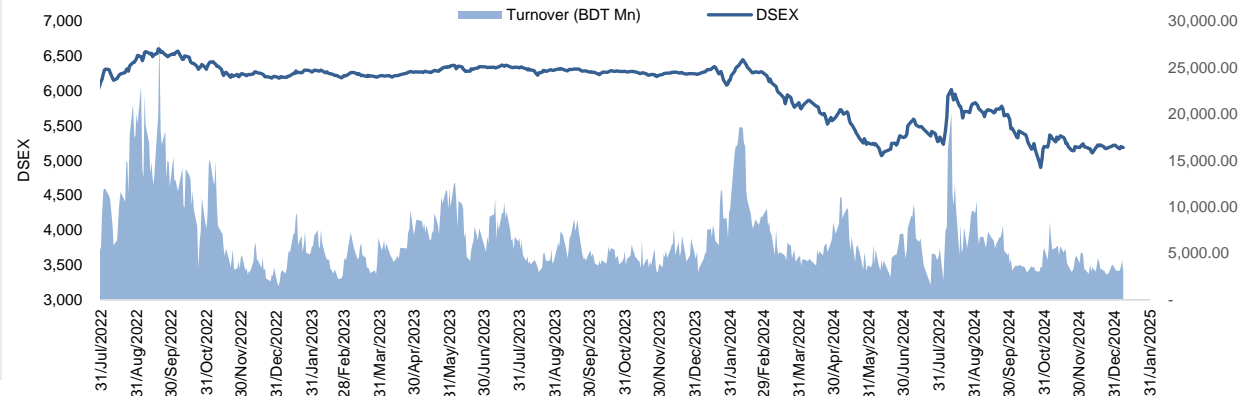


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.11%) lost 5.78 points and closed at 5,185.00. The blue-chip index DS30 (-0.09%), the Shariah-based index DSES (-0.05%), and the large-cap index CDSET (-0.04%) closed at 1,921.00, 1,158.35, and 1,060.79 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.06% followed by Food & Allied (-0.52%), Bank (-0.43%), Fuel & Power (-0.37%), Engineering (-0.21%), Telecommunication (-0.08%), and Pharmaceutical (+0.07%), respectively. Block trades contributed 2.6% of the overall market turnover. Fine Foods Limited (-0.8%) was the most traded share with a turnover of BDT 129 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,185.00	5,190.78	-5.78	-0.11%	-0.6%
DS30	1,921.00	1,922.75	-1.74	-0.09%	-1.0%
DSES	1,158.35	1,158.90	-0.54	-0.05%	-0.9%
CDSET	1,060.79	1,061.25	-0.46	-0.04%	-0.5%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	118	214	64	396
<b>A Category (Equity)</b>	48	137	34	219
<b>B Category (Equity)</b>	25	52	13	90
<b>N Category (Equity)</b>	2	2	0	4
<b>Z Category (Equity)</b>	43	23	17	83
<b>Mutual Funds</b>	5	14	18	37
<b>Corporate Bonds</b>	2	0	0	2
<b>Treasury Bonds</b>	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
<b>Mcap</b>	Mn BDT	6,587,742	6,596,946	-0.1%
	Mn USD	53,998	54,073	
<b>Turnover</b>	Mn BDT	3,070	4,276	-28.2%
	Mn USD	25	35	
<b>Volume</b>	Mn Shares	127	171	-25.7%
<b>No. of Trade</b>		110,925	127,188	-12.8%

\* Average Interbank Exchange Rate is BDT 122.00 as of Jan 08, 2025

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Figure: Sectorial Turnover (BDT Mn)

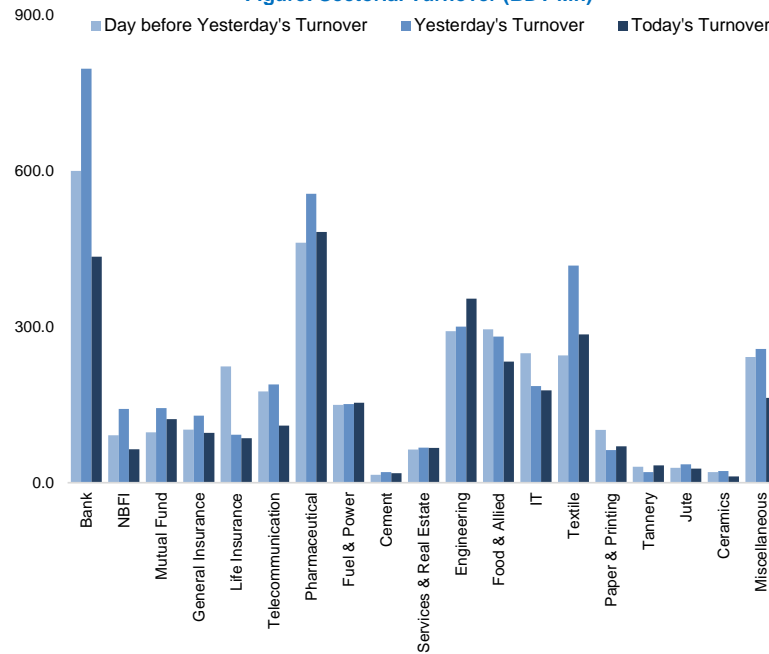
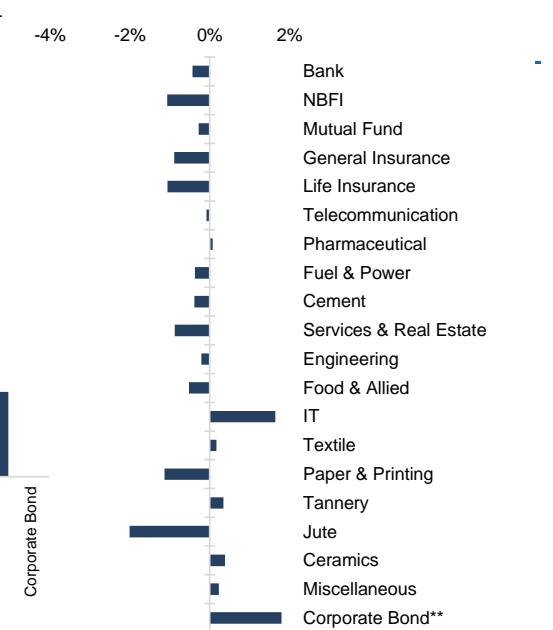


Figure: Sectorial Mcap Change



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	1,460	1,466	-6.36	-0.43%	36	690,786	10.5%	434.6	14.5%	8.9x	0.7x	GP	441,143	12.3%	44.5	12.5x	7.6x
NBFI	1,160	1,172	-12.44	-1.06%	23	110,509	1.7%	64.4	2.2%	NM	NM	SQURPHARMA	192,183	5.3%	63.2	9.1x	1.4x
Mutual Fund	596	598	-1.63	-0.27%	37	27,390	0.4%	122.0	4.1%	NM	0.5x	BATBC	190,998	5.3%	12.3	10.9x	3.1x
General Insurance	2,694	2,718	-24.10	-0.89%	43	76,899	1.2%	95.8	3.2%	13.9x	1.2x	ROBI	152,424	4.2%	60.0	27.7x	2.3x
Life Insurance	1,775	1,793	-18.92	-1.06%	15	47,196	0.7%	85.3	2.9%	NM	NM	WALTONHIL	147,587	4.1%	2.7	11.3x	1.3x
Telecommunication	5,253	5,257	-4.26	-0.08%	3	615,974	9.4%	109.9	3.7%	14.6x	4.4x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,928	2,926	+2.14	+0.07%	34	555,124	8.4%	481.8	16.1%	14.1x	1.5x	BRACBANK	88,132	2.5%	27.0	8.0x	1.2x
Fuel & Power	1,095	1,099	-4.06	-0.37%	23	290,033	4.4%	154.0	5.2%	14.1x	0.6x	BERGERPBL	85,312	2.4%	0.6	25.6x	5.4x
Cement	1,906	1,913	-7.30	-0.38%	7	90,814	1.4%	18.5	0.6%	15.3x	1.9x	ISLAMIBANK	79,051	2.2%	26.8	16.9x	1.1x
Services & Real Estate	988	997	-8.70	-0.87%	9	54,342	0.8%	67.1	2.2%	18.1x	0.4x	MARICO	72,894	2.0%	1.5	13.8x	9.6x
Engineering	2,483	2,488	-5.22	-0.21%	42	280,120	4.3%	354.0	11.8%	12.2x	0.8x	UPGDCL	70,201	2.0%	1.3	6.7x	1.8x
Food & Allied	16,686	16,773	-86.68	-0.52%	21	305,312	4.6%	233.1	7.8%	16.3x	4.3x	LHB	60,391	1.7%	10.7	14.9x	3.0x
IT	2,015	1,982	+32.60	+1.64%	11	26,574	0.4%	177.3	5.9%	19.5x	1.7x	ICB	51,168	1.4%	14.4	26.3x	1.2x
Textile	1,089	1,087	+1.80	+0.17%	58	113,410	1.7%	285.1	9.5%	NM	0.8x	UNILEVERCL	49,074	1.4%	0.0	66.8x	20.9x
Paper & Printing	3,980	4,026	-45.68	-1.13%	6	17,983	0.3%	69.9	2.3%	NM	0.8x	DUTCHBANGL	45,611	1.3%	8.3	7.3x	0.9x
Tannery	2,005	1,998	+6.87	+0.34%	6	22,341	0.3%	33.5	1.1%	68.4x	1.5x	POWERGRID	36,370	1.0%	4.8	NM	0.2x
Jute	13,552	13,830	-277.14	-2.00%	3	2,983	0.0%	27.2	0.9%	NM	NM	BXPHARMA	35,020	1.0%	22.4	5.8x	0.7x
Ceramics	353	352	+1.36	+0.39%	5	15,833	0.2%	12.3	0.4%	NM	1.0x	PUBALIBANK	34,474	1.0%	29.4	3.6x	0.6x
Miscellaneous	4,277	4,267	+9.88	+0.23%	15	232,241	3.5%	163.1	5.5%	42.7x	1.8x	EBL	33,274	0.9%	2.5	5.1x	0.8x
Corporate Bond**	14,998	14,733	+264.94	+1.80%	16	34,101	0.5%	0.1	0.0%	NM	NM	OLYMPIC	30,771	0.9%	2.7	16.7x	2.7x
Treasury Bond**	573	567	+5.61	+0.99%	234	2,977,104	45.2%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
RSRMSTEEL	10.3	+9.6%	1.1	NM	0.2x
OAL	8.1	+9.5%	10.5	NM	0.8x
PENINSULA	11.9	+9.2%	5.3	NM	0.4x
PDL	7.3	+9.0%	7.6	NM	0.5x
AOL	18.5	+8.2%	55.3	35.6x	1.0x
ZAHEENSPIN	6.6	+6.45%	3.0	NM	1.7x
LEGACYFOOT	63.3	+5.9%	25.8	NM	6x
DOMINAGE	12.8	+5.8%	30.8	NM	0.7x
ADNTEL	93.1	+5.3%	30.1	17.2x	2.9x
AGNISYSL	26.0	+4.8%	84.0	21.8x	1.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DULAMIACOT	73.1	-7.1%	1.3	NM	NM
STANCERAM	64.0	-4.5%	0.3	NM	NM
ICICL	20.3	-4.2%	2.4	18.3x	1.2x
GEMINISEA	158.3	-4.1%	10.1	90.6x	9.1x
ICBAGRANI1	7.1	-4.1%	0.1	NM	0.9x
ISNLTD	41.0	-4.0%	8.1	NM	14.0x
PRIMEINSUR	34.7	-3.6%	0.1	15.5x	1.6x
SINGERBD	109.7	-3.3%	2.5	NM	3.5x
POPULAR1MF	3.0	-3.2%	1.1	NM	0.3x
TUNGHAI	3.0	-3.2%	0.1	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.1x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.9x	3.1x
RENATA	35,002	2.6%	22.6x	2.1x
ISLAMIBANK	33,649	2.5%	16.9x	1.1x
BXPHARMA	32,479	2.4%	5.8x	0.7x
BRACBANK	32,157	2.4%	8.0x	1.2x
GP	30,004	2.2%	12.5x	7.6x
LHB	24,690	1.8%	14.9x	3.0x
EBL	24,199	1.8%	5.1x	0.8x
PUBALIBANK	20,448	1.5%	3.6x	0.6x
NBL	16,930	1.2%	NM	2.7x
CITYBANK	16,830	1.2%	4.3x	0.8x
BSRMLTD	14,210	1.0%	4.6x	0.5x
ALARABANK	13,534	1.0%	12.4x	0.9x
PRIMEBANK	12,985	1.0%	4.3x	0.7x
OLYMPIC	12,616	0.9%	16.7x	2.7x
UTTARABANK	11,350	0.8%	9.0x	0.8x
ORIONPHARM	11,317	0.8%	43.1x	0.4x
ROBI	10,738	0.8%	27.7x	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
FINEFOODS	249.8	-0.8%	129.4	NM	20.9x
ASIATICLAB	37.3	+3.3%	100.6	15.8x	0.7x
AGNISYSL	26.0	+4.8%	84.0	21.8x	1.5x
MIDLANDBNK	33.0	-1.5%	82.3	19.1x	2.3x
OIMEX	28.5	-	80.0	28.7x	8.3x
AFTABAUTO	37.4	+4.2%	75.4	NM	0.8x
ORIONINFU	370.1	-2.4%	69.4	NM	23.1x
KBPPWBIL	146.7	-1.6%	65.9	NM	12.3x
SQURPHARMA	216.8	-0.1%	63.2	9.1x	1.4x
ROBI	29.1	-0.7%	60.0	27.7x	2.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RELIANCE1	24.4	21.0	25.0	1,318	28.34
FINEFOODS	245.0	236.0	5.0	73	17.63
LOVELLO	91.0	82.0	2.0	66	5.47
EIL	59.0	54.0	3.0	93	5.17
BDTHAI	12.1	12.1	1.0	300	3.63
DUTCHBANGL	57.9	57.9	1.0	60	3.47
IDLC	32.2	32.2	1.0	80	2.58
DSSL	11.8	11.8	1.0	175	2.07
SHAHJABANK	20.0	20.0	1.0	100	2.00
ICBSONALI1	7.3	7.3	1.0	234	1.71

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RELIANCE1	24.4	21.0	28.3	1,318	25
FINEFOODS	245.0	236.0	17.6	73	5
LOVELLO	91.0	82.0	5.5	66	2
EIL	59.0	54.0	5.2	93	3
BDTHAI	12.1	12.1	3.6	300	1
DUTCHBANGL	57.9	57.9	3.5	60	1
IDLC	32.2	32.2	2.6	80	1
DSSL	11.8	11.8	2.1	175	1
SHAHJABANK	20.0	20.0	2.0	100	1
ICBSONALI1	7.3	7.3	1.7	234	1
PREMIERCEM	48.0	48.0	1.6	33	1
AIL	98.3	98.3	1.4	14	1
ORIONINFU	406.0	406.0	0.8	2	1
CITYGENINS	46.9	46.9	0.8	16	1
GP	328.0	328.0	0.6	2	1
BPML	31.6	31.6	0.6	19	1
POWERGRID	44.4	44.4	0.6	14	1
SIMTEX	19.7	19.7	0.6	29	1
LINDEBD	1,030.0	1,030.0	0.5	1	1
NAVANAPHAR	47.5	47.5	0.5	11	1
EGEN	25.1	25.1	0.5	20	1
BATBC	324.5	324.5	0.5	2	1
<b>Total</b>			<b>81.1</b>		<b>53</b>

**Important DSE News**

**KEYACOSMET**

In response to a DSE query dated January 05, 2025 based on a recent news published in a newspaper regarding permanent closure of Kea Group's four factories in Gazipur, the company has informed DSE, among others, the following: ".....On December 26, 2024, workers at our factory staged a protest due to unpaid wages, escalating into a road blockade on the highway. Without reinstatement of banking facilities, it is impossible for us to sustain operations. Consequently, we have been forced to close the following units: Keya Spinning Division, Cotton Division, Garments and Knitting Division and Keya Yarn Mills Ltd. However, our main company-Keya Cosmetics Ltd. and the Dyeing Section remain operational.....". To view the details, please visit the following link: [https://www.dsebd.org/Annexure/2024/KEYACOSMET\\_2025.pdf](https://www.dsebd.org/Annexure/2024/KEYACOSMET_2025.pdf)

**TOSRIFA**

Mr. Naim Hassan, a Sponsor Director of the company, has expressed his intention to sell 1,616,591 shares out of his total holding of 8,156,581 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
NBL		0.0%	0%	Record Date	16-Jan-25
HRTEX		0.0%	0%	Record Date	22-Jan-25

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