

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.75%) lost 53.09 points and closed at 6,996.06. The blue-chip index DS30 (-0.76%), the Shariah-based index DSES (-0.07%), and the large-cap index CDSET (-0.78%) closed at 2,606.79, 1,494.78, and 1,402.56 points, respectively. Most of the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 2.42% followed by NBF1 (-1.88%), Engineering (-1.05%), Pharmaceutical (-0.47%), Bank (-0.25%), Food & Allied (-0.03%), and Telecommunication (+2.56%), respectively. Block trades contributed 0.5% of the overall market turnover. Fortune Shoes Limited (+5.6%) was the most traded share with a turnover of BDT 1,019 million.

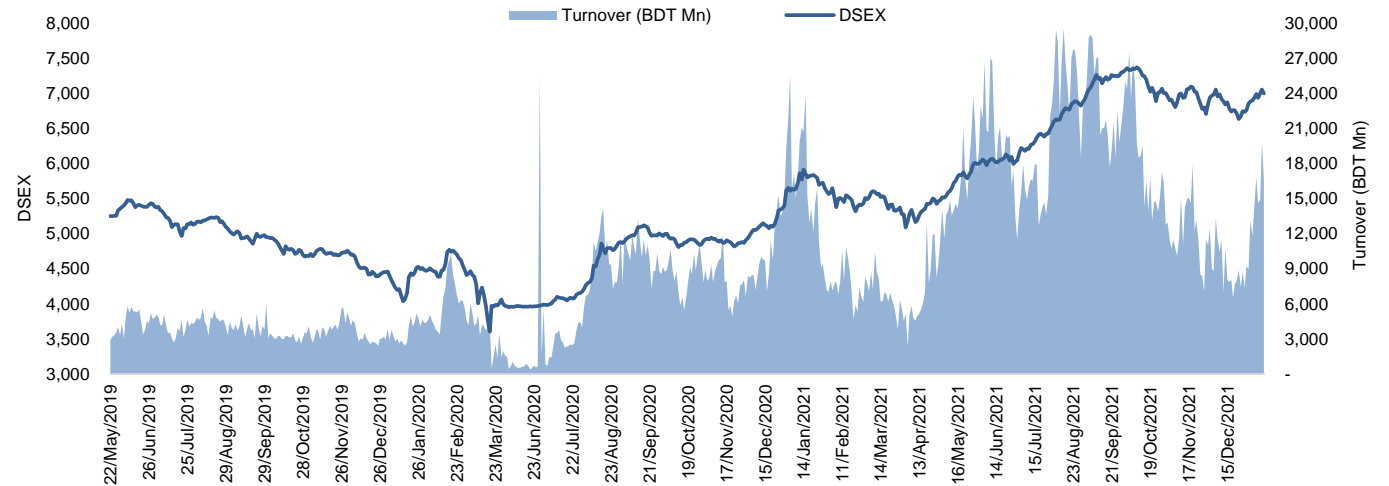


Figure: Sectorial Turnover (BDT)

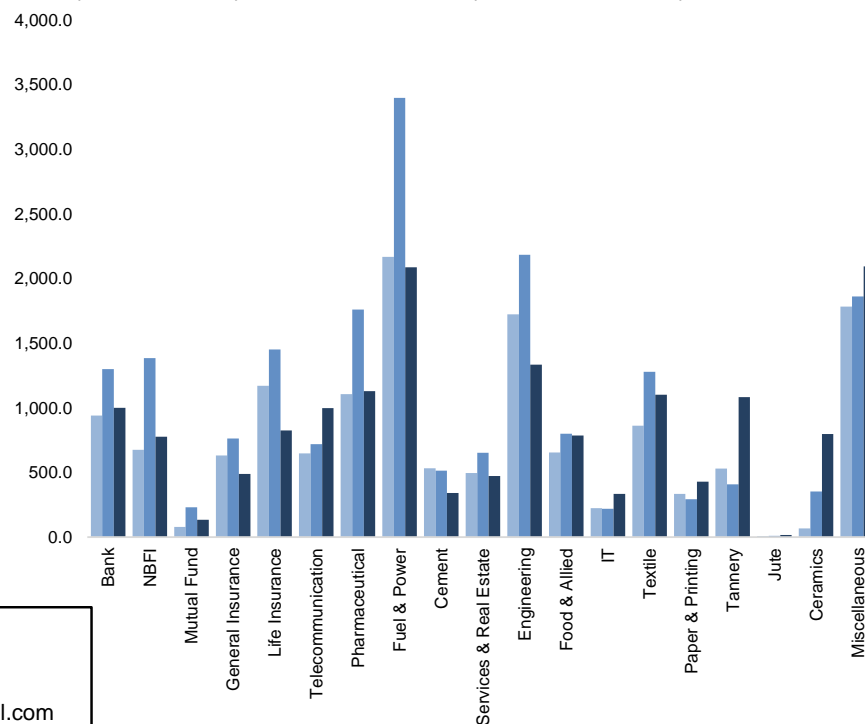
Figure: Sectorial Mcap Change

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,996.06	7,049.15	-53.09	-0.75%	+3.5%
DS30	2,606.79	2,626.66	-19.88	-0.76%	+2.9%
DSES	1,494.78	1,495.87	-1.09	-0.07%	+4.4%
CDSET	1,402.56	1,413.60	-11.04	-0.78%	+3.2%

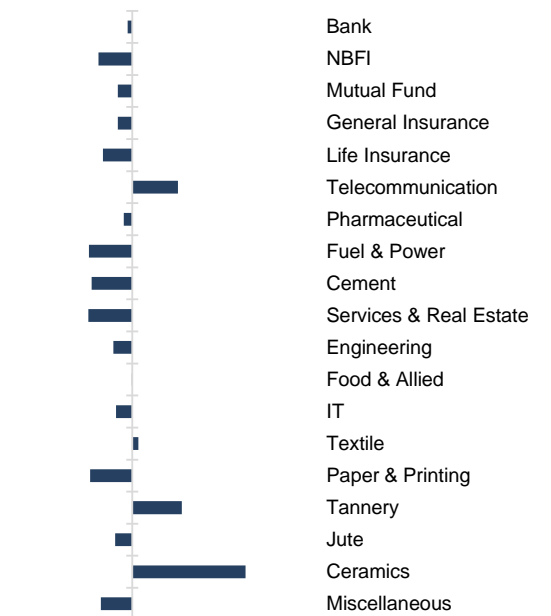
	Advanced	Declined	Unchanged	Total
All Category	88	243	47	378
A Category (Equity)	54	166	34	254
B Category (Equity)	24	52	7	83
N Category (Equity)	3	8	0	11
Z Category (Equity)	7	17	6	30
Mutual Funds	6	17	13	36
Corporate Bonds	1	2	0	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,604,979	5,624,831	-0.4%
	Mn USD	65,326	65,557	
Turnover	Mn BDT	16,642	19,769	-15.8%
	Mn USD	194	230	
Volume	Mn Shares	347	433	-19.9%
No. of Trade		252,406	290,694	-13.2%

Day before Yesterday's Turnover, Yesterday's Turnover, Today's Turnover



Sectorial Mcap Change



Market PE 17.5x
Market PB 2.0x

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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	1,623	1,627	-4.08	-0.25%	32	740,368	14.8%	1,000.2	6.2%	8.2x	0.9x	GP	482,192	9.6%	64.7	13.3x	11.6x
NBFI	2,415	2,462	-46.36	-1.88%	23	236,496	4.7%	775.4	4.8%	22.5x	4.3x	BATBC	350,514	7.0%	121.1	25.5x	8.7x
Mutual Fund	920	928	-7.54	-0.81%	37	42,197	0.8%	134.6	0.8%	NM	0.8x	WALTONHIL	344,732	6.9%	12.0	22.7x	3.7x
General Insurance	4,458	4,495	-36.25	-0.81%	39	129,480	2.6%	488.1	3.0%	20.3x	2.2x	ROBI	215,803	4.3%	533.2	94.0x	3.3x
Life Insurance	2,774	2,820	-46.00	-1.63%	13	79,990	1.6%	825.8	5.1%	NM	NM	SQURPHARMA	195,994	3.9%	59.2	11.5x	2.0x
Telecommunication	6,197	6,042	+154.76	+2.56%	3	734,818	14.7%	997.5	6.1%	18.0x	6.3x	UPGDCL	149,909	3.0%	9.9	13.8x	4.2x
Pharmaceutical	3,930	3,949	-18.56	-0.47%	32	727,989	14.5%	1,129.2	7.0%	19.2x	2.7x	RENATA	140,058	2.8%	8.0	26.9x	5.2x
Fuel & Power	1,963	2,011	-48.65	-2.42%	23	514,233	10.3%	2,087.6	12.9%	12.7x	1.3x	BEXIMCO	130,309	2.6%	982.0	12.9x	1.8x
Cement	2,768	2,833	-64.21	-2.27%	7	138,571	2.8%	342.3	2.1%	19.3x	2.9x	ICB	105,159	2.1%	33.4	74.5x	2.3x
Services & Real Estate	1,379	1,414	-34.57	-2.45%	8	54,058	1.1%	472.6	2.9%	NM	1.1x	LHBL	92,561	1.8%	307.5	23.4x	4.8x
Engineering	4,805	4,856	-50.99	-1.05%	42	575,814	11.5%	1,334.2	8.2%	19.2x	2.1x	BXPHERMA	87,929	1.8%	98.4	15.9x	2.3x
Food & Allied	25,779	25,787	-7.68	-0.03%	20	455,407	9.1%	785.3	4.8%	31.1x	9.2x	BERGERPBL	82,914	1.7%	1.1	26.6x	6.9x
IT	3,311	3,342	-30.25	-0.91%	11	42,625	0.9%	333.6	2.1%	36.5x	3.0x	BRACBANK	78,240	1.6%	63.3	13.6x	1.6x
Textile	1,531	1,526	+5.20	+0.34%	58	167,798	3.4%	1,101.3	6.8%	36.2x	1.0x	MARICO	72,648	1.5%	2.7	22.0x	30.9x
Paper & Printing	9,438	9,666	-228.18	-2.36%	6	33,520	0.7%	427.9	2.6%	NM	2.4x	BEACONPHAR	55,532	1.1%	160.1	48.0x	9.7x
Tannery	3,638	3,540	+98.22	+2.77%	6	39,310	0.8%	1,083.4	6.7%	NM	3.9x	ISLAMIBANK	51,681	1.0%	6.3	9.6x	0.8x
Jute	8,412	8,492	-80.53	-0.95%	3	1,974	0.0%	17.3	0.1%	NM	19.9x	POWERGRID	50,319	1.0%	778.7	15.2x	0.6x
Ceramics	804	756	+47.88	+6.34%	5	36,422	0.7%	797.4	4.9%	37.3x	2.3x	DUTCHBANGL	49,778	1.0%	24.1	8.5x	1.4x
Miscellaneous	4,781	4,866	-85.21	-1.75%	14	255,796	5.1%	2,094.5	12.9%	17.0x	2.3x	TITASGAS	47,285	0.9%	564.6	13.7x	0.7x
												SUMITPOWER	42,608	0.9%	41.5	8.0x	1.1x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LOVELLO	49.7	+10.0%	289.2	31.7x	3.8x
TALLUSPIN	12.2	+9.9%	13.5	NM	1.1x
RAKCERAMIC	55.9	+9.8%	682.7	27.8x	3.3x
RANFOUNDRY	188.3	+9.5%	48.7	51.0x	6.2x
AMCL(PRAN)	336.3	+8.7%	102.0	60.3x	3.9x
ROBI	41.2	+7.9%	533.2	94.0x	3.3x
AIL	50.2	+7.7%	39.4	33.7x	2.3x
MITHUNKNIT	14.1	+7.6%	4.8	NM	0.8x
MONNOAGML	592.7	+7.5%	18.8	NM	42.4x
SIBL	18.0	+6.5%	167.1	10.7x	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BSC	114.5	-10.0%	964.5	13.5x	1.8x
DULAMIACOT	46.5	-7.7%	0.3	NM	NM
DESCO	43.2	-7.7%	54.2	24.9x	0.7x
NLTUBES	93.8	-6.6%	45.5	NM	0.6x
POWERGRID	70.6	-6.4%	778.7	15.2x	0.6x
BSCCL	223.3	-6.0%	399.7	17.5x	4.0x
NHFIL	56.6	-6.0%	152.0	20.7x	3.1x
WMSHIPYARD	13.2	-5.7%	61.4	NM	0.6x
ATLASBANG	114.9	-5.2%	1.4	NM	0.9x
PENINSULA	37.3	-5.1%	175.3	82.9x	1.2x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	128,239	6.8%	11.5x	2.0x
BATBC	92,711	4.9%	25.5x	8.7x
BEXIMCO	90,499	4.8%	12.9x	1.8x
RENATA	68,376	3.6%	26.9x	5.2x
BXPHERMA	61,392	3.3%	15.9x	2.3x
GP	48,219	2.6%	13.3x	11.6x
BRACBANK	42,062	2.2%	13.6x	1.6x
BEACONPHAR	38,871	2.1%	48.0x	9.7x
LHBL	32,693	1.7%	23.4x	4.8x
EBL	25,707	1.4%	6.8x	1.2x
ISLAMIBANK	25,159	1.3%	9.6x	0.8x
ROBI	21,472	1.1%	94.0x	3.3x
OLYMPIC	19,721	1.0%	17.3x	3.4x
CITYBANK	19,698	1.0%	6.5x	0.9x
PUBALIBANK	19,514	1.0%	5.3x	0.7x
IFIC	19,009	1.0%	14.5x	1.0x
BSRMLTD	18,504	1.0%	6.1x	1.0x
ALARABANK	16,714	0.9%	10.4x	1.2x
NBL	16,665	0.9%	6.6x	0.4x
SUMITPOWER	15,676	0.8%	8.0x	1.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FORTUNE	123.3	+5.6%	1,018.6	52.9x	8.3x
BEXIMCO	148.7	-1.9%	982.0	12.9x	1.8x
BSC	114.5	-10.0%	964.5	13.5x	1.8x
POWERGRID	70.6	-6.4%	778.7	15.2x	0.6x
RAKCERAMIC	55.9	+9.8%	682.7	27.8x	3.3x
TITASGAS	47.8	-3.6%	564.6	13.7x	0.7x
ROBI	41.2	+7.9%	533.2	94.0x	3.3x
FAREASTLIF	89.4	-1.5%	414.2	NM	NM
BSCCL	223.3	-6.0%	399.7	17.5x	4.0x
BPML	64.7	-4.9%	316.3	26.3x	1.4x

Block Trade	Maximum Price (BDT)	Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FORTUNE	120.0	107.0	8.0	761	89.29
PENINSULA	41.2	39.0	8.0	2,160	87.44
FAREASTLIF	97.0	92.5	2.0	486	45.00
BSRMLTD	116.5	116.5	1.0	280	32.62
ANWARGALV	400.0	386.9	3.0	64	25.35
BNICL	130.0	130.0	1.0	138	17.94
GENEXIL	161.9	158.3	4.0	87	13.97
PTL	99.0	95.0	8.0	143	13.85
CVOPRL	222.6	218.1	3.0	35	7.67
BSCCL	246.0	232.0	3.0	32	7.56

*NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
FORTUNE	120.0	107.0	89.3	761	8
PENINSULA	41.2	39.0	87.4	2,160	8
FAREASTLIF	97.0	92.5	45.0	486	2
BSRMLTD	116.5	116.5	32.6	280	1
ANWARGALV	400.0	386.9	25.3	64	3
BNICL	130.0	130.0	17.9	138	1
GENEXIL	161.9	158.3	14.0	87	4
PTL	99.0	95.0	13.8	143	8
CVOPRL	222.6	218.1	7.7	35	3
BSCCL	246.0	232.0	7.6	32	3
MONNOCERA	106.3	106.3	7.4	70	1
NAHEEACP	50.0	47.0	6.1	123	2
POWERGRID	75.0	74.0	4.8	65	3
LOVELLO	49.6	44.5	4.7	101	3
BEXIMCO	165.0	139.0	3.8	25	2
KARNAPHULI	37.0	37.0	3.7	100	1
RDFOOD	55.0	55.0	3.7	67	2
BSC	128.0	114.5	3.5	30	2
NRBCBANK	28.9	28.9	3.5	122	1
AL-HAJTEX	81.0	78.0	3.4	43	3
NHFIL	61.0	61.0	3.1	50	1
BXPHARMA	210.0	210.0	2.8	13	2
Total			413.3		88

Important DSE News
BBSCABLES

Bangladesh Building Systems Ltd., one of the Corporate Directors of the Company, has expressed its intention to sell 11,00,000 shares out of its total holding of 2,84,04,500 shares of the Company at prevailing market price (in the Block Market) through Chittagong Stock Exchange within next 30 working days.

SONALIPAPR

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the Entity Rating of the Company as "A2" along with a stable outlook based on audited financial statements up to June 30, 2021; bank liability (October 30, 2021) and other relevant quantitative and qualitative information up to the date of rating declaration.

TALLUSPIN

As per Regulation 19(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on January 19, 2022 at 3:30 PM, 4:30 PM and 5:30 PM respectively to consider, among others, audited financial statements of the Company for the year ended on June 30, 2019, 2020 and 2021.

SSSTEEL

As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on January 17, 2022 at 6:30 PM to consider, among others, un-audited financial statements of the Company for the First Quarter (Q1) period ended on September 30, 2021.

MHSML

As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on January 18, 2022 at 3:30 PM to consider, among others, un-audited financial statements of the Company for the Second Quarter (Q2) period ended on December 31, 2021.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Bangladesh Shipping Corporation	-	0.0%	12.0%	Record Date	16-Jan-22
Eastern Lubricants	-	20.0%	140.0%	Record Date	18-Jan-22
NLI First Mutual Fund	-	0.0%	0.0%	Record Date	06-Feb-22
Meghna Petroleum Limited	-	0.0%	150.0%	Record Date	25-Jan-22
Jamuna Oil Company Limited	-	0.0%	120.0%	Record Date	23-Jan-22
The Dacca Dyeing & Manufacturing Co.Ltd.	-	0.0%	2.0%	Record Date	03-Feb-22

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