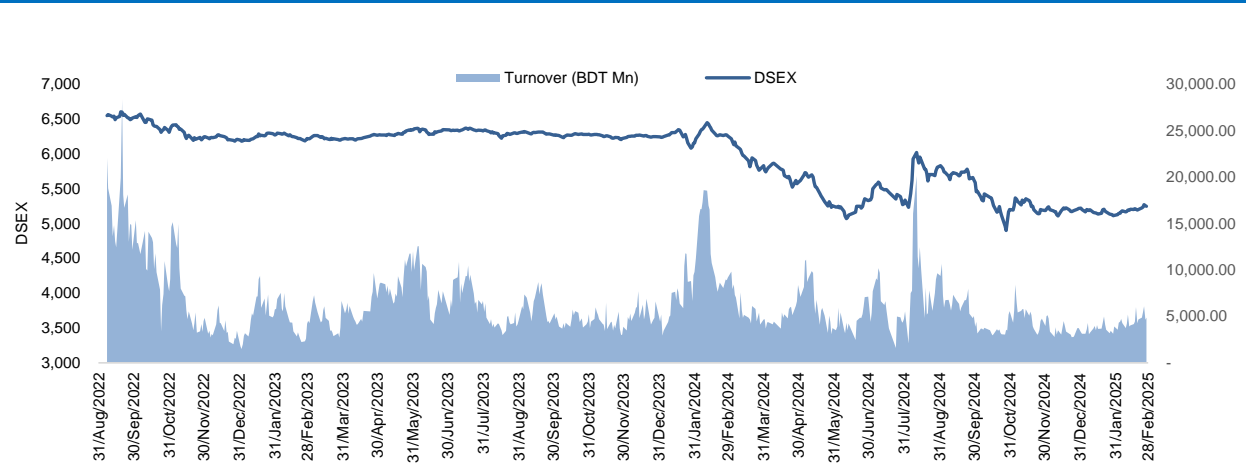


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.12%) lost 6.49 points and closed at 5,247.30. The blue-chip index DS30 (-1.07%), the Shariah-based index DSES (-0.57%), and the large-cap index CDSET (-0.70%) closed at 1,905.55, 1,167.00, and 1,050.91 points, respectively. Most of the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 3.42% followed by Food & Allied (-2.52%), Fuel & Power (-0.23%), Pharmaceutical (-0.17%), Bank (-0.02%), Engineering (+0.50%), and NBFi (+1.95%), respectively. Block trades contributed 3.0% of the overall market turnover. Orion Infusion Ltd. (+2.3%) was the most traded share with a turnover of BDT 196 million.



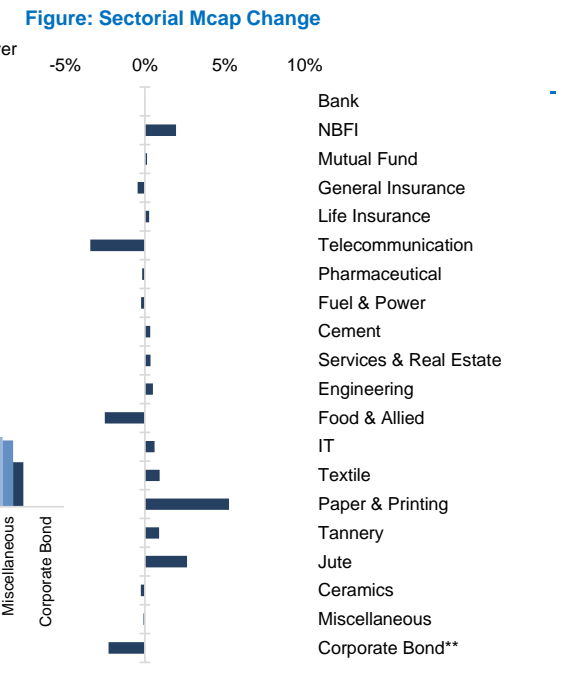
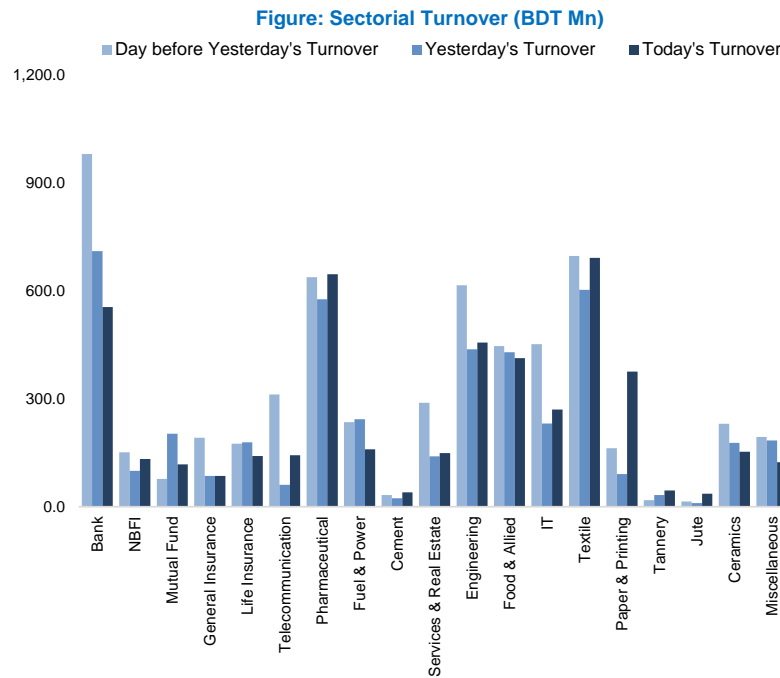
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,247.30	5,253.79	-6.49	-0.12%	+0.6%
DS30	1,905.55	1,926.19	-20.64	-1.07%	-1.8%
DSES	1,167.00	1,173.71	-6.71	-0.57%	-0.2%
CDSET	1,050.91	1,058.35	-7.44	-0.70%	-1.4%

	Advanced	Declined	Unchanged	Total
All Category	193	133	73	399
A Category (Equity)	88	84	48	220
B Category (Equity)	45	28	7	80
N Category (Equity)	0	0	0	0
Z Category (Equity)	60	21	18	99
Mutual Funds	12	11	14	37
Corporate Bonds	0	3	2	5
Treasury Bonds	0	1	0	1

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,953,642	6,937,999	+0.2%
Mn USD	56,997	56,869	
Turnover			
Mn BDT	4,879	4,634	+5.3%
Mn USD	40	38	
Volume			
Mn Shares	204	214	-4.4%
No. of Trade	161,470	144,797	+11.5%

* Average Interbank Exchange Rate is BDT 122.00 as of Feb 27, 2025

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Market PE 14.9x
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	1,452	1,453	-0.36	-0.02%	36	687,149	9.9%	554.3	11.7%	8.9x	0.7x	GP	443,168	12.4%	66.3	12.2x	6.8x
NBFI	1,111	1,090	+21.23	+1.95%	23	105,856	1.5%	132.6	2.8%	NM	NM	SQURPHARMA	191,917	5.4%	27.3	8.6x	1.5x
Mutual Fund	585	584	+0.77	+0.13%	37	26,891	0.4%	117.9	2.5%	NM	0.5x	BATBC	180,360	5.0%	75.7	10.3x	3.1x
General Insurance	2,602	2,614	-11.82	-0.45%	43	74,290	1.1%	85.6	1.8%	13.2x	1.1x	ROBI	149,281	4.2%	64.4	21.3x	2.2x
Life Insurance	1,775	1,771	+4.77	+0.27%	15	47,221	0.7%	141.0	3.0%	NM	NM	WALTONHIL	142,558	4.0%	2.8	10.8x	1.3x
Telecommunication	5,259	5,445	-186.45	-3.42%	3	616,634	8.9%	142.6	3.0%	13.8x	4.1x	BEXIMCO	103,850	2.9%	0.1	NM	1.3x
Pharmaceutical	2,883	2,888	-5.02	-0.17%	34	546,544	7.9%	645.2	13.6%	13.2x	1.5x	BRACBANK	92,556	2.6%	41.0	8.4x	1.2x
Fuel & Power	1,106	1,108	-2.54	-0.23%	23	292,865	4.2%	159.3	3.4%	16.0x	0.6x	BERGERPBL	83,346	2.3%	1.7	24.3x	5.7x
Cement	1,856	1,850	+6.05	+0.33%	7	88,435	1.3%	40.1	0.8%	17.0x	1.9x	MARICO	74,702	2.1%	16.4	13.3x	9.8x
Services & Real Estate	1,040	1,036	+3.63	+0.35%	9	57,181	0.8%	149.0	3.1%	20.3x	0.4x	ISLAMIBANK	72,128	2.0%	23.3	15.4x	1.0x
Engineering	2,511	2,499	+12.58	+0.50%	42	283,307	4.1%	455.5	9.6%	12.9x	0.9x	RENATA	58,300	1.6%	8.5	19.7x	1.7x
Food & Allied	16,062	16,477	-414.79	-2.52%	21	293,890	4.2%	412.3	8.7%	16.0x	4.4x	LHB	58,185	1.6%	26.5	14.4x	2.9x
IT	2,093	2,080	+12.49	+0.60%	11	27,601	0.4%	269.8	5.7%	21.4x	1.8x	UNILEVERCL	48,326	1.3%	0.9	65.8x	20.6x
Textile	1,194	1,183	+10.98	+0.93%	58	124,388	1.8%	690.9	14.6%	80.0x	0.8x	ICB	46,225	1.3%	20.2	36.5x	1.1x
Paper & Printing	4,865	4,621	+243.69	+5.27%	6	21,977	0.3%	375.3	7.9%	NM	1.0x	DUTCHBANGL	45,611	1.3%	3.0	7.3x	0.9x
Tannery	1,976	1,958	+17.43	+0.89%	6	22,011	0.3%	45.5	1.0%	NM	1.6x	EBL	35,312	1.0%	5.3	5.4x	0.8x
Jute	12,786	12,457	+328.78	+2.64%	3	2,814	0.0%	36.1	0.8%	NM	NM	BXPBARMA	35,064	1.0%	27.8	5.5x	0.7x
Ceramics	406	407	-1.06	-0.26%	5	18,192	0.3%	152.7	3.2%	NM	1.1x	PUBALIBANK	34,127	1.0%	8.1	3.6x	0.6x
Miscellaneous	4,271	4,275	-3.36	-0.08%	15	231,945	3.3%	123.5	2.6%	94.9x	1.9x	POWERGRID	32,623	0.9%	3.2	NM	0.3x
Corporate Bond**	15,054	15,405	-350.76	-2.28%	16	32,972	0.5%	1.1	0.0%	NM	NM	CITYBANK	30,965	0.9%	29.2	4.3x	0.8x
Treasury Bond**	1,440	1,388	+51.62	+3.72%	235	3,350,999	48.2%	1.1	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ARAMITCEM	16.5	+10.0%	1.8	NM	NM
BDLAMPS	120.0	+10.0%	10.9	NM	2.5x
HRTEX	36.4	+10.0%	52.3	NM	2.0x
STYLECRAFT	61.8	+10.0%	22.8	NM	10.7x
BPML	41.5	+9.8%	119.0	NM	0.6x
SALAMCRST	23.6	+9.77%	36.9	NM	1.3x
MITHUNKNIT	16.9	+9.7%	7.0	NM	5x
RSRMSTEEL	12.4	+9.7%	0.7	NM	0.3x
PRIMETEX	15.8	+9.7%	3.5	NM	0.2x
PENINSULA	13.6	+9.7%	15.4	NM	0.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DESHBANDHU	21.7	-5.2%	38.6	NM	1.3x
GP	328.2	-4.6%	66.3	12.2x	7x
GHAIL	13.0	-3.7%	30.7	NM	1.0x
BATBC	334.0	-3.7%	75.7	10.3x	3.1x
PHPMF1	3.0	-3.2%	0.5	NM	0.3x
HAMI	102.6	-3.2%	1.8	NM	11.3x
NITOLINS	24.3	-3.2%	0.9	20.1x	0.8x
IFIC1STMF	3.1	-3.1%	0.2	NM	0.3x
EXIM1STMF	3.3	-2.9%	4.0	NM	0.4x
PREMIERLEA	3.4	-2.9%	0.0	NM	NM

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%	15.4x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.3x	3.1x
WALTONHIL	46,773	3.3%	10.8x	1.3x
BRACBANK	46,489	3.3%	8.4x	1.2x
GP	44,708	3.2%	12.2x	6.8x
RENATA	32,968	2.3%	19.7x	1.7x
BXPBARMA	23,409	1.7%	5.5x	0.7x
PUBALIBANK	22,905	1.6%	3.6x	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%	15.8x	2.5x
ALARABANK	18,282	1.3%	13.5x	1.0x
BEACONPHAR	17,838	1.3%	51.6x	4.5x
PRIMEBANK	16,142	1.1%	4.4x	0.7x
ROBI	14,876	1.1%	21.3x	2.2x
UTTARABANK	13,699	1.0%	8.8x	0.8x
NBL	13,055	0.9%	NM	2.5x
BSRMLTD	12,852	0.9%	5.4x	0.5x

* 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	394.2	+2.3%	196.0	NM	25.7x
BPML	41.5	+9.8%	119.0	NM	0.6x
MIDLANDBNK	21.1	+4.5%	113.2	12.2x	1.5x
PAPERPROC	95.1	+3.6%	99.7	28.5x	1.3x
AGNISYSL	28.0	-1.8%	90.9	18.8x	1.6x
SPCERAMICS	17.7	-2.2%	89.6	NM	0.6x
IFIC	7.6	-1.3%	82.9	6.1x	0.4x
BATBC	334.0	-3.7%	75.7	10.3x	3.1x
KTL	13.5	+1.5%	73.6	NM	0.9x
FUWANGFOOL	17.0	-2.3%	67.5	NM	8.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	107.0	100.0	10.0	566	57.95
RELIANCE1	23.9	21.5	7.0	681	15.12
JAMUNABANK	21.5	21.5	1.0	600	12.90
MERCINS	23.5	23.5	1.0	381	8.94
IFIC	8.3	8.3	1.0	783	6.50
FEDERALINS	18.0	18.0	1.0	308	5.55
LOVELLO	81.0	81.0	1.0	60	4.86
NBL	4.5	4.5	1.0	820	3.69
SEMLLECMF	6.8	6.8	1.0	500	3.40
PRIMELIFE	33.0	33.0	1.0	100	3.32

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BEACHHATCH	107.0	100.0	58.0	566	10
RELIANCE1	23.9	21.5	15.1	681	7
JAMUNABANK	21.5	21.5	12.9	600	1
MERCINS	23.5	23.5	8.9	381	1
IFIC	8.3	8.3	6.5	783	1
FEDERALINS	18.0	18.0	5.5	308	1
LOVELLO	81.0	81.0	4.9	60	1
NBL	4.5	4.5	3.7	820	1
SEMLLECMF	6.8	6.8	3.4	500	1
PRIMELIFE	33.0	33.0	3.3	100	1
KOHINOOR	560.0	560.0	2.8	5	2
ACMEPL	16.0	16.0	2.7	170	1
EIL	51.5	51.5	2.1	40	1
UNITEDINS	37.0	37.0	1.9	50	1
STYLECRAFT	61.8	56.5	1.7	29	2
AIL	83.5	83.5	1.7	20	1
ASIATICLAB	39.5	39.5	1.5	37	1
BPML	40.0	40.0	1.4	36	1
SUNLIFEINS	70.4	70.4	1.4	20	1
AL-HAJTEX	148.6	148.6	1.3	9	1
MONNOCERA	86.2	86.2	0.9	10	1
BEACONPHAR	130.0	130.0	0.8	6	1
Total			147.0		47

Important DSE News

ZAHEENSPIN

(Q2 Un-audited): EPS was Tk. (1.08) for October-December 2024 as against Tk. (0.11) for October-December 2023; EPS was Tk. (1.15) for July-December 2024 as against Tk. (0.20) for July-December 2023. NOCFPS was Tk. (0.00) for July-December 2024 as against Tk. (0.04) for July-December 2023. NAV per share was Tk. 2.78 as on December 31, 2024 and Tk. 3.96 as on June 30, 2024.

FIRSTSBANK

The company has informed that the Board of Directors has accorded post facto approval of the appointment of Mr. Nijam Kazi ACS, Assistant Vice President of the Bank as Company Secretary (Current Charge) with effect from February 25, 2025.

ALARABANK

The company has informed that the Board of Directors has appointed (post facto approval) Mr. Mohammad Moniruzzaman, FCA, Senior Assistant Vice President of the Bank as the new Company Secretary (Acting) with effect from February 20, 2025.

ICB

The company has informed that Mr. Niranjana Chandra Debnath has been appointed as the Managing Director of the company with effect from 20.02.2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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