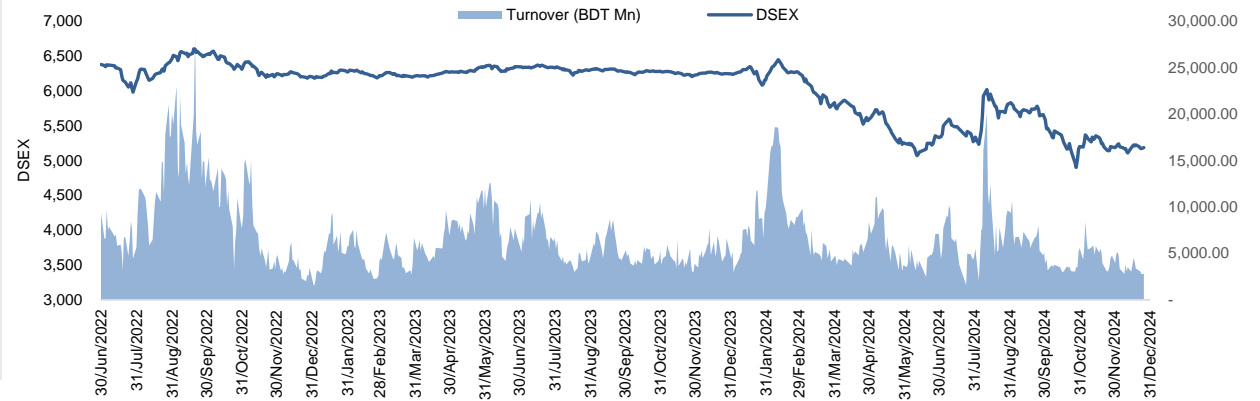


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.29%) gained 15.12 points and closed at 5,184.45. The blue-chip index DS30 (+0.22%), the Shariah-based index DSES (+0.69%), and the large-cap index CDSET (+0.37%) closed at 1,927.28, 1,166.64, and 1,061.44 points, respectively. Most of the large-cap sectors posted positive performance today. NBF1 booked the highest gain of 1.67% followed by Food & Allied (+0.86%), Engineering (+0.46%), Fuel & Power (+0.41%), Pharmaceutical (+0.23%), Telecommunication (-0.06%), and Bank (-0.26%), respectively. Block trades contributed 11.6% of the overall market turnover. Orion Infusion Ltd. (+0.3%) was the most traded share with a turnover of BDT 180 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,184.45	5,169.32	+15.12	+0.29%	-17.0%
DS30	1,927.28	1,923.02	+4.26	+0.22%	-8.0%
DSES	1,166.64	1,158.69	+7.95	+0.69%	-14.5%
CDSET	1,061.44	1,057.56	+3.88	+0.37%	-11.8%

	Advanced	Declined	Unchanged	Total
All Category	187	128	81	396
A Category (Equity)	101	76	48	225
B Category (Equity)	42	30	13	85
N Category (Equity)	4	0	0	4
Z Category (Equity)	40	22	20	82
Mutual Funds	4	9	23	36
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,601,610	6,590,573	+0.2%
Mn USD	55,013	54,921	
Turnover			
Mn BDT	2,822	2,758	+2.3%
Mn USD	24	23	
Volume			
Mn Shares	95	108	-12.8%
No. of Trade	91,560	98,406	-7.0%

* Average Interbank Exchange Rate is BDT 120.00 as of Dec 26, 2024

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Figure: Sectorial Turnover (BDT Mn)

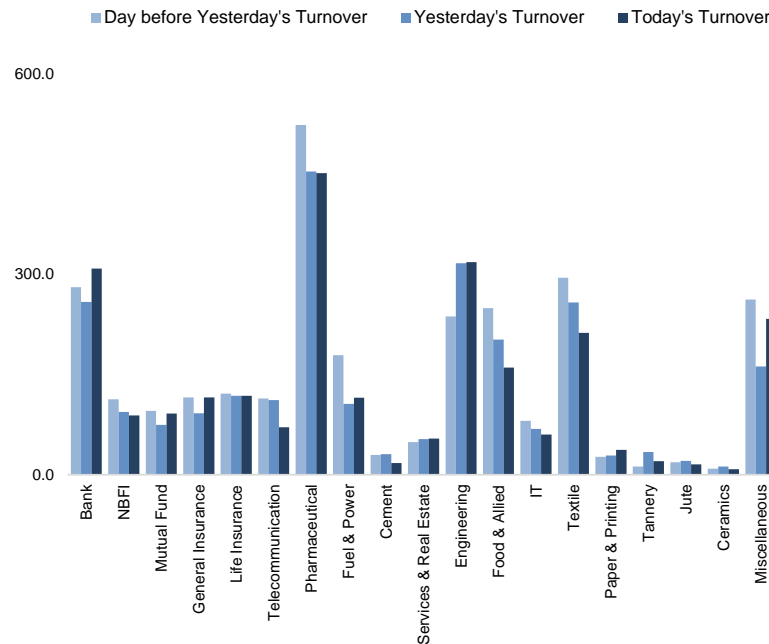
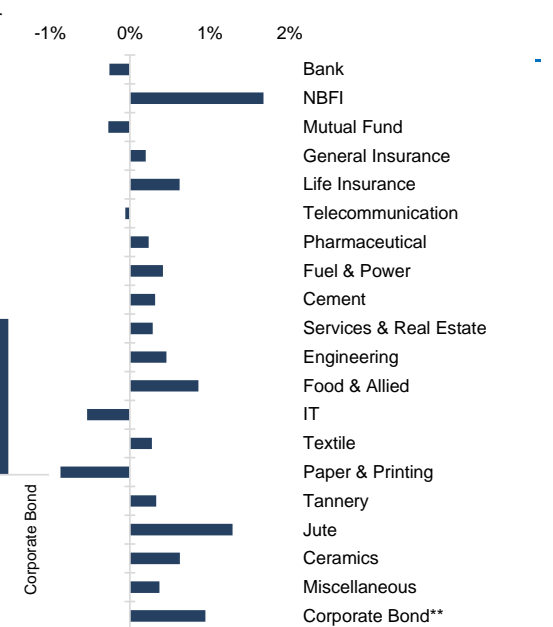


Figure: Sectorial Mcap Change



Market PE 14.7x
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	1,421	1,425	-3.65	-0.26%	36	672,476	10.2%	308.1	12.3%	8.7x	0.7x	GP	435,472	12.2%	16.9	12.3x	7.5x
NBFI	1,200	1,180	+19.74	+1.67%	23	114,354	1.7%	88.5	3.5%	NM	NM	SQURPHARMA	192,005	5.4%	40.0	9.1x	1.4x
Mutual Fund	592	594	-1.60	-0.27%	37	27,222	0.4%	91.3	3.7%	NM	0.5x	BATBC	191,214	5.3%	27.8	10.9x	3.1x
General Insurance	2,734	2,729	+5.39	+0.20%	43	78,061	1.2%	115.6	4.6%	14.1x	1.2x	WALTONHIL	148,193	4.1%	2.5	11.4x	1.3x
Life Insurance	1,828	1,816	+11.33	+0.62%	15	48,606	0.7%	118.2	4.7%	NM	NM	ROBI	146,662	4.1%	46.8	26.7x	2.2x
Telecommunication	5,153	5,156	-3.03	-0.06%	3	604,223	9.2%	71.1	2.9%	14.3x	4.3x	BEXIMCO	103,847	2.9%	0.1	NM	1.3x
Pharmaceutical	2,973	2,966	+6.94	+0.23%	34	563,526	8.5%	450.8	18.1%	14.3x	1.5x	BRACBANK	86,362	2.4%	21.3	7.8x	1.2x
Fuel & Power	1,101	1,097	+4.55	+0.41%	23	291,699	4.4%	115.3	4.6%	14.1x	0.6x	BERGERPBL	83,517	2.3%	1.8	25.1x	5.3x
Cement	1,947	1,941	+6.12	+0.32%	7	92,802	1.4%	17.6	0.7%	15.6x	2.0x	ISLAMIBANK	76,797	2.1%	26.9	16.4x	1.1x
Services & Real Estate	1,011	1,008	+2.87	+0.28%	9	55,592	0.8%	53.9	2.2%	18.5x	0.4x	RENATA	75,321	2.1%	6.9	23.6x	2.2x
Engineering	2,498	2,486	+11.41	+0.46%	42	281,757	4.3%	317.8	12.7%	12.3x	0.9x	UPGDCL	71,824	2.0%	2.8	6.9x	1.9x
Food & Allied	16,738	16,596	+142.42	+0.86%	21	306,266	4.6%	160.1	6.4%	16.4x	4.3x	LHB	61,785	1.7%	5.2	15.3x	3.1x
IT	1,987	1,998	-10.67	-0.53%	11	26,213	0.4%	60.0	2.4%	19.3x	1.7x	ICB	54,117	1.5%	53.9	27.8x	1.2x
Textile	1,090	1,087	+3.01	+0.28%	58	113,490	1.7%	211.9	8.5%	NM	0.8x	UNILEVERCL	48,928	1.4%	0.1	66.6x	20.8x
Paper & Printing	3,983	4,018	-34.94	-0.87%	6	17,995	0.3%	37.2	1.5%	NM	0.8x	DUTCHBANGL	41,832	1.2%	0.6	6.7x	0.9x
Tannery	1,979	1,973	+6.53	+0.33%	6	22,054	0.3%	20.5	0.8%	67.5x	1.5x	POWERGRID	37,557	1.0%	7.7	NM	0.2x
Jute	14,685	14,498	+186.68	+1.29%	3	3,232	0.0%	15.3	0.6%	NM	NM	BXPHARMA	36,314	1.0%	18.7	6.0x	0.7x
Ceramics	358	356	+2.24	+0.63%	5	16,081	0.2%	8.3	0.3%	NM	1.0x	PUBALIBANK	33,779	0.9%	72.5	3.5x	0.6x
Miscellaneous	4,242	4,227	+15.60	+0.37%	15	230,374	3.5%	233.0	9.3%	41.6x	1.8x	EBL	33,274	0.9%	13.0	5.1x	0.8x
Corporate Bond**	13,775	13,646	+129.12	+0.95%	16	33,760	0.5%	0.3	0.0%	NM	NM	BEACONPHAR	32,594	0.9%	48.6	63.6x	5.1x
Treasury Bond**	532	527	+5.92	+1.13%	235	3,001,289	45.5%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
USMANIAGL	37.4	+9.4%	0.5	NM	0.5x
HRTEX	29.3	+9.3%	9.7	NM	1.4x
SAFKOSPINN	9.1	+5.8%	0.3	NM	NM
BEACONPHAR	141.1	+5.8%	48.6	63.6x	5.1x
KPCL	13.2	+5.6%	4.2	NM	0.7x
JUTESPINN	266.2	+5.47%	0.1	NM	NM
MIRACLEIND	27.4	+5.4%	10.2	NM	2x
NORTHERN	118.3	+5.1%	0.1	NM	1.4x
LEGACYFOOT	53.0	+4.7%	14.0	NM	4.7x
RENWICKJA	697.3	+4.5%	0.0	NM	NM

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MERCINS	22.5	-10.0%	0.0	28.1x	1.2x
JAMUNAOIL	170.3	-8.6%	44.6	3.9x	1x
SALAMCRST	9.7	-8.5%	2.5	60.6x	0.5x
BIFC	7.9	-8.1%	0.4	NM	NM
ICBAMCL2ND	6.0	-4.8%	0.1	NM	1.0x
ANLIMAYARN	20.5	-4.2%	1.2	NM	2.7x
DAFODILCOM	63.1	-4.1%	1.7	NM	4.7x
1STPRIMFMF	30.4	-4.1%	57.4	NM	2.9x
BDWELDING	9.8	-3.9%	0.3	NM	0.9x
PF1STMF	5.3	-3.6%	1.8	NM	0.9x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.1x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.9x	3.1x
RENATA	35,002	2.6%	23.6x	2.2x
ISLAMIBANK	33,649	2.5%	16.4x	1.1x
BXPHARMA	32,479	2.4%	6.0x	0.7x
BRACBANK	32,157	2.4%	7.8x	1.2x
GP	30,004	2.2%	12.3x	7.5x
LHB	24,690	1.8%	15.3x	3.1x
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%	12.8x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	17.2x	2.8x
UTTARABANK	11,350	0.8%	7.3x	0.7x
ORIONPHARM	11,317	0.8%	43.7x	0.4x
ROBI	10,738	0.8%	26.7x	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	424.8	+0.3%	180.3	NM	26.6x
OIMEX	28.7	-	91.4	28.9x	8.3x
BSC	94.5	+2.8%	87.0	5.0x	0.9x
KBPPWBIL	144.2	+1.8%	76.5	NM	12.1x
PUBALIBANK	29.2	-0.3%	72.5	3.5x	0.6x
DOMINAGE	13.2	+3.1%	62.0	NM	0.8x
1STPRIMFMF	30.4	-4.1%	57.4	NM	2.9x
EIL	58.7	-0.2%	55.1	41.0x	3.1x
ICB	62.4	+3.7%	53.9	27.8x	1.2x
RUPALILIFE	108.9	+3.3%	52.4	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACONPHAR	132.0	121.0	4.0	1,482	195.04
EIL	58.0	55.0	3.0	927	51.09
SIBL	9.6	8.0	4.0	2,183	18.86
BXPHARMA	84.0	80.0	4.0	160	13.01
IBNSINA	301.0	261.0	2.0	20	5.33
SUNLIFEINS	68.0	64.0	2.0	75	5.00
LOVELLO	85.0	85.0	2.0	50	4.25
ROBI	28.8	28.7	2.0	140	4.02
OLYMPIC	170.0	170.0	1.0	20	3.40
PREMIERCEM	50.4	47.0	2.0	70	3.36

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BEACONPHAR	132.0	121.0	195.0	1,482	4
EIL	58.0	55.0	51.1	927	3
SIBL	9.6	8.0	18.9	2,183	4
BXPHARMA	84.0	80.0	13.0	160	4
IBNSINA	301.0	261.0	5.3	20	2
SUNLIFEINS	68.0	64.0	5.0	75	2
LOVELLO	85.0	85.0	4.3	50	2
ROBI	28.8	28.7	4.0	140	2
OLYMPIC	170.0	170.0	3.4	20	1
PREMIERCEM	50.4	47.0	3.4	70	2
AMANFEED	26.1	25.2	1.9	74	2
1STPRIMFMF	34.5	34.5	1.7	50	2
FINEFOODS	213.0	213.0	1.7	8	1
GP	323.1	294.4	1.6	5	2
MIDLANDBNK	32.7	32.7	1.6	48	1
SHAHJABANK	18.7	18.6	1.4	75	2
IDLC	34.9	34.9	1.2	35	1
DACCADYE	14.0	14.0	1.1	79	1
RUPALILIFE	107.0	107.0	1.1	10	1
ASIATICLAB	35.9	35.9	1.0	29	1
RENATA	680.5	680.5	0.8	1	1
BRACBANK	48.9	48.9	0.8	17	1
Total			327.2		55

Important DSE News

BATBC

The company has informed that the Board of Directors of the company in its meeting dated 24th December 2024 approved the investment of BDT 28.38 Crore that is required to increase the capacity. The investment will be funded from internal sources and bank financing based on the cash flow of the Company. To view the details, please visit the following link: https://www.dsebd.org/Annexure/2024/BAT%20Bangladesh%20PSI_2024.pdf

AZIZPIPES

The company has informed that the Board of Directors has appointed Mr. AHM Zakaria as the Managing Director of the company with effect from 26.10.2024.

SAMORITA

The Company will be placed in 'B' category from existing 'A' category with effect from December 29, 2024 as the Company has approved 5% Cash Dividend for the year ended June 30, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
MAKSONSPIN		0.0%	0%	Record Date	29-Dec-24
DACCADYE		0.0%	0%	Record Date	7-Jan-25
AL-HAJTEX		0.0%	0%	Record Date	8-Jan-25
NBL		0.0%	0%	Record Date	16-Jan-25
HRTEX		0.0%	0%	Record Date	22-Jan-25

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