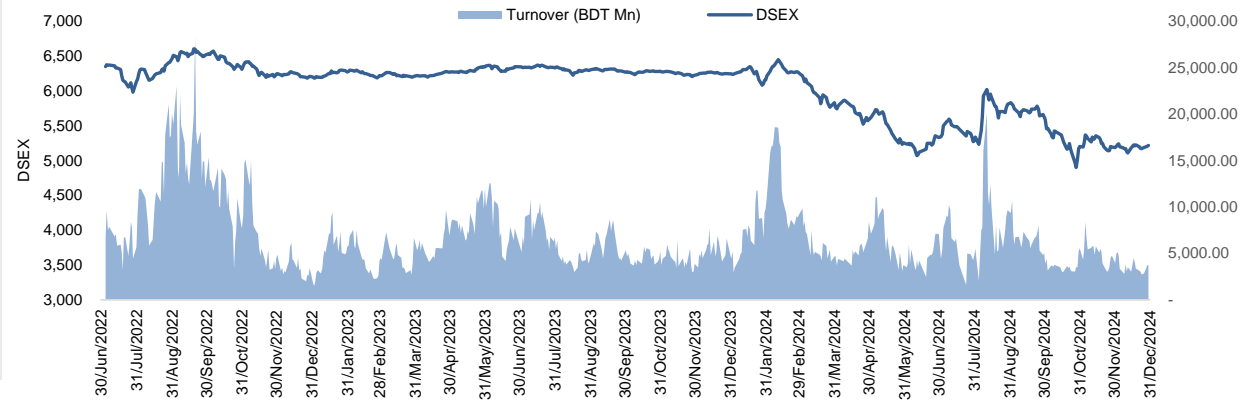


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.22%) gained 11.66 points and closed at 5,216.44. The blue-chip index DS30 (+0.42%), the Shariah-based index DSES (+0.22%), and the large-cap index CDSET (+0.30%) closed at 1,939.73, 1,168.90, and 1,066.09 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 1.37% followed by Fuel & Power (+0.16%), Bank (+0.14%), Telecommunication (+0.11%), Pharmaceutical (+0.11%), Engineering (-0.22%), and NBF1 (-0.72%), respectively. Block trades contributed 3.8% of the overall market turnover. Orion Infusion Ltd. (-1.1%) was the most traded share with a turnover of BDT 243 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,216.44	5,204.78	+11.66	+0.22%	-16.5%
DS30	1,939.73	1,931.68	+8.05	+0.42%	-7.4%
DSES	1,168.90	1,166.30	+2.60	+0.22%	-14.3%
CDSET	1,066.09	1,062.95	+3.14	+0.30%	-11.4%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	142	184	71	397
<b>A Category (Equity)</b>	86	98	39	223
<b>B Category (Equity)</b>	29	47	12	88
<b>N Category (Equity)</b>	1	2	1	4
<b>Z Category (Equity)</b>	26	37	19	82
<b>Mutual Funds</b>	13	7	17	37
<b>Corporate Bonds</b>	1	1	0	2
<b>Treasury Bonds</b>	0	0	0	0

	Today	Last Day	Daily %Δ
<b>Mcap</b>	Mn BDT 6,626,198	6,619,100	+0.1%
	Mn USD 55,218	55,159	
<b>Turnover</b>	Mn BDT 3,739	3,744	-0.1%
	Mn USD 31	31	
<b>Volume</b>	Mn Shares 120	120	-0.0%
<b>No. of Trade</b>	120,895	109,813	+10.1%

\* Average Interbank Exchange Rate is BDT 120.00 as of Dec 30, 2024

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Figure: Sectorial Turnover (BDT Mn)

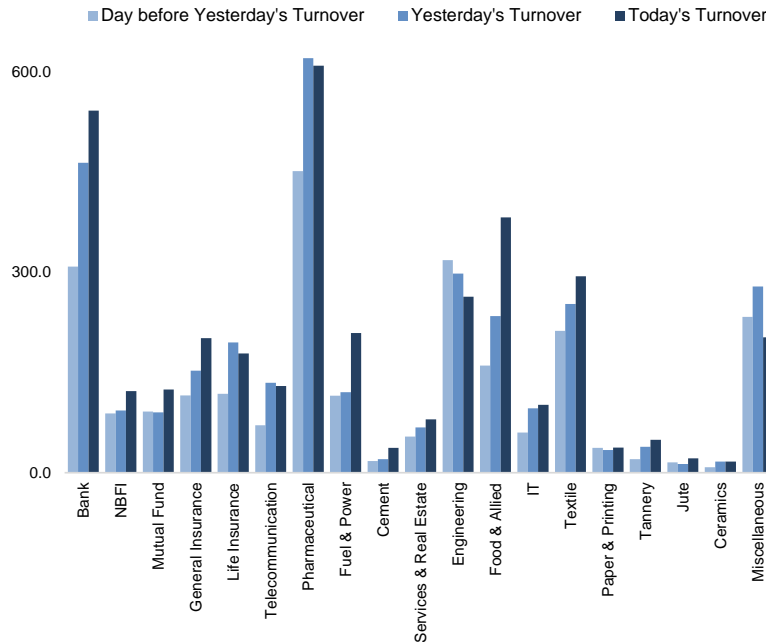
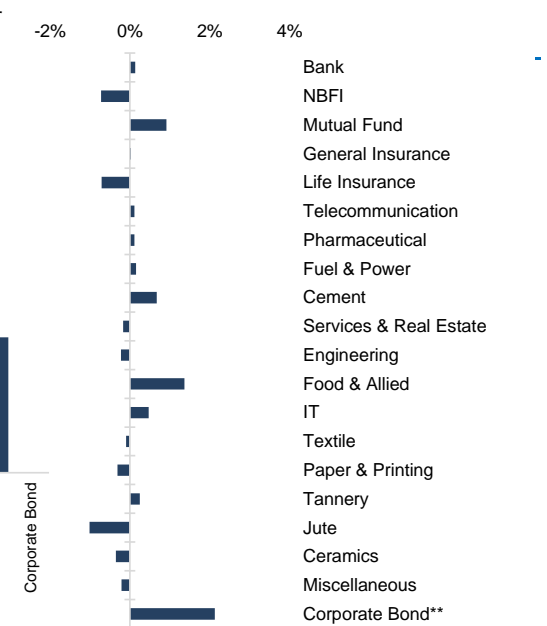


Figure: Sectorial Mcap Change



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	1,430	1,428	+1.94	+0.14%	36	676,447	10.2%	541.1	15.0%	8.7x	0.7x	GP	436,282	12.1%	38.9	12.3x	7.6x
NBFI	1,188	1,197	-8.61	-0.72%	23	113,227	1.7%	122.0	3.4%	NM	NM	BATBC	198,504	5.5%	118.5	11.3x	3.2x
Mutual Fund	603	598	+5.48	+0.92%	37	27,729	0.4%	124.4	3.5%	NM	0.5x	SQURPHARMA	192,980	5.4%	36.7	9.2x	1.5x
General Insurance	2,773	2,772	+0.73	+0.03%	43	79,155	1.2%	201.2	5.6%	14.3x	1.2x	ROBI	148,234	4.1%	53.4	27.0x	2.3x
Life Insurance	1,827	1,840	-13.03	-0.71%	15	48,601	0.7%	178.5	5.0%	NM	NM	WALTONHIL	147,678	4.1%	6.8	11.3x	1.3x
Telecommunication	5,186	5,180	+5.95	+0.11%	3	608,101	9.2%	129.5	3.6%	14.4x	4.3x	BEXIMCO	103,847	2.9%	1.1	NM	1.3x
Pharmaceutical	2,960	2,956	+3.36	+0.11%	34	561,097	8.5%	608.3	16.9%	14.3x	1.5x	BRACBANK	86,716	2.4%	27.7	7.8x	1.2x
Fuel & Power	1,109	1,107	+1.73	+0.16%	23	293,671	4.4%	208.9	5.8%	14.2x	0.6x	BERGERPBL	84,542	2.3%	0.8	25.4x	5.3x
Cement	1,957	1,944	+13.10	+0.67%	7	93,275	1.4%	37.0	1.0%	15.7x	2.0x	ISLAMIBANK	77,924	2.2%	30.5	16.7x	1.1x
Services & Real Estate	1,014	1,015	-1.69	-0.17%	9	55,747	0.8%	79.8	2.2%	18.6x	0.4x	RENATA	72,844	2.0%	13.2	22.8x	2.1x
Engineering	2,497	2,502	-5.59	-0.22%	42	281,655	4.3%	263.2	7.3%	12.3x	0.9x	UPGDCL	71,650	2.0%	2.4	6.9x	1.9x
Food & Allied	17,178	16,945	+232.14	+1.37%	21	314,303	4.7%	381.9	10.6%	16.8x	4.4x	LHB	62,598	1.7%	18.1	15.5x	3.1x
IT	1,995	1,986	+9.41	+0.47%	11	26,313	0.4%	101.4	2.8%	19.4x	1.7x	ICB	53,423	1.5%	27.2	27.5x	1.2x
Textile	1,093	1,094	-1.03	-0.09%	58	113,868	1.7%	293.5	8.2%	NM	0.8x	UNILEVERCL	49,144	1.4%	0.3	66.9x	20.9x
Paper & Printing	3,998	4,011	-12.34	-0.31%	6	18,063	0.3%	37.5	1.0%	NM	0.8x	DUTCHBANGL	42,095	1.2%	1.1	6.7x	0.9x
Tannery	2,020	2,015	+5.07	+0.25%	6	22,509	0.3%	49.4	1.4%	68.9x	1.6x	POWERGRID	38,197	1.1%	30.0	NM	0.2x
Jute	14,456	14,603	-147.56	-1.01%	3	3,182	0.0%	21.5	0.6%	NM	NM	BXPHARMA	36,403	1.0%	40.4	6.1x	0.7x
Ceramics	359	360	-1.26	-0.35%	5	16,111	0.2%	16.7	0.5%	NM	1.0x	PUBALIBANK	33,895	0.9%	94.0	3.5x	0.6x
Miscellaneous	4,253	4,261	-8.80	-0.21%	15	230,932	3.5%	202.3	5.6%	41.7x	1.8x	EBL	33,546	0.9%	6.9	5.1x	0.8x
Corporate Bond**	14,205	13,908	+296.22	+2.13%	16	34,163	0.5%	0.1	0.0%	NM	NM	OLYMPIC	31,590	0.9%	4.9	17.2x	2.8x
Treasury Bond**	544	539	+5.70	+1.06%	235	3,007,510	45.4%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
WMSHIPYARD	7.7	+10.0%	2.4	NM	0.5x
RENWICKJA	696.0	+7.3%	0.1	NM	NM
LINDEBD	1,019.5	+6.3%	89.7	2.5x	4.6x
BDTHAI	12.3	+6.0%	21.5	NM	0.4x
SHASHADNIM	18.6	+5.7%	18.0	9.8x	0.4x
ADNTEL	85.2	+4.93%	27.0	15.7x	2.7x
HAKKANIPUL	43.5	+4.8%	10.2	NM	2x
LEGACYFOOT	61.1	+4.8%	41.7	NM	5.5x
MERCINS	25.0	+4.6%	0.1	31.3x	1.3x
GRAMEENS2	14.4	+4.3%	47.3	NM	0.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MITHUNKNIT	13.2	-5.7%	3.0	NM	4.2x
IPDC	18.3	-5.2%	54.2	22.7x	1x
PLFSL	2.2	-4.3%	0.6	NM	NM
ARAMITCEM	11.3	-4.2%	0.3	NM	NM
HRTEX	27.7	-3.8%	5.9	NM	1.3x
KBPPWBIL	139.0	-3.8%	61.2	NM	11.7x
SKTRIMS	15.3	-3.8%	14.6	28.3x	1.0x
DOREENPWR	23.9	-3.6%	4.5	16.0x	0.5x
GHAIL	11.6	-3.3%	13.7	NM	0.9x
PREMIERLEA	3.0	-3.2%	0.0	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.2x	1.5x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	11.3x	3.2x
RENATA	35,002	2.6%	22.8x	2.1x
ISLAMIBANK	33,649	2.5%	16.7x	1.1x
BXPHARMA	32,479	2.4%	6.1x	0.7x
BRACBANK	32,157	2.4%	7.8x	1.2x
GP	30,004	2.2%	12.3x	7.6x
LHB	24,690	1.8%	15.5x	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	2.6x
CITYBANK	16,830	1.2%	4.2x	0.7x
BSRMLTD	14,210	1.0%	4.7x	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%	7.4x	0.7x
ORIONPHARM	11,317	0.8%	45.1x	0.4x
ROBI	10,738	0.8%	27.0x	2.3x

\* 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	426.7	-1.1%	243.3	NM	26.7x
BATBC	367.6	+1.7%	118.5	11.3x	3.2x
RUPALILIFE	109.0	-2.7%	115.4	NM	NM
FINEFOODS	225.3	+2.4%	112.1	NM	18.9x
BSC	94.7	-0.4%	94.4	5.0x	0.9x
PUBALIBANK	29.3	-1.3%	94.0	3.5x	0.6x
CITYBANK	22.4	+1.4%	92.5	4.2x	0.7x
LINDEBD	1,019.5	+6.3%	89.7	2.5x	4.6x
LOVELLO	86.6	+2.4%	87.1	47.2x	6.7x
MIDLANDBNK	31.2	-1.0%	64.3	18.0x	2.2x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
SUNLIFEINS	67.8	67.6	2.0	382	25.85
RELIANCE1	19.0	19.0	7.0	1,099	20.88
LOVELLO	84.5	80.5	5.0	228	19.00
BEACHHATCH	87.0	85.0	5.0	129	11.02
BXPHARMA	81.0	81.0	1.0	120	9.72
BEACONPHAR	140.0	140.0	3.0	69	9.66
FINEFOODS	225.7	221.0	2.0	39	8.73
AIL	93.5	92.0	2.0	65	6.00
IBNSINA	310.0	310.0	1.0	16	4.96
ROBI	25.9	25.9	1.0	170	4.40

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
SUNLIFEINS	67.8	67.6	25.8	382	2
RELIANCE1	19.0	19.0	20.9	1,099	7
LOVELLO	84.5	80.5	19.0	228	5
BEACHHATCH	87.0	85.0	11.0	129	5
BXPHARMA	81.0	81.0	9.7	120	1
BEACONPHAR	140.0	140.0	9.7	69	3
FINEFOODS	225.7	221.0	8.7	39	2
AIL	93.5	92.0	6.0	65	2
IBNSINA	310.0	310.0	5.0	16	1
ROBI	25.9	25.9	4.4	170	1
AL-HAJTEX	116.6	115.0	3.7	32	2
EIL	58.0	57.0	3.5	61	3
BDFINANCE	12.6	12.6	2.5	199	1
AMANFEED	25.3	25.3	1.9	75	1
CITYBANK	22.5	22.5	1.1	50	2
BRACBANK	48.5	48.5	0.9	19	1
RUPALILIFE	112.0	112.0	0.9	8	1
NRBBANK	13.2	13.2	0.8	58	1
SPCERAMICS	13.0	13.0	0.7	50	1
BSCPLC	115.8	115.8	0.6	6	1
GHAIL	12.7	12.7	0.6	50	1
POWERGRID	45.1	45.1	0.6	14	1
<b>Total</b>			<b>140.6</b>		<b>50</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

**Important DSE News**

**BIFC**

The Board of Directors has recommended No dividend for the year ended December 31, 2023. Date, time and venue of AGM: To be notified later. Record Date: 06.02.2025. The Company has also reported EPS of Tk. (5.66), NAV per share of Tk. (119.45) and NOCFPS of Tk. (0.78) for the year ended December 31, 2023 as against Tk. (7.58), Tk. (114.42) and Tk. (2.12) respectively for the year ended December 31, 2022.

**(Q1 Un-audited):** EPS was Tk. (0.94) for January-March 2024 as against Tk. (1.47) for January-March 2023. NOCFPS was Tk. (0.06) for January-March 2024 as against Tk. (1.20) for January-March 2023. NAV per share was Tk. (120.39) as on March 31, 2024 and Tk. (115.89) as on March 31, 2023.

**(Q2 Un-audited):** EPS was Tk. (0.61) for April-June 2024 as against Tk. (0.90) for April-June 2023. EPS was Tk. (1.55) for January-June 2024 as against Tk. (2.37) for January-June 2023. NOCFPS was Tk. 0.26 for January-June 2024 as against Tk. (2.20) for January-June 2023. NAV per share was Tk. (121.00) as on June 30, 2024 and Tk. (116.79) as on June 30, 2023.

**(Q3 Un-audited):** EPS was Tk. (1.06) for July-September 2024 as against Tk. (1.06) for July-September 2023; EPS was Tk. (2.61) for January-September 2024 as against Tk. (3.44) for January-September 2023. NOCFPS was Tk. 0.12 for January-September 2024 as against Tk. (3.09) for January-September 2023. NAV per share was Tk. (122.06) as on September 30, 2024 and Tk. (117.85) as on September 30, 2023.

**DACCADYE**

**(Q1 Un-audited):** EPS was Tk. (0.44) for July-September 2024 as against Tk. (0.42) for July-September 2023; NOCFPS was Tk. 0.23 for July-September 2024 as against Tk. 0.40 for July-September 2023. NAV per share was Tk. 31.10 as on September 30, 2024 and Tk. 31.51 as on June 30, 2024.

**ICB**

Bangladesh Development Bank PLC., a Corporate Sponsor Director of the Company, has further informed that it has completed its sale of 15,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange PLC. as per declaration disseminated on 23.12.2024.

**GENEXIL**

The company will be placed in 'B' category from existing 'A' category with effect from January 01, 2025 as the company has approved 3% Cash Dividend for the year ended June 30, 2024.

**SAIFPOWER**

The company will be placed in 'B' category from existing 'A' category with effect from January 01, 2025 as the company has approved 1% Cash Dividend for the year ended June 30, 2024.

**BEXIMCO**

The company will be placed in 'B' category from existing 'A' category with effect from January 01, 2025 as the company has approved 5% Stock Dividend for the year ended June 30, 2024.

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