Important DSE News
HRTEX

The Board of Directors has recommended No Dividend for the year ended June 30, 2024. Date of AGM: 19.03.2025, Time: 11:30 AM. Venue: Hybrid Platform and at Pride Hamza (Ground Floor), House-54, Road-1, Sector-6, Uttara, Dhaka-1230. Record Date: 22.01.2025. The Company has also reported EPS of Tk. (19.67), NAV per share of Tk. 21.43 and NOCFPS of Tk. (10.90) for the year ended June 30, 2024 as against Tk. 0.54, Tk. 41.33 and Tk. (14.17) respectively for the year ended June 30, 2023.

EXIMBANK

Refer to the earlier news disseminated by DSE on 18.03.2024 regarding Amalgamation of Padma Bank PLC. with the company, the company has further informed that the Board of Directors of the company in its meeting held on December 23, 2024 has decided not to carry out the amalgamation/merger of Padma Bank PLC. with the company.

APOLOISPAT

Refer to the earlier news disseminated by DSE on November 21, 2024, regarding the board's approval of financial statements and AGM schedule, the company has further informed that the Board of Directors recommended No Dividend for the financial years ending June 30, 2020, 2021, 2022, and 2023, which was subsequently approved in the 26th to 29th AGMs of the company held on December 19, 2024.

BEXIMCO

The company has informed that a total 33,820 ordinary shares of Tk.10.00 each of Bangladesh Export Import Company Ltd. has been credited to the respective BO IDs of the 27 Nos. of Sukukholders who applied for conversion of their Sukuk holdings into ordinary shares of Bangladesh Export Import Company Limited.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
MAKSONSPIN		0.0%	0.0%	Record Date	29-Dec-24
DACCADYE		0.0%	0.0%	Record Date	7-Jan-25
AL-HAJTEX		0.0%	0.0%	Record Date	8-Jan-25
NBL		0.0%	0.0%	Record Date	16-Jan-25
HRTEX		0.0%	0.0%	Record Date	22-Jan-25

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