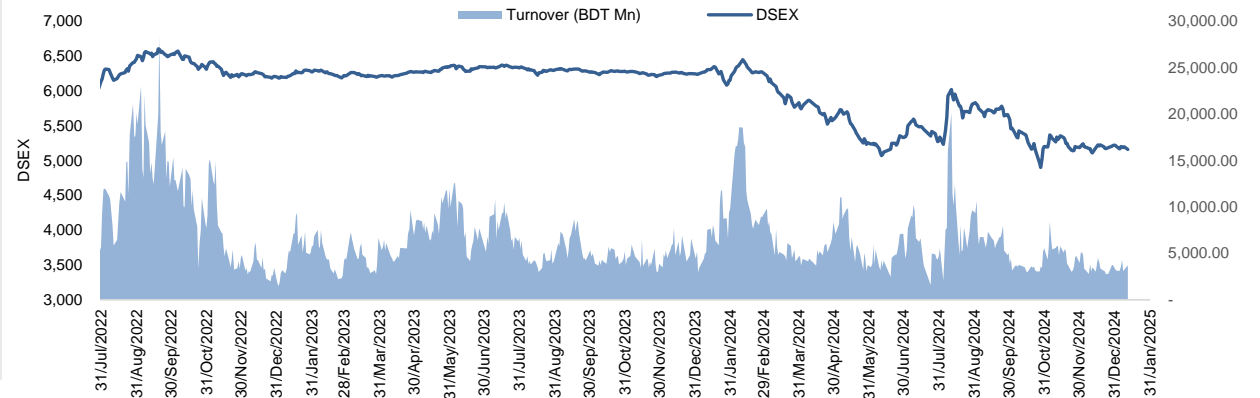


**Daily Market Update**

The market closed in red today. The benchmark index DSEX (-0.74%) lost 38.2 points and closed at 5,156.23. The blue-chip index DS30 (-0.90%), the Shariah-based index DSES (-0.38%), and the large-cap index CDSET (-0.72%) closed at 1,907.04, 1,157.55, and 1,053.58 points, respectively. Most of the large-cap sectors posted negative performance today. Bank experienced the highest loss of 1.53% followed by NBF1 (-0.99%), Food & Allied (-0.68%), Fuel & Power (-0.63%), Pharmaceutical (-0.44%), Engineering (-0.26%), and Telecommunication (+0.36%), respectively. Block trades contributed 6.0% of the overall market turnover. Fine Foods Limited (-8.7%) was the most traded share with a turnover of BDT 194 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,156.23	5,194.43	-38.20	-0.74%	-1.2%
DS30	1,907.04	1,924.27	-17.23	-0.90%	-1.7%
DSES	1,157.55	1,161.94	-4.39	-0.38%	-1.0%
CDSET	1,053.58	1,061.21	-7.63	-0.72%	-1.2%

Figure: Sectorial Turnover (BDT Mn)

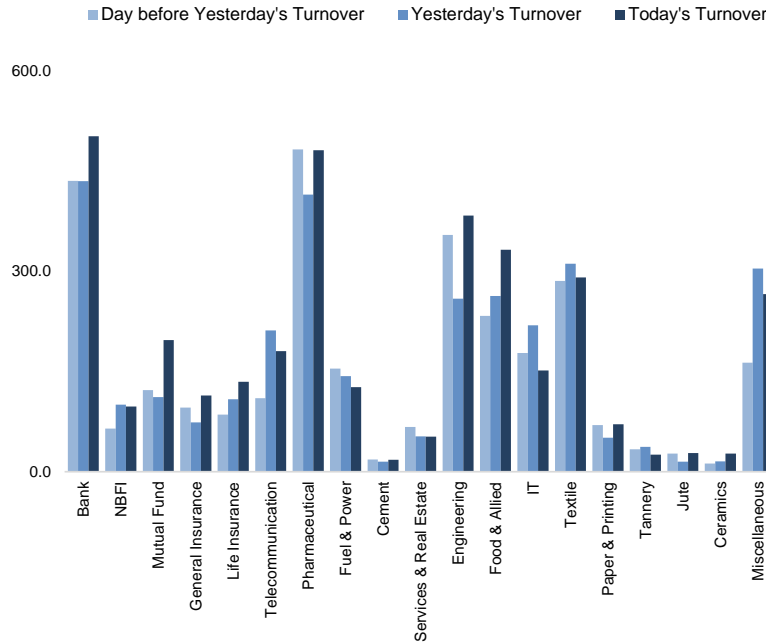
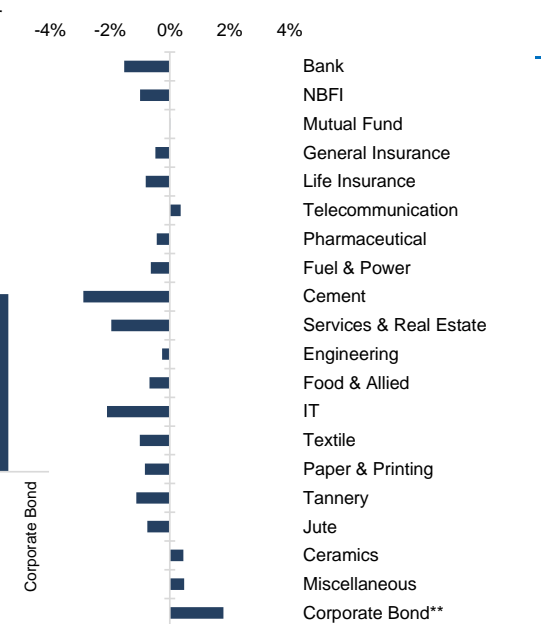


Figure: Sectorial Mcap Change



Market PE 14.7x  
Market PB 1.2x

	Advanced	Declined	Unchanged	Total
All Category	69	282	48	399
A Category (Equity)	43	149	29	221
B Category (Equity)	14	72	5	91
N Category (Equity)	1	3	0	4
Z Category (Equity)	11	58	14	83
Mutual Funds	8	11	18	37
Corporate Bonds	1	0	1	2
Treasury Bonds	1	2	0	3

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,581,307	6,602,932	-0.3%
	Mn USD	53,945	54,122	
Turnover	Mn BDT	3,710	3,240	+14.5%
	Mn USD	30	27	
Volume	Mn Shares	134	117	+14.7%
	No. of Trade	124,412	111,027	+12.1%

\* Based on Traded Scrips  
\* Average Interbank Exchange Rate is BDT 122.00 as of Jan 12, 2025

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\* 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	1,436	1,459	-22.25	-1.53%	36	679,689	10.3%	501.5	14.4%	8.8x	0.7x	GP	452,351	12.6%	86.4	12.8x	7.8x
NBFI	1,146	1,157	-11.50	-0.99%	23	109,162	1.7%	97.4	2.8%	NM	NM	BATBC	191,376	5.3%	15.9	10.9x	3.1x
Mutual Fund	601	601	+0.07	+0.01%	37	27,630	0.4%	196.8	5.6%	NM	0.5x	SQURPHARMA	191,030	5.3%	43.9	9.1x	1.4x
General Insurance	2,686	2,699	-12.98	-0.48%	43	76,688	1.2%	114.0	3.3%	13.9x	1.2x	ROBI	153,471	4.3%	84.9	27.9x	2.3x
Life Insurance	1,759	1,773	-14.31	-0.81%	15	46,781	0.7%	134.6	3.9%	NM	NM	WALTONHIL	147,587	4.1%	4.5	11.3x	1.3x
Telecommunication	5,359	5,340	+19.25	+0.36%	3	628,360	9.5%	180.2	5.2%	14.9x	4.5x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,907	2,919	-12.72	-0.44%	34	551,022	8.4%	480.6	13.8%	14.0x	1.5x	BRACBANK	86,716	2.4%	29.4	7.8x	1.2x
Fuel & Power	1,089	1,096	-6.93	-0.63%	23	288,587	4.4%	126.5	3.6%	14.1x	0.6x	BERGERPBL	83,893	2.3%	0.5	25.2x	5.3x
Cement	1,847	1,902	-54.92	-2.89%	7	88,009	1.3%	18.0	0.5%	14.8x	1.9x	ISLAMIBANK	78,085	2.2%	21.0	16.7x	1.1x
Services & Real Estate	970	990	-19.31	-1.95%	9	53,361	0.8%	52.5	1.5%	17.8x	0.4x	MARICO	73,049	2.0%	3.1	13.8x	9.6x
Engineering	2,475	2,481	-6.34	-0.26%	42	279,218	4.2%	383.1	11.0%	12.2x	0.8x	UPGDCL	70,897	2.0%	0.9	6.8x	1.8x
Food & Allied	16,672	16,786	-114.38	-0.68%	21	305,047	4.6%	332.0	9.5%	16.3x	4.3x	LHB	57,836	1.6%	16.2	14.3x	2.9x
IT	1,996	2,039	-42.80	-2.10%	11	26,324	0.4%	151.5	4.3%	19.4x	1.7x	ICB	50,735	1.4%	18.4	26.1x	1.1x
Textile	1,081	1,092	-10.96	-1.00%	58	112,573	1.7%	290.4	8.3%	NM	0.7x	UNILEVERCL	49,117	1.4%	0.3	66.8x	20.9x
Paper & Printing	3,980	4,013	-33.24	-0.83%	6	17,981	0.3%	70.8	2.0%	NM	0.8x	DUTCHBANGL	45,611	1.3%	8.2	7.3x	0.9x
Tannery	1,985	2,007	-22.52	-1.12%	6	22,112	0.3%	25.5	0.7%	67.7x	1.5x	POWERGRID	35,730	1.0%	3.9	NM	0.2x
Jute	13,610	13,713	-102.61	-0.75%	3	2,996	0.0%	27.9	0.8%	NM	NM	BXPHARMA	34,618	1.0%	14.8	5.8x	0.7x
Ceramics	351	349	+1.59	+0.46%	5	15,741	0.2%	27.2	0.8%	NM	1.0x	PUBALIBANK	33,201	0.9%	42.8	3.5x	0.6x
Miscellaneous	4,313	4,292	+20.72	+0.48%	15	234,208	3.6%	265.4	7.6%	43.0x	1.8x	EBL	32,731	0.9%	9.8	5.0x	0.8x
Corporate Bond**	15,264	14,996	+268.61	+1.79%	16	34,063	0.5%	0.3	0.0%	NM	NM	OLYMPIC	30,631	0.9%	4.5	16.7x	2.7x
Treasury Bond**	585	579	+5.90	+1.02%	234	2,981,092	45.3%	9.9	0.3%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	177.2	+10.0%	53.6	NM	14.9x
MONNOCERA	67.9	+9.2%	16.0	NM	0.8x
UNIONCAP	7.1	+7.6%	10.4	NM	NM
KPPL	14.3	+7.5%	25.0	NM	NM
1STPRIMFMF	29.7	+7.2%	91.3	NM	2.8x
GSPFINANCE	6.1	+7.02%	3.3	NM	0.5x
DACCADYE	14.9	+6.4%	17.4	NM	0x
HAMI	131.8	+5.4%	6.3	NM	14.5x
ORIONINFU	372.2	+4.8%	130.4	NM	23.3x
HRTEX	31.6	+4.3%	23.6	NM	1.7x

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%	22.3x	2.1x
ISLAMIBANK	33,649	2.5%	16.7x	1.1x
BXPHARMA	32,479	2.4%	5.8x	0.7x
BRACBANK	32,157	2.4%	7.8x	1.2x
GP	30,004	2.2%	12.8x	7.8x
LHB	24,690	1.8%	14.3x	2.9x
EBL	24,199	1.8%	5.0x	0.8x
PUBALIBANK	20,448	1.5%	3.5x	0.6x
NBL	16,930	1.2%	NM	2.6x
CITYBANK	16,830	1.2%	4.2x	0.7x
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%	8.1x	0.8x
ORIONPHARM	11,317	0.8%	42.4x	0.4x
ROBI	10,738	0.8%	27.9x	2.3x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FINEFOODS	232.4	-8.7%	194.0	NM	19.5x
ORIONINFU	372.2	+4.8%	130.4	NM	23.3x
MIDLANDBNK	30.6	-9.5%	126.3	17.7x	2.1x
AFTABAUTO	38.7	+4.0%	104.4	NM	0.8x
1STPRIMFMF	29.7	+7.2%	91.3	NM	2.8x
OIMEX	28.7	+1.8%	91.2	28.9x	8.3x
ASIATICLAB	38.1	+0.5%	89.3	16.2x	0.7x
BSC	90.7	-0.3%	86.5	4.8x	0.8x
GP	335.0	+0.8%	86.4	12.8x	7.8x
ROBI	29.3	-0.7%	84.9	27.9x	2.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MIDLANDBNK	30.6	-9.5%	126.3	17.7x	2.1x
FINEFOODS	232.4	-8.7%	194.0	NM	19x
SHURWID	7.3	-7.6%	2.5	NM	0.6x
BAYLEASING	6.4	-7.2%	1.2	NM	1.8x
WMSHIPYARD	9.1	-7.1%	13.5	NM	0.6x
PHOENIXFIN	3.1	-6.1%	8.0	NM	NM
ISNLTD	39.9	-5.9%	3.6	NM	13.7x
FAREASTFIN	3.3	-5.7%	0.7	NM	NM
SBACBANK	8.3	-5.7%	25.7	4.7x	0.6x
PDL	6.7	-5.6%	1.7	NM	0.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ACI	141.6	141.6	1.0	600	84.96
FINEFOODS	233.2	232.3	5.0	197	45.95
RELIANCE1	25.5	21.9	12.0	804	18.06
SUNLIFEINS	68.3	68.0	2.0	242	16.47
EIL	56.0	56.0	7.0	226	12.68
MIDLANDBNK	35.3	31.9	5.0	315	10.42
KBPPWBIL	177.2	159.2	4.0	61	9.79
ORIONINFU	359.1	358.1	3.0	21	7.39
ICBSONALI1	6.7	6.7	1.0	900	6.03
SOUTHEASTB	9.1	9.1	1.0	300	2.73

\* 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	Important DSE News
ACI	141.6	141.6	85.0	600	1	<b>KAY&amp;QUE</b> Pragati Life Insurance Ltd. (where Mr. Tabith M. Awal and Mr. Tafsir M. Awal are common directors of both Kay & Que (Bangladesh) Ltd. and Pragati Life Insurance Ltd.) has expressed its intention to sell 58,560 shares of Kay & Que (Bangladesh) Ltd.
FINEFOODS	233.2	232.3	46.0	197	5	
RELIANCE1	25.5	21.9	18.1	804	12	
SUNLIFEINS	68.3	68.0	16.5	242	2	
EIL	56.0	56.0	12.7	226	7	
MIDLANDBNK	35.3	31.9	10.4	315	5	
KBPPWBIL	177.2	159.2	9.8	61	4	
ORIONINFU	359.1	358.1	7.4	21	3	
ICBSONALI1	6.7	6.7	6.0	900	1	
SOUTHEASTB	9.1	9.1	2.7	300	1	
RUPALILIFE	110.0	110.0	1.5	13	2	
LOVELLO	83.0	83.0	1.3	15	1	
ORIONPHARM	37.0	37.0	1.1	30	1	
BATBC	370.9	326.0	1.1	3	2	
BEACHHATCH	93.0	93.0	1.0	11	1	
ONEBANKPLC	9.3	9.3	0.9	100	1	
TECHNODRUG	37.9	37.9	0.6	15	1	
KDSALTD	33.0	33.0	0.5	16	1	
NLTUBES	95.0	95.0	0.5	5	1	
CITYGENINS	45.8	45.8	0.5	11	1	
ASIATICLAB	38.0	38.0	0.5	13	1	
<b>Total</b>			<b>224.0</b>		<b>54</b>	

**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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