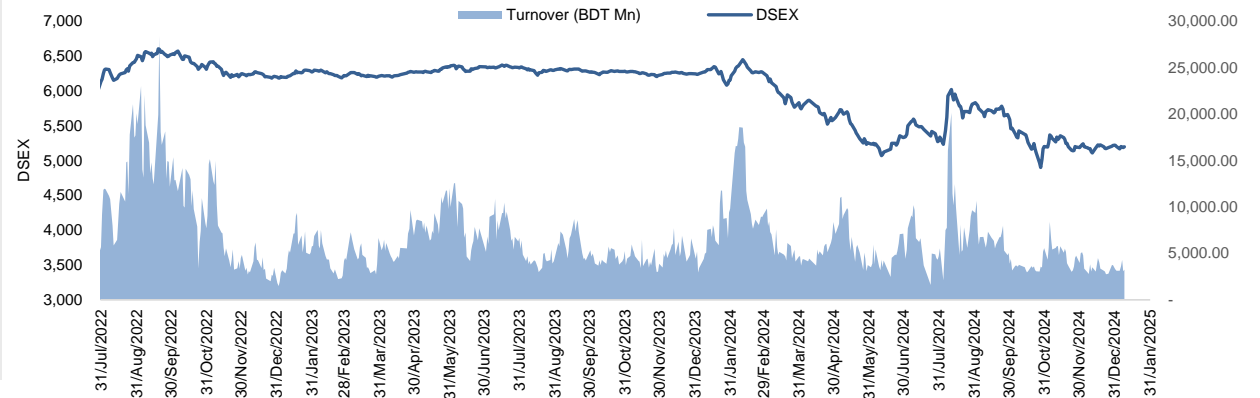


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.18%) gained 9.43 points and closed at 5,194.43. The blue-chip index DS30 (+0.17%), the Shariah-based index DSES (+0.31%), and the large-cap index CDSET (+0.04%) closed at 1,924.27, 1,161.94, and 1,061.21 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 1.64%, followed by Food & Allied (+0.60%), Fuel & Power (+0.14%), Engineering (-0.07%), Bank (-0.08%), NBF1 (-0.23%), and Pharmaceutical (-0.30%), respectively. Block trades contributed 3.0% of the overall market turnover. Grameenphone Ltd. (+1.7%) was the most traded share with a turnover of BDT 133 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,194.43	5,185.00	+9.43	+0.18%	-0.4%
DS30	1,924.27	1,921.00	+3.27	+0.17%	-0.8%
DSES	1,161.94	1,158.35	+3.59	+0.31%	-0.6%
CDSET	1,061.21	1,060.79	+0.42	+0.04%	-0.5%

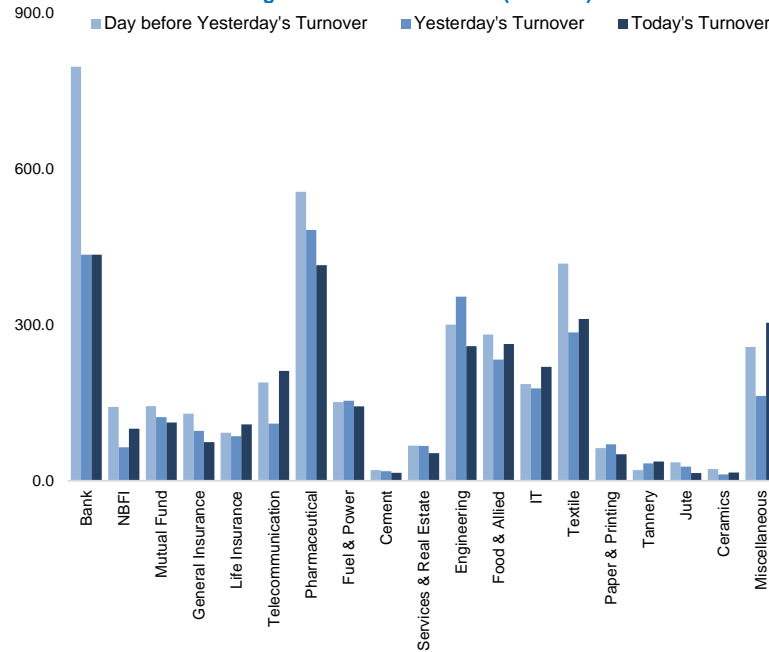
	Advanced	Declined	Unchanged	Total
<b>All Category</b>	157	156	87	400
<b>A Category (Equity)</b>	93	81	49	223
<b>B Category (Equity)</b>	33	34	23	90
<b>N Category (Equity)</b>	2	1	1	4
<b>Z Category (Equity)</b>	29	40	14	83
<b>Mutual Funds</b>	14	3	20	37
<b>Corporate Bonds</b>	0	3	0	3
<b>Treasury Bonds</b>	1	2	0	3

	Today	Last Day	Daily %Δ	
<b>Mcap</b>	Mn BDT	6,602,932	6,587,742	+0.2%
	Mn USD	54,122	53,998	
<b>Turnover</b>	Mn BDT	3,240	3,070	+5.5%
	Mn USD	27	25	
<b>Volume</b>	Mn Shares	117	127	-8.4%
<b>No. of Trade</b>		111,027	110,925	+0.1%

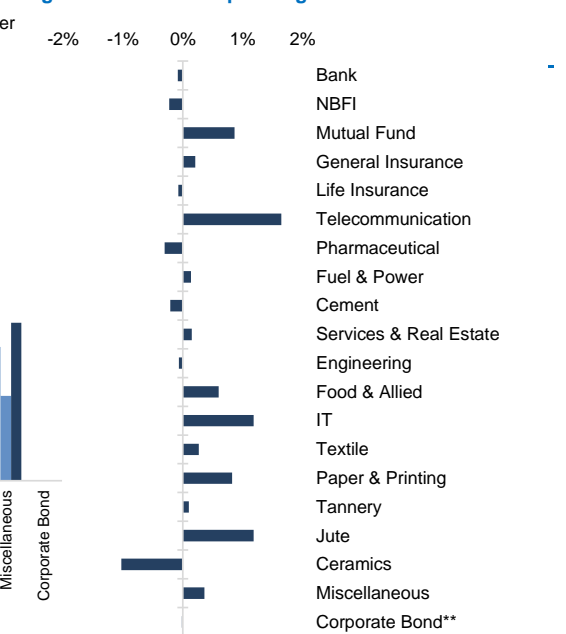
\* Average Interbank Exchange Rate is BDT 122.00 as of Jan 09, 2025

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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	1,459	1,460	-1.20	-0.08%	36	690,217	10.5%	434.4	13.8%	8.9x	0.7x	GP	448,840	12.4%	132.9	12.7x	7.8x
NBFI	1,157	1,160	-2.64	-0.23%	23	110,258	1.7%	100.2	3.2%	NM	NM	BATBC	192,294	5.3%	20.8	11.0x	3.1x
Mutual Fund	601	596	+5.15	+0.86%	37	27,627	0.4%	111.7	3.6%	NM	0.5x	SQURPHARMA	192,005	5.3%	42.4	9.1x	1.4x
General Insurance	2,699	2,694	+5.58	+0.21%	43	77,058	1.2%	73.9	2.4%	13.9x	1.2x	ROBI	154,519	4.3%	75.1	28.1x	2.4x
Life Insurance	1,773	1,775	-1.30	-0.07%	15	47,161	0.7%	108.5	3.4%	NM	NM	WALTONHIL	147,284	4.1%	3.6	11.3x	1.3x
Telecommunication	5,340	5,253	+86.38	+1.64%	3	626,103	9.5%	211.1	6.7%	14.8x	4.4x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,919	2,928	-8.92	-0.30%	34	553,434	8.4%	414.1	13.2%	14.1x	1.5x	BRACBANK	88,486	2.5%	20.0	8.0x	1.2x
Fuel & Power	1,096	1,095	+1.48	+0.14%	23	290,424	4.4%	143.1	4.5%	14.2x	0.6x	BERGERPBL	84,320	2.3%	0.2	25.3x	5.3x
Cement	1,902	1,906	-3.94	-0.21%	7	90,626	1.4%	15.0	0.5%	15.2x	1.9x	ISLAMIBANK	79,051	2.2%	15.2	16.9x	1.1x
Services & Real Estate	990	988	+1.48	+0.15%	9	54,423	0.8%	52.8	1.7%	18.1x	0.4x	MARICO	72,463	2.0%	1.5	13.7x	9.5x
Engineering	2,481	2,483	-1.66	-0.07%	42	279,933	4.2%	258.6	8.2%	12.2x	0.8x	UPGDCL	70,723	2.0%	0.3	6.8x	1.8x
Food & Allied	16,786	16,686	+99.91	+0.60%	21	307,140	4.7%	262.7	8.4%	16.4x	4.3x	LHB	60,159	1.7%	6.6	14.9x	3.0x
IT	2,039	2,015	+23.84	+1.18%	11	26,889	0.4%	218.8	7.0%	19.8x	1.7x	ICB	51,168	1.4%	12.6	26.3x	1.2x
Textile	1,092	1,089	+2.92	+0.27%	58	113,714	1.7%	310.8	9.9%	NM	0.8x	UNILEVERCL	49,238	1.4%	0.3	67.0x	21.0x
Paper & Printing	4,013	3,980	+32.83	+0.82%	6	18,131	0.3%	50.8	1.6%	NM	0.8x	DUTCHBANGL	45,786	1.3%	6.6	7.3x	0.9x
Tannery	2,007	2,005	+2.03	+0.10%	6	22,363	0.3%	37.1	1.2%	68.4x	1.5x	POWERGRID	36,004	1.0%	7.0	NM	0.2x
Jute	13,713	13,552	+160.59	+1.18%	3	3,019	0.0%	14.9	0.5%	NM	NM	BXPHARMA	34,886	1.0%	44.3	5.8x	0.7x
Ceramics	349	353	-3.63	-1.03%	5	15,670	0.2%	15.6	0.5%	NM	1.0x	PUBALIBANK	34,358	1.0%	35.1	3.6x	0.6x
Miscellaneous	4,292	4,277	+15.50	+0.36%	15	233,083	3.5%	303.6	9.7%	42.8x	1.8x	EBL	33,139	0.9%	2.3	5.1x	0.8x
Corporate Bond**	14,996	14,998	-2.11	-0.01%	16	33,780	0.5%	0.0	0.0%	NM	NM	OLYMPIC	30,931	0.9%	4.0	16.8x	2.8x
Treasury Bond**	579	573	+6.67	+1.16%	234	2,981,219	45.2%	7.0	0.2%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	161.1	+9.8%	123.8	NM	13.5x
HRTEX	30.3	+9.4%	10.7	NM	1.6x
DAFODILCOM	63.6	+8.7%	6.7	NM	4.7x
GQBALLPEN	138.3	+7.6%	62.6	NM	1.2x
FIRSTFIN	3.3	+6.5%	0.5	NM	NM
MIRACLEIND	30.0	+6.38%	15.0	NM	2.3x
ANLIMAYARN	22.7	+5.6%	0.4	NM	3x
AMANFEED	28.9	+5.5%	39.0	NM	1.0x
ESQUIRENIT	20.0	+5.3%	4.2	24.1x	0.3x
UNITEDINS	40.5	+4.9%	4.3	17.9x	1.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
RSRMSTEEL	9.8	-4.9%	0.8	NM	0.2x
SBACBANK	8.8	-4.3%	34.1	4.8x	1x
ORIONINFU	355.1	-4.1%	86.3	NM	22.2x
OAL	7.8	-3.7%	6.8	NM	0.8x
NFML	8.0	-3.6%	1.2	NM	0.7x
TUNGHAI	2.9	-3.3%	0.2	NM	NM
ICBIBANK	3.0	-3.2%	0.1	NM	NM
HFL	9.1	-3.2%	0.3	NM	0.3x
FAREASTLIF	30.7	-3.2%	1.2	NM	NM
PHOENIXFIN	3.3	-2.9%	2.7	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%	11.0x	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%	12.7x	7.8x
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%	12.3x	0.9x
PRIMEBANK	12,985	1.0%	4.3x	0.7x
OLYMPIC	12,616	0.9%	16.8x	2.8x
UTTARABANK	11,350	0.8%	8.6x	0.8x
ORIONPHARM	11,317	0.8%	42.9x	0.4x
ROBI	10,738	0.8%	28.1x	2.4x

\* 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
GP	332.4	+1.7%	132.9	12.7x	7.8x
KBPPWBIL	161.1	+9.8%	123.8	NM	13.5x
FINEFOODS	254.5	+1.9%	121.6	NM	21.3x
AGNISYSL	25.6	-1.5%	88.5	21.5x	1.5x
ORIONINFU	355.1	-4.1%	86.3	NM	22.2x
MIDLANDBNK	33.8	+2.4%	78.3	19.5x	2.3x
ROBI	29.5	+1.4%	75.1	28.1x	2.4x
JAMUNABANK	19.5	-	73.7	5.2x	0.7x
AFTABAUTO	37.2	-0.5%	69.0	NM	0.8x
FEKDIL	18.5	-	65.0	8.4x	0.9x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RELIANCE1	25.1	21.8	21.0	1,429	31.81
LOVELLO	85.0	81.0	3.0	110	8.95
TOSRIFA	21.0	21.0	1.0	357	7.50
FINEFOODS	250.0	242.0	2.0	27	6.75
MIDLANDBNK	32.6	32.5	3.0	200	6.51
EIL	52.0	52.0	1.0	100	5.20
BEACHHATCH	90.0	90.0	1.0	50	4.50
KBPPWBIL	140.0	140.0	1.0	25	3.50
FEKDIL	19.6	18.3	3.0	170	3.17
BNICL	41.1	41.1	1.0	65	2.68

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RELIANCE1	25.1	21.8	31.8	1,429	21
LOVELLO	85.0	81.0	9.0	110	3
TOSRIFA	21.0	21.0	7.5	357	1
FINEFOODS	250.0	242.0	6.8	27	2
MIDLANDBNK	32.6	32.5	6.5	200	3
EIL	52.0	52.0	5.2	100	1
BEACHHATCH	90.0	90.0	4.5	50	1
KBPPWBIL	140.0	140.0	3.5	25	1
FEKDIL	19.6	18.3	3.2	170	3
BNICL	41.1	41.1	2.7	65	1
OIMEX	28.7	28.7	2.4	83	1
KARNAPHULI	31.6	31.6	1.9	59	1
AGNISYSL	28.6	28.6	1.7	60	1
UNIQUEHRL	46.9	46.9	1.2	25	1
SQUARETEXT	52.0	52.0	1.0	20	1
EASTLAND	20.5	20.5	1.0	50	1
BESTHLDNG	19.5	19.5	1.0	50	1
ADNTEL	93.1	93.1	0.9	10	1
SBACBANK	9.6	9.6	0.7	75	1
BXPHARMA	86.3	86.3	0.6	7	1
HRTEX	29.6	29.6	0.6	20	1
RUPALILIFE	107.0	107.0	0.6	5	1
<b>Total</b>			<b>95.7</b>		<b>52</b>

**Important DSE News**

**ACI**

Dr. Arif Dowla, Managing Director of the Company, has expressed his intention to buy 6,00,000 shares of the Company at prevailing market price (in the Block Market) through Dhaka Stock Exchange PLC. within next within next 30 working days.

**IBNSINA**

A. K. M. Sadrul Islam, Nominated Director of the Company, has expressed his intention to buy 515 shares of the Company at prevailing market price (in the Public 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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