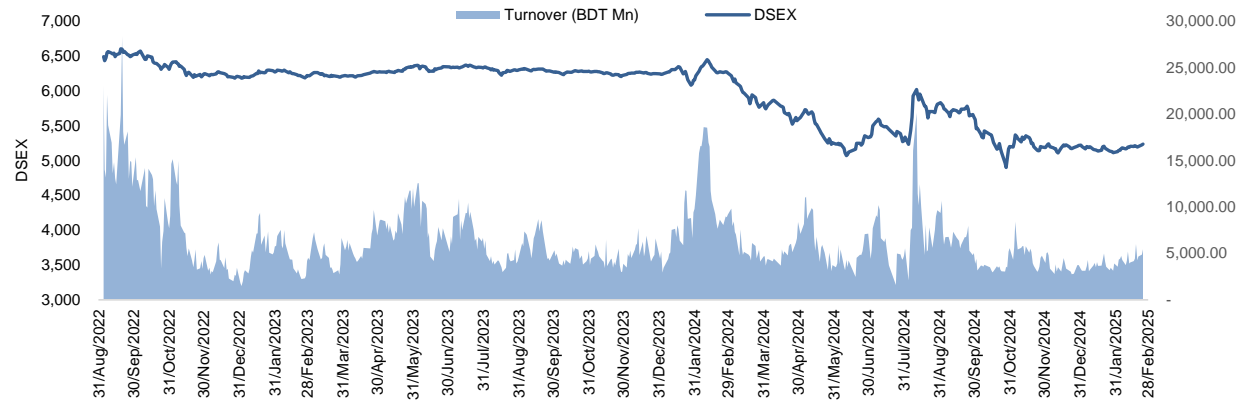


**Daily Market Update**

The market closed in green today. The benchmark index DSEX (+0.20%) gained 10.57 points and closed at 5,234.95. The blue-chip index DS30 (+0.28%), the Shariah-based index DSES (+0.26%), and the large-cap index CDSET (+0.09%) closed at 1,926.50, 1,169.10, and 1,055.67 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 1.61%, followed by Pharmaceutical (+0.13%), Engineering (+0.04%), Bank (+0.04%), Food & Allied (-0.09%), Fuel & Power (-0.16%), and Telecommunication (-0.29%), respectively. Block trades contributed 2.9% of the overall market turnover. Orion Infusion Ltd. (-2.2%) was the most traded share with a turnover of BDT 167 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,234.95	5,224.37	+10.57	+0.20%	+0.4%
DS30	1,926.50	1,921.06	+5.44	+0.28%	-0.7%
DSES	1,169.10	1,166.10	+3.00	+0.26%	+0.0%
CDSET	1,055.67	1,054.74	+0.93	+0.09%	-1.0%

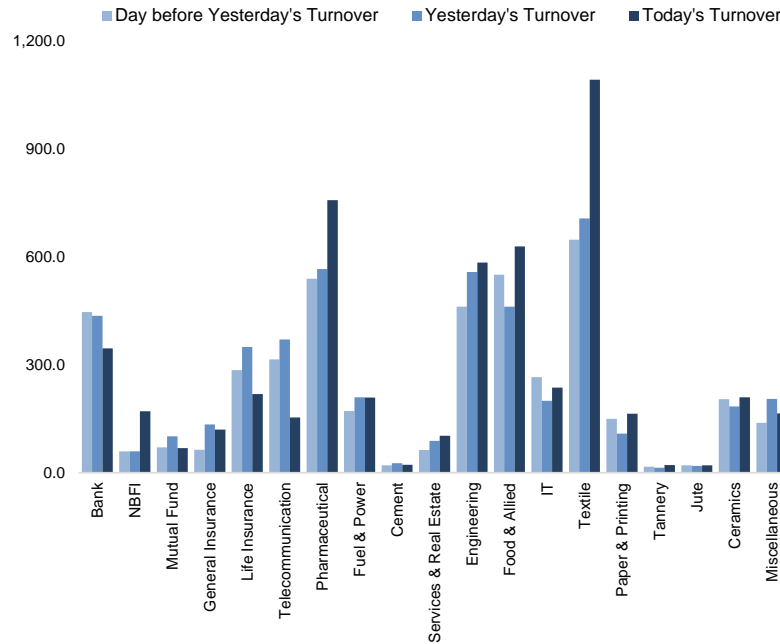
	Advanced	Declined	Unchanged	Total
<b>All Category</b>	173	154	71	398
<b>A Category (Equity)</b>	75	95	48	218
<b>B Category (Equity)</b>	44	31	5	80
<b>N Category (Equity)</b>	0	0	0	0
<b>Z Category (Equity)</b>	54	28	18	100
<b>Mutual Funds</b>	5	13	19	37
<b>Corporate Bonds</b>	1	1	0	2
<b>Treasury Bonds</b>	0	1	0	1

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	6,965,304	6,960,497	+0.1%
Mn USD	57,093	57,053	
<b>Turnover</b>			
Mn BDT	5,443	4,876	+11.6%
Mn USD	45	40	
<b>Volume</b>			
Mn Shares	232	206	+12.6%
<b>No. of Trade</b>	166,758	156,410	+6.6%

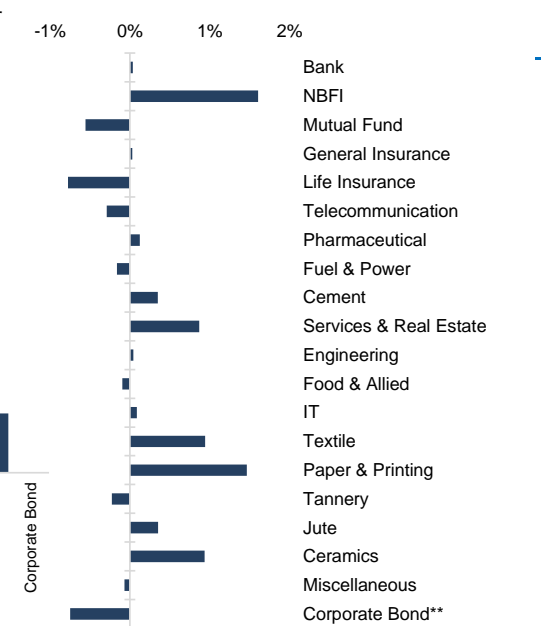
\* Average Interbank Exchange Rate is BDT 122.00 as of Feb 24, 2025

<b>Fahim Hassan</b> Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	<b>Md Istiaz Uddin</b> Research Associate (880) 1708805202 mistiaz.uddin@bracepl.com
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**Figure: Sectorial Turnover (BDT Mn)**



**Figure: Sectorial Mcap Change**



**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	1,434	+0.52	+0.04%	36	678,669	9.7%	345.6	6.5%	8.8x	0.7x	GP	465,718	12.9%	76.1	12.8x	7.2x
NBFI	1,095	1,078	+17.33	+1.61%	23	104,359	1.5%	170.6	3.2%	NM	NM	SQURPHARMA	191,296	5.3%	123.7	8.5x	1.5x
Mutual Fund	582	585	-3.25	-0.56%	37	26,743	0.4%	68.7	1.3%	NM	0.5x	BATBC	186,624	5.2%	40.4	10.7x	3.2x
General Insurance	2,615	2,614	+0.77	+0.03%	43	74,646	1.1%	119.9	2.3%	13.3x	1.1x	ROBI	151,376	4.2%	68.2	21.6x	2.2x
Life Insurance	1,816	1,830	-14.20	-0.78%	15	48,296	0.7%	218.0	4.1%	NM	NM	WALTONHIL	143,770	4.0%	5.8	10.9x	1.3x
Telecommunication	5,468	5,484	-15.84	-0.29%	3	641,204	9.2%	153.3	2.9%	14.3x	4.3x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,885	2,882	+3.61	+0.13%	34	546,975	7.9%	757.0	14.3%	13.2x	1.5x	BRACBANK	94,503	2.6%	55.3	8.5x	1.3x
Fuel & Power	1,106	1,108	-1.78	-0.16%	23	293,018	4.2%	208.9	4.0%	16.6x	0.6x	BERGERPBL	83,309	2.3%	0.1	24.3x	5.7x
Cement	1,846	1,840	+6.41	+0.35%	7	87,969	1.3%	21.8	0.4%	16.9x	1.9x	MARICO	75,187	2.1%	15.9	13.4x	9.9x
Services & Real Estate	1,016	1,007	+8.74	+0.87%	9	55,862	0.8%	102.6	1.9%	19.8x	0.4x	UPGDCL	71,129	2.0%	1.9	6.7x	1.9x
Engineering	2,511	2,510	+1.08	+0.04%	42	283,293	4.1%	583.8	11.0%	12.9x	0.9x	RENATA	58,965	1.6%	4.8	19.9x	1.7x
Food & Allied	16,434	16,449	-15.32	-0.09%	21	300,700	4.3%	628.2	11.9%	16.3x	4.5x	LHB	58,185	1.6%	7.5	14.4x	2.9x
IT	2,030	2,028	+1.76	+0.09%	11	26,776	0.4%	236.1	4.5%	20.8x	1.7x	UNILEVERCL	48,485	1.3%	0.1	66.0x	20.6x
Textile	1,193	1,182	+11.15	+0.94%	58	124,284	1.8%	1,091.0	20.6%	74.7x	0.8x	DUTCHBANGL	45,699	1.3%	3.9	7.3x	0.9x
Paper & Printing	4,340	4,277	+62.70	+1.47%	6	19,606	0.3%	164.2	3.1%	NM	0.9x	ICB	44,751	1.2%	7.4	35.3x	1.0x
Tannery	1,944	1,948	-4.39	-0.23%	6	21,655	0.3%	21.0	0.4%	NM	1.6x	EBL	35,312	1.0%	4.3	5.4x	0.8x
Jute	12,327	12,283	+43.49	+0.35%	3	2,713	0.0%	20.4	0.4%	NM	NM	BXPHARMA	35,020	1.0%	18.2	5.5x	0.7x
Ceramics	405	401	+3.75	+0.93%	5	18,168	0.3%	209.4	4.0%	NM	1.1x	PUBALIBANK	33,432	0.9%	5.7	3.5x	0.6x
Miscellaneous	4,272	4,275	-2.90	-0.07%	15	232,004	3.3%	164.6	3.1%	94.9x	1.9x	POWERGRID	32,714	0.9%	4.9	NM	0.3x
Corporate Bond**	15,213	15,328	-114.82	-0.75%	16	33,319	0.5%	0.1	0.0%	NM	NM	CITYBANK	31,101	0.9%	26.5	4.3x	0.8x
Treasury Bond**	1,337	1,304	+33.17	+2.54%	235	3,344,558	48.0%	0.2	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KTL	13.4	+9.8%	95.8	NM	0.9x
BPML	31.3	+9.8%	16.1	NM	0.4x
DESHBANDHU	21.3	+9.8%	44.6	NM	1.2x
SANDHANINS	23.8	+9.7%	58.2	NM	NM
SALAMCRST	18.5	+9.5%	1.4	NM	1.0x
ISLAMICFIN	11.7	+9.35%	26.1	NM	2.7x
SPCERAMICS	17.6	+9.3%	99.3	NM	1x
MHSML	15.9	+8.9%	21.8	20.9x	0.8x
ZAHEENSPIN	8.7	+6.1%	33.8	NM	2.2x
COPPERTECH	21.6	+5.9%	19.4	25.1x	1.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	108,958	7.7%	8.5x	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%	8.5x	1.3x
GP	44,708	3.2%	12.8x	7.2x
RENATA	32,968	2.3%	19.9x	1.7x
BXPHARMA	23,409	1.7%	5.5x	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%	16.0x	2.5x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	384.8	-2.2%	167.4	NM	25.1x
BEACHHATCH	112.0	+2.3%	151.9	32.8x	7.4x
SQURPHARMA	215.8	-0.1%	123.7	8.5x	1.5x
FUWANGFOOE	16.9	+1.2%	117.6	NM	8.1x
DSSL	12.4	+4.2%	108.2	41.3x	0.7x
SPCERAMICS	17.6	+9.3%	99.3	NM	0.6x
LOVELLO	85.4	-0.6%	98.4	38.5x	6.8x
KTL	13.4	+9.8%	95.8	NM	0.9x
AGNISYSL	28.0	+1.1%	94.0	18.8x	1.6x
FEKDIL	18.8	+2.2%	90.4	6.8x	0.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MEGHNACEM	44.0	-7.2%	1.7	NM	1.6x
KPPL	24.5	-4.7%	48.9	NM	NM
SUNLIFEINS	71.2	-3.4%	53.8	NM	NM
ICBIBANK	2.9	-3.3%	0.1	NM	NM
IFIC1STMF	3.1	-3.1%	0.4	NM	0.3x
FBFIF	3.1	-3.1%	3.4	NM	0.3x
ICBAGRANI1	6.4	-3.0%	0.5	NM	0.8x
ABB1STMF	3.2	-3.0%	1.7	NM	0.3x
SEMILLECMF	6.7	-2.9%	0.0	NM	0.7x
AIL	78.5	-2.8%	32.0	29.5x	3.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	111.2	104.0	9.0	358	37.47
LOVELLO	94.0	80.0	4.0	306	26.13
SUNLIFEINS	81.0	81.0	2.0	320	25.92
PEOPLESINS	31.2	31.2	2.0	792	24.71
ACI	155.8	155.8	3.0	46	7.24
NBL	4.2	4.2	1.0	1,000	4.20
RELIANCE1	20.1	20.0	3.0	209	4.19
TECHNODRUG	37.1	37.0	2.0	100	3.71
BRACBANK	53.0	52.9	2.0	67	3.55
GPHISPAT	23.2	23.2	1.0	150	3.48

\* 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
BEACHHATCH	111.2	104.0	37.5	358	9
LOVELLO	94.0	80.0	26.1	306	4
SUNLIFEINS	81.0	81.0	25.9	320	2
PEOPLESINS	31.2	31.2	24.7	792	2
ACI	155.8	155.8	7.2	46	3
NBL	4.2	4.2	4.2	1,000	1
RELIANCE1	20.1	20.0	4.2	209	3
TECHNODRUG	37.1	37.0	3.7	100	2
BRACBANK	53.0	52.9	3.6	67	2
GPHISPAT	23.2	23.2	3.5	150	1
BBSCABLES	20.1	20.1	3.0	150	1
NRBBANK	13.0	13.0	2.6	200	1
MIDLANDBNK	23.1	23.1	2.4	104	1
GP	316.1	316.1	1.6	5	1
AL-HAJTEX	140.0	140.0	1.4	10	1
VFSTDL	9.4	9.4	1.1	115	1
SIMTEX	20.4	20.4	1.0	50	1
ASIATICLAB	40.5	40.5	0.8	20	1
GEMINISEA	156.9	156.9	0.7	4	1
NAVANAPHAR	52.1	52.1	0.6	12	1
FEKDIL	18.3	18.3	0.5	30	1
MONNOFABR	18.8	18.8	0.5	29	1
<b>Total</b>			<b>157.4</b>		<b>42</b>

**Important DSE News**
**PREMIERLEA**

The company has informed that 919,301 shares of Late Zarina Begum, a sponsor shareholder of the company who passed away on 04.08.2019, will be transmitted among her successors according to the Succession Certificate issued by the Honorable Court.

**NPOLYMER**

The company has informed that the Bangladesh Securities and Exchange Commission is not in a position to accord consent to the application of National Polymer Industries PLC. for issuance of redeemable, cumulative, non-convertible and non-participative preference shares amounting Tk. 1,000 million through private offer.

**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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