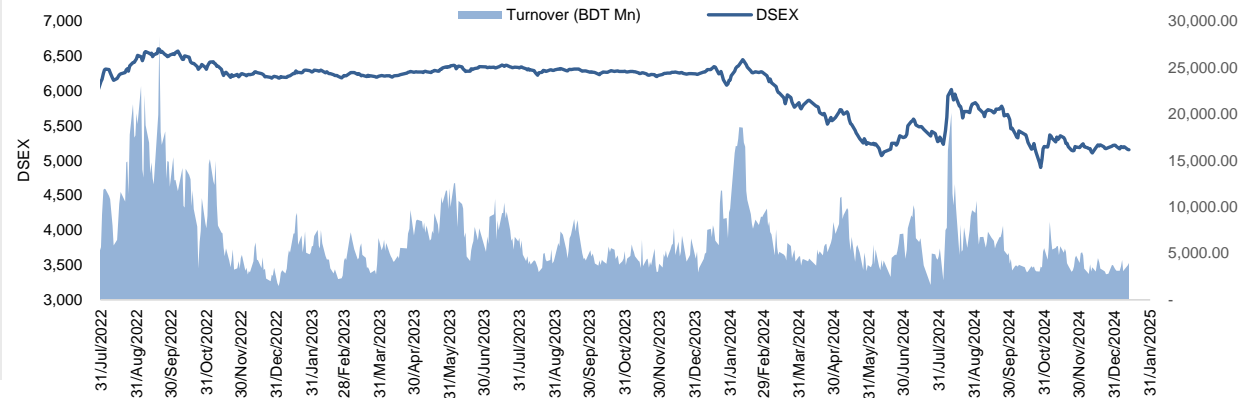


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.08%) lost 4.35 points and closed at 5,151.88. The blue-chip index DS30 (-0.05%), the Shariah-based index DSES (-0.05%), and the large-cap index CDSET (+0.02%) closed at 1,906.10, 1,156.94, and 1,053.80 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 0.70%, followed by Engineering (+0.55%), Food & Allied (+0.34%), Fuel & Power (-0.09%), Pharmaceutical (-0.48%), Bank (-0.61%), and NBF1 (-1.91%), respectively. Block trades contributed 7.7% of the overall market turnover. Grameenphone Ltd. (+1.2%) was the most traded share with a turnover of BDT 386 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,151.88	5,156.23	-4.35	-0.08%	-1.2%
DS30	1,906.10	1,907.04	-0.94	-0.05%	-1.7%
DSES	1,156.94	1,157.55	-0.61	-0.05%	-1.0%
CDSET	1,053.80	1,053.58	+0.22	+0.02%	-1.2%

Figure: Sectorial Turnover (BDT Mn)

■ Day before Yesterday's Turnover ■ Yesterday's Turnover ■ Today's Turnover

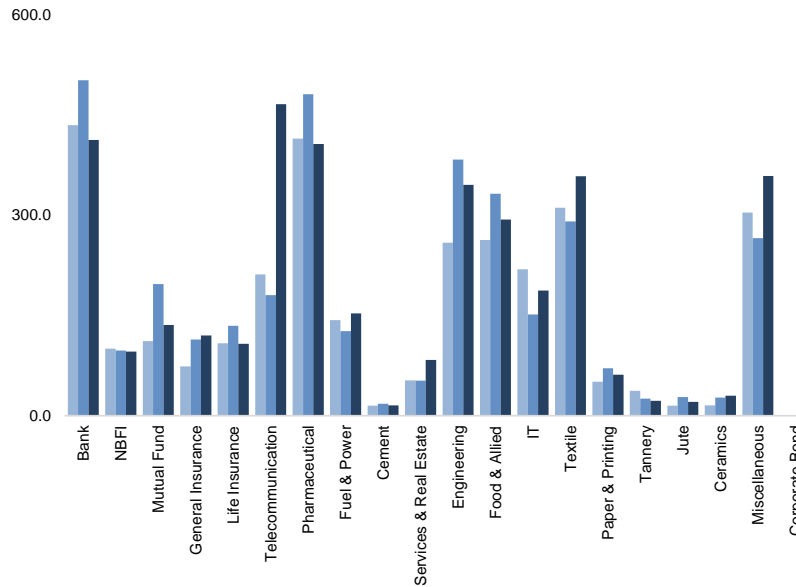
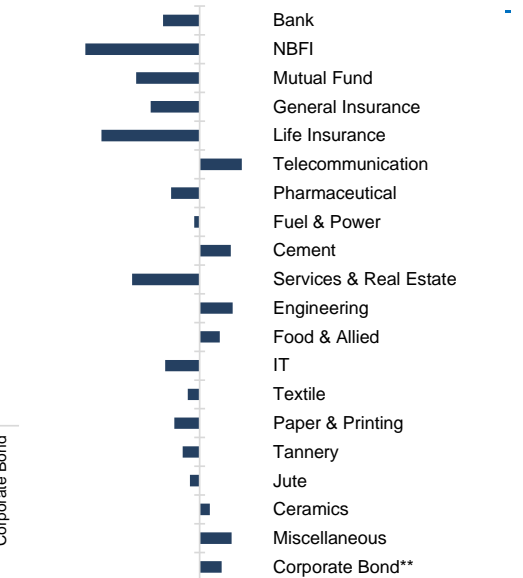


Figure: Sectorial Mcap Change

-3% -2% -1% 0% 1%



	Advanced	Declined	Unchanged	Total
All Category	91	247	62	400
A Category (Equity)	49	142	32	223
B Category (Equity)	22	53	15	90
N Category (Equity)	0	4	0	4
Z Category (Equity)	20	48	15	83
Mutual Funds	4	15	18	37
Corporate Bonds	1	1	0	2
Treasury Bonds	1	3	0	4

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,576,993	6,581,307	-0.1%
	Mn USD	53,910	53,945	
Turnover	Mn BDT	3,978	3,710	+7.2%
	Mn USD	33	30	
Volume	Mn Shares	133	134	-0.3%
No. of Trade		123,108	124,412	-1.0%

* Average Interbank Exchange Rate is BDT 122.00 as of Jan 13, 2025

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Market PE 14.6x
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	1,428	1,436	-8.77	-0.61%	36	675,539	10.3%	412.4	11.2%	8.7x	0.7x	GP	457,887	12.8%	385.8	12.9x	7.9x
NBFI	1,124	1,146	-21.88	-1.91%	23	107,077	1.6%	95.8	2.6%	NM	NM	SQURPHARMA	192,980	5.4%	75.8	9.2x	1.5x
Mutual Fund	595	601	-6.38	-1.06%	37	27,337	0.4%	135.6	3.7%	NM	0.5x	BATBC	191,700	5.4%	28.0	10.9x	3.1x
General Insurance	2,664	2,686	-22.00	-0.82%	43	76,059	1.2%	120.1	3.3%	13.8x	1.2x	ROBI	151,900	4.2%	71.7	27.6x	2.3x
Life Insurance	1,730	1,759	-28.84	-1.64%	15	46,014	0.7%	107.5	2.9%	NM	NM	WALTONHIL	148,798	4.2%	10.6	11.4x	1.3x
Telecommunication	5,396	5,359	+37.64	+0.70%	3	632,774	9.6%	465.6	12.7%	15.0x	4.5x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,893	2,907	-13.85	-0.48%	34	548,397	8.3%	406.3	11.1%	14.0x	1.5x	BRACBANK	86,716	2.4%	55.4	7.8x	1.2x
Fuel & Power	1,088	1,089	-0.99	-0.09%	23	288,324	4.4%	153.0	4.2%	14.1x	0.6x	BERGERPBL	84,004	2.3%	1.0	25.2x	5.3x
Cement	1,856	1,847	+9.63	+0.52%	7	88,468	1.3%	15.3	0.4%	14.9x	1.9x	ISLAMIBANK	76,153	2.1%	27.0	16.3x	1.0x
Services & Real Estate	959	970	-10.96	-1.13%	9	52,758	0.8%	83.5	2.3%	17.6x	0.4x	MARICO	72,595	2.0%	2.1	13.7x	9.5x
Engineering	2,489	2,475	+13.62	+0.55%	42	280,754	4.3%	345.1	9.4%	12.3x	0.9x	RENATA	70,194	2.0%	8.0	22.0x	2.0x
Food & Allied	16,728	16,672	+56.21	+0.34%	21	306,075	4.7%	293.2	8.0%	16.4x	4.3x	LHB	58,533	1.6%	8.2	14.5x	2.9x
IT	1,984	1,996	-11.53	-0.58%	11	26,172	0.4%	187.0	5.1%	19.2x	1.7x	UNILEVERCL	49,595	1.4%	0.3	67.5x	21.1x
Textile	1,079	1,081	-2.14	-0.20%	58	112,350	1.7%	358.1	9.8%	NM	0.7x	ICB	49,520	1.4%	15.0	25.5x	1.1x
Paper & Printing	3,963	3,980	-16.87	-0.42%	6	17,905	0.3%	61.5	1.7%	NM	0.8x	DUTCHBANGL	44,996	1.3%	13.9	7.2x	0.9x
Tannery	1,979	1,985	-5.62	-0.28%	6	22,500	0.3%	22.3	0.6%	67.5x	1.5x	POWERGRID	35,638	1.0%	4.1	NM	0.2x
Jute	13,588	13,610	-22.19	-0.16%	3	2,991	0.0%	20.6	0.6%	NM	NM	BXPHARMA	33,592	0.9%	19.9	5.6x	0.7x
Ceramics	351	351	+0.59	+0.17%	5	15,768	0.2%	29.7	0.8%	NM	1.0x	PUBALIBANK	33,085	0.9%	32.8	3.4x	0.6x
Miscellaneous	4,336	4,313	+23.00	+0.53%	15	235,457	3.6%	358.2	9.8%	43.3x	1.8x	EBL	32,595	0.9%	5.8	5.0x	0.7x
Corporate Bond**	15,320	15,264	+55.84	+0.37%	16	33,870	0.5%	0.5	0.0%	NM	NM	OLYMPIC	30,851	0.9%	5.7	16.8x	2.7x
Treasury Bond**	591	585	+5.81	+0.99%	234	2,980,194	45.3%	0.9	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONNOFABR	17.7	+9.9%	55.3	NM	0.7x
KPPL	15.7	+9.8%	26.6	NM	NM
CVOPRL	109.4	+8.1%	17.9	50.6x	9.8x
MITHUNKNIT	15.2	+7.8%	4.4	NM	4.8x
KBPPWBIL	189.5	+6.9%	217.1	NM	15.9x
ALLTEX	10.5	+6.06%	1.8	52.5x	0.5x
RUNNERAUTO	29.5	+5.4%	8.9	29.2x	0x
EIL	61.9	+5.3%	50.1	43.3x	3.2x
GHAIL	11.0	+4.8%	10.4	NM	0.9x
MONNOAGML	351.0	+4.5%	15.6	NM	3.2x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.2x	1.5x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.9x	3.1x
RENATA	35,002	2.6%	22.0x	2.0x
ISLAMIBANK	33,649	2.5%	16.3x	1.0x
BXPHARMA	32,479	2.4%	5.6x	0.7x
BRACBANK	32,157	2.4%	7.8x	1.2x
GP	30,004	2.2%	12.9x	7.9x
LHB	24,690	1.8%	14.5x	2.9x
EBL	24,199	1.8%	5.0x	0.7x
PUBALIBANK	20,448	1.5%	3.4x	0.6x
NBL	16,930	1.2%	NM	2.6x
CITYBANK	16,830	1.2%	4.3x	0.8x
BSRMLTD	14,210	1.0%	4.7x	0.5x
ALARABANK	13,534	1.0%	12.3x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	16.8x	2.7x
UTTARABANK	11,350	0.8%	8.1x	0.8x
ORIONPHARM	11,317	0.8%	41.8x	0.4x
ROBI	10,738	0.8%	27.6x	2.3x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GP	339.1	+1.2%	385.8	12.9x	7.9x
KBPPWBIL	189.5	+6.9%	217.1	NM	15.9x
FINEFOODS	229.5	-1.2%	135.8	NM	19.2x
AFTABAUTO	39.6	+2.3%	108.7	NM	0.8x
AGNISYSL	26.5	+3.1%	105.4	22.3x	1.6x
SQURPHARMA	217.7	+1.0%	75.8	9.2x	1.5x
MIDLANDBNK	31.2	+2.0%	72.6	18.0x	2.2x
ROBI	29.0	-1.0%	71.7	27.6x	2.3x
AIL	95.9	+3.1%	70.6	40.6x	4.2x
ORIONINFU	364.2	-2.1%	63.6	NM	22.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PADMALIFE	14.6	-8.2%	0.9	NM	NM
GENNEXT	3.2	-5.9%	3.0	NM	0x
RSRMSTEEL	8.9	-5.3%	0.6	NM	0.2x
MBL1STMF	3.8	-5.0%	0.3	NM	0.4x
SONALILIFE	44.1	-4.8%	5.7	NM	NM
SEMLIBLSF	6.3	-4.5%	0.6	NM	0.7x
EMERALDOIL	21.0	-4.5%	9.9	17.9x	NM
PLFSL	2.2	-4.3%	0.3	NM	NM
SINOBANGLA	35.3	-4.3%	7.3	24.5x	1.3x
RUPALILIFE	94.0	-4.3%	23.1	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MONNOFABR	16.5	16.3	33.0	11,254	183.83
EIL	59.2	57.0	10.0	577	33.93
AIL	94.7	84.9	11.0	339	31.18
RELIANCE1	22.6	22.5	12.0	612	13.78
AL-HAJTEX	114.9	114.5	3.0	111	12.67
BEACHHATCH	88.0	88.0	3.0	100	8.80
SEMLLECMF	6.6	6.6	1.0	577	3.81
NLTUBES	81.1	81.1	1.0	30	2.43
LOVELLO	88.8	86.0	3.0	28	2.42
RUPALILIFE	108.0	108.0	1.0	21	2.29

* 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
MONNOFABR	16.5	16.3	183.8	11,254	33	MONNOFABR Monno Ceramic Industries Ltd., a Corporate Sponsor of the Company, has expressed intention to sell its entire holding of 11,254,000 shares of the Company at prevailing market price (In the Block Market) through Dhaka Stock Exchange PLC. (DSE) within next 30 working days.
EIL	59.2	57.0	33.9	577	10	
AIL	94.7	84.9	31.2	339	11	KARNAPHULI Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Karnaphuli Insurance PLC' instead of 'Karnaphuli Insurance Company Limited' with effect from January 14, 2025. Other things (except name) will remain unchanged.
RELIANCE1	22.6	22.5	13.8	612	12	
AL-HAJTEX	114.9	114.5	12.7	111	3	
BEACHHATCH	88.0	88.0	8.8	100	3	
SEMLLECMF	6.6	6.6	3.8	577	1	
NLTUBES	81.1	81.1	2.4	30	1	
LOVELLO	88.8	86.0	2.4	28	3	
RUPALILIFE	108.0	108.0	2.3	21	1	
BEACONPHAR	135.5	135.5	1.4	10	1	
RUPALIBANK	22.8	22.8	1.1	49	1	
BRACBANK	53.9	53.9	1.0	19	1	
FINEFOODS	252.7	252.7	0.8	3	1	
OLYMPIC	155.0	155.0	0.8	5	1	
KBPPWBIL	165.1	165.1	0.7	5	1	
REPUBLIC	30.2	30.2	0.7	23	1	
AMANFEED	31.7	31.7	0.6	20	1	
POWERGRID	43.0	43.0	0.6	14	1	
SUMITPOWER	15.0	15.0	0.5	35	1	
LHB	45.4	45.4	0.5	12	1	
SAPORTL	20.5	20.5	0.5	25	1	
Total			305.9		93	

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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