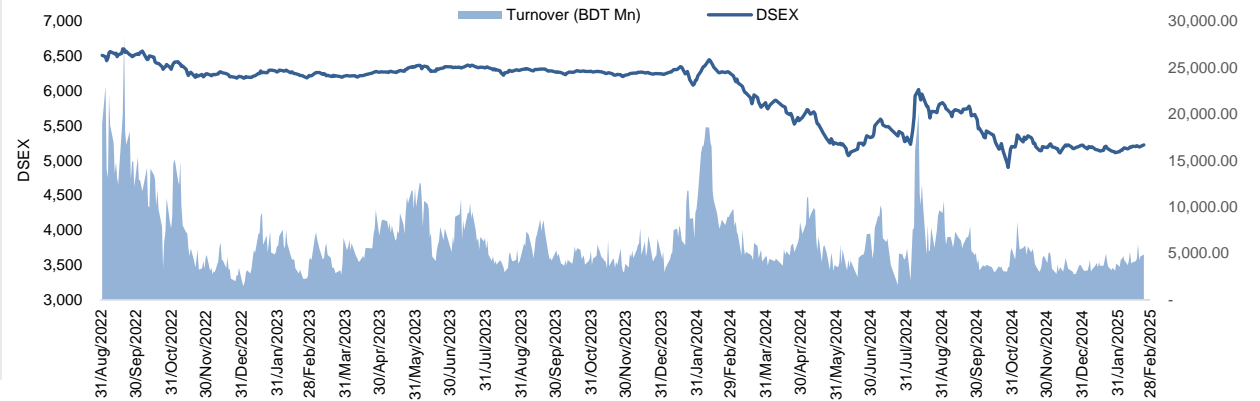


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.46%) gained 24 points and closed at 5,224.37. The blue-chip index DS30 (+0.58%), the Shariah-based index DSES (+0.27%), and the large-cap index CDSET (+0.27%) closed at 1,921.06, 1,166.10, and 1,054.74 points, respectively. All the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 1.24% followed by Fuel & Power (+0.71%), Engineering (+0.35%), NBF1 (+0.34%), Pharmaceutical (+0.27%), Bank (+0.17%), and Telecommunication (+0.08%), respectively. Block trades contributed 1.7% of the overall market turnover. Grameenphone Ltd. (+0.2%) was the most traded share with a turnover of BDT 231 million.



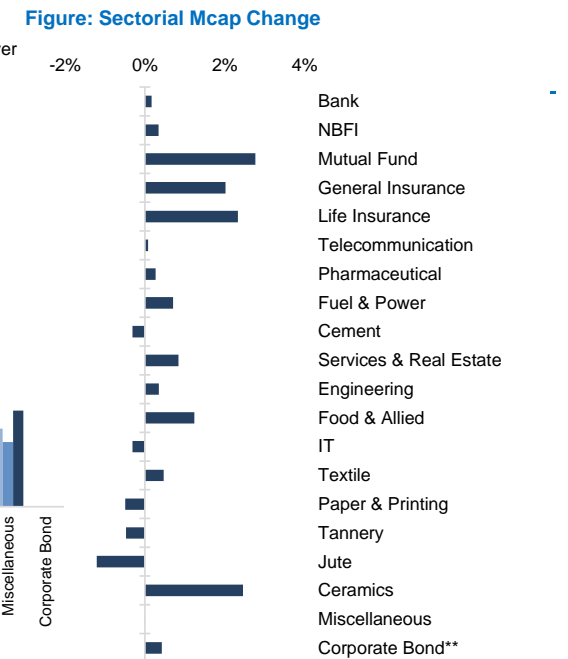
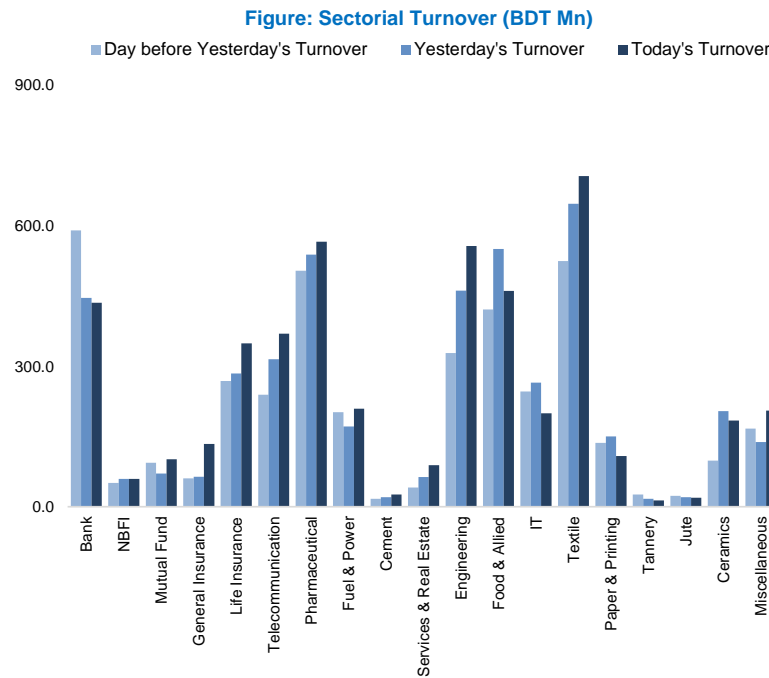
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,224.37	5,200.37	+24.00	+0.46%	+0.2%
DS30	1,921.06	1,909.89	+11.16	+0.58%	-1.0%
DSES	1,166.10	1,162.92	+3.19	+0.27%	-0.2%
CDSET	1,054.74	1,051.93	+2.81	+0.27%	-1.1%

	Advanced	Declined	Unchanged	Total
All Category	217	124	57	398
A Category (Equity)	138	53	27	218
B Category (Equity)	44	27	9	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	35	44	21	100
Mutual Funds	33	1	3	37
Corporate Bonds	1	0	1	2
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,960,497	6,951,916	+0.1%
Mn USD	57,053	56,983	
Turnover			
Mn BDT	4,876	4,657	+4.7%
Mn USD	40	38	
Volume			
Mn Shares	206	189	+9.2%
No. of Trade	156,410	141,912	+10.2%

* Based on Traded Scrips

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Market PE 15.0x
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	1,434	1,431	+2.44	+0.17%	36	678,425	9.7%	435.6	9.1%	8.8x	0.7x	GP	467,744	13.0%	231.3	12.9x	7.2x
NBFI	1,078	1,074	+3.70	+0.34%	23	102,708	1.5%	59.5	1.2%	NM	NM	SQURPHARMA	191,562	5.3%	34.0	8.6x	1.5x
Mutual Fund	585	569	+15.74	+2.76%	37	26,892	0.4%	101.2	2.1%	NM	0.5x	BATBC	186,732	5.2%	37.6	10.7x	3.2x
General Insurance	2,614	2,562	+51.78	+2.02%	43	74,624	1.1%	134.0	2.8%	13.2x	1.1x	ROBI	151,376	4.2%	122.9	21.6x	2.2x
Life Insurance	1,830	1,788	+41.65	+2.33%	15	48,674	0.7%	348.8	7.3%	NM	NM	WALTONHIL	144,254	4.0%	4.9	10.9x	1.3x
Telecommunication	5,484	5,480	+4.39	+0.08%	3	643,061	9.2%	369.7	7.7%	14.4x	4.3x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,882	2,874	+7.68	+0.27%	34	546,290	7.8%	565.8	11.8%	13.2x	1.5x	BRACBANK	93,087	2.6%	48.2	8.4x	1.2x
Fuel & Power	1,108	1,100	+7.78	+0.71%	23	293,489	4.2%	209.1	4.4%	16.7x	0.6x	BERGERPBL	83,322	2.3%	0.2	24.3x	5.7x
Cement	1,840	1,845	-5.72	-0.31%	7	87,663	1.3%	26.2	0.5%	16.9x	1.9x	MARICO	76,224	2.1%	0.0	13.6x	10.0x
Services & Real Estate	1,007	999	+8.39	+0.84%	9	55,381	0.8%	88.8	1.9%	19.7x	0.4x	UPGDCL	71,187	2.0%	2.5	6.7x	1.9x
Engineering	2,510	2,501	+8.77	+0.35%	42	283,171	4.1%	557.1	11.6%	12.8x	0.9x	RENATA	59,023	1.6%	4.2	20.0x	1.7x
Food & Allied	16,449	16,248	+201.45	+1.24%	21	300,980	4.3%	460.7	9.6%	16.4x	4.5x	LHB	58,069	1.6%	14.7	14.4x	2.9x
IT	2,028	2,035	-6.35	-0.31%	11	26,753	0.4%	199.4	4.2%	20.8x	1.7x	UNILEVERCL	48,523	1.3%	0.1	66.0x	20.7x
Textile	1,182	1,177	+5.53	+0.47%	58	123,122	1.8%	706.1	14.7%	74.0x	0.8x	DUTCHBANGL	45,611	1.3%	3.4	7.3x	0.9x
Paper & Printing	4,277	4,298	-21.06	-0.49%	6	19,323	0.3%	108.4	2.3%	NM	0.9x	ICB	44,490	1.2%	9.1	35.1x	1.0x
Tannery	1,948	1,957	-9.30	-0.48%	6	21,704	0.3%	13.7	0.3%	NM	1.6x	EBL	35,447	1.0%	6.2	5.4x	0.8x
Jute	12,283	12,433	-149.85	-1.21%	3	2,704	0.0%	19.4	0.4%	NM	NM	BXPHARMA	34,708	1.0%	13.1	5.4x	0.7x
Ceramics	401	392	+9.63	+2.46%	5	17,999	0.3%	184.1	3.8%	NM	1.1x	PUBALIBANK	33,548	0.9%	22.0	3.5x	0.6x
Miscellaneous	4,275	4,275	-0.21	-0.00%	15	232,161	3.3%	205.2	4.3%	95.0x	1.9x	POWERGRID	33,080	0.9%	7.3	NM	0.3x
Corporate Bond**	15,328	15,263	+64.60	+0.42%	16	33,571	0.5%	0.1	0.0%	NM	NM	CITYBANK	31,101	0.9%	75.4	4.3x	0.8x
Treasury Bond**	1,304	1,275	+28.90	+2.27%	235	3,341,329	48.0%	0.7	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SALAMCRST	16.9	+9.7%	1.5	NM	0.9x
EXIM1STMF	3.4	+9.7%	5.7	NM	0.4x
SANDHANINS	21.7	+9.6%	25.8	NM	NM
SPCERAMICS	16.1	+9.5%	103.7	NM	0.5x
PADMALIFE	19.6	+9.5%	6.1	NM	NM
BPPL	11.7	+9.35%	29.8	NM	0.4x
YPL	14.1	+9.3%	15.3	NM	3x
BARKAPOWER	10.7	+9.2%	28.3	25.5x	0.5x
SAFKOSPINN	10.1	+8.6%	2.7	NM	NM
FUWANGFOOD	16.7	+8.4%	135.1	NM	8.0x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	108,958	7.7%	8.6x	1.5x
ISLAMIBANK	74,730	5.3%	14.9x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.7x	3.2x
WALTONHIL	46,773	3.3%	10.9x	1.3x
BRACBANK	46,489	3.3%	8.4x	1.2x
GP	44,708	3.2%	12.9x	7.2x
RENATA	32,968	2.3%	20.0x	1.7x
BXPHARMA	23,409	1.7%	5.4x	0.7x
PUBALIBANK	22,905	1.6%	3.5x	0.6x
CITYBANK	21,020	1.5%	4.3x	0.8x
LHB	20,953	1.5%	14.4x	2.9x
OLYMPIC	20,496	1.5%	16.2x	2.6x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GP	346.4	+0.2%	231.3	12.9x	7.2x
ORIONINFU	393.4	+4.5%	220.6	NM	25.7x
FUWANGFOOD	16.7	+8.4%	135.1	NM	8.0x
MALEKSPIN	27.5	+5.0%	132.9	3.6x	0.5x
ROBI	28.9	-	122.9	21.6x	2.2x
SUNLIFEINS	73.7	-2.3%	106.6	NM	NM
SPCERAMICS	16.1	+9.5%	103.7	NM	0.5x
BDTHAI	16.1	+5.2%	94.5	NM	0.6x
MIDLANDBNK	22.4	-2.6%	77.4	12.9x	1.6x
CITYBANK	23.0	-0.9%	75.4	4.3x	0.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ATLASBANG	50.0	-5.5%	0.2	NM	0.4x
RINGSHINE	4.1	-4.7%	2.5	NM	NM
RELIANCE1	20.9	-4.6%	13.4	NM	2.0x
NEWLINE	11.2	-4.3%	24.7	NM	0.5x
KPPL	25.7	-3.7%	26.1	NM	NM
HAMI	107.5	-3.7%	1.9	NM	11.8x
IBP	10.7	-3.6%	2.5	NM	0.8x
UNIONCAP	6.2	-3.1%	1.3	NM	NM
GENNEXT	3.3	-2.9%	3.3	NM	0.3x
EMERALDOIL	23.2	-2.9%	8.3	19.8x	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
ALARABANK	18,282	1.3%	13.3x	1.0x
BEACONPHAR	17,838	1.3%	50.4x	4.4x
PRIMEBANK	16,142	1.1%	4.5x	0.7x
ROBI	14,876	1.1%	21.6x	2.2x
UTTARABANK	13,699	1.0%	8.8x	0.8x
NBL	13,055	0.9%	NM	2.5x
BSRMLTD	12,852	0.9%	5.3x	0.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
JAMUNABANK	21.2	21.2	1.0	810	17.17
ACI	155.8	155.8	3.0	46	7.24
GPHISPAT	23.1	23.1	1.0	250	5.78
ORIONINFU	377.0	377.0	1.0	14	5.28
NRBBANK	14.7	14.7	1.0	317	4.66
NLTUBES	86.0	74.5	3.0	54	4.39
NBL	4.2	4.2	1.0	1,000	4.20
BEACHHATCH	110.8	109.0	2.0	35	3.83
ACFL	18.9	18.9	1.0	200	3.78
BEACONPHAR	126.4	126.4	2.0	23	2.95

* 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	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
JAMUNABANK	21.2	21.2	17.2	810	1
ACI	155.8	155.8	7.2	46	3
GPHISPAT	23.1	23.1	5.8	250	1
ORIONINFU	377.0	377.0	5.3	14	1
NRBBANK	14.7	14.7	4.7	317	1
NLTUBES	86.0	74.5	4.4	54	3
NBL	4.2	4.2	4.2	1,000	1
BEACHHATCH	110.8	109.0	3.8	35	2
ACFL	18.9	18.9	3.8	200	1
BEACONPHAR	126.4	126.4	3.0	23	2
MIRAKHTER	35.4	35.4	2.6	73	5
SUNLIFEINS	76.2	67.9	2.2	30	2
CAPITECGBF	6.7	6.7	2.1	319	2
NATLIFEINS	91.7	91.7	1.6	17	1
DSSL	11.8	11.8	1.5	127	1
MIDLANDBNK	25.3	25.3	1.5	58	1
GEMINISEA	143.5	143.5	1.4	10	1
BDTHAI	14.2	14.2	1.4	100	1
ACMEPL	15.0	15.0	1.1	70	1
GQBALLPEN	157.0	157.0	1.0	6	2
EIL	50.2	50.2	1.0	20	1
ONEBANKPLC	9.3	9.3	0.9	100	1
Total			82.3		43

Important DSE News
FEDERALINS

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Federal Insurance PLC' instead of 'Federal Insurance Company Ltd.' with effect from February 24, 2025. Other things (except name) will remain unchanged.

BSC

The company has informed that the project of 6 container vessels (2,500-3,000 TEUs each) has been primarily approved by the Planning Commission. These ships will be acquired from South Korea at a cost of US \$330.32 million (approx.). For this purpose, a concept paper has been signed between EDCF, Korea and BSC; under which EDCF is conducting feasibility study of the project. The project will be accomplished subject to the approval of EDCF, Korea. Moreover, initiative for another project of 6 container vessels (2,800 - 3,000 TEUs each) has been taken.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
GP		0.0%	170.0%	Record Date	26-Feb-25
BATBC		0.0%	150.0%	Record Date	26-Feb-25
SIPLC		0.0%	15.0%	Record Date	27-Feb-25
CITYGENINS		0.0%	10.0%	Record Date	27-Feb-25
CRYSTALINS		0.0%	12.0%	Record Date	2-Mar-25
RELIANCINS		0.0%	30.0%	Record Date	3-Mar-25
GREENDELTA		0.0%	25.0%	Record Date	4-Mar-25
SUMITPOWER		0.0%	10.0%	Record Date	10-Mar-25
ROBI		0.0%	15.0%	Record Date	16-Mar-25

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