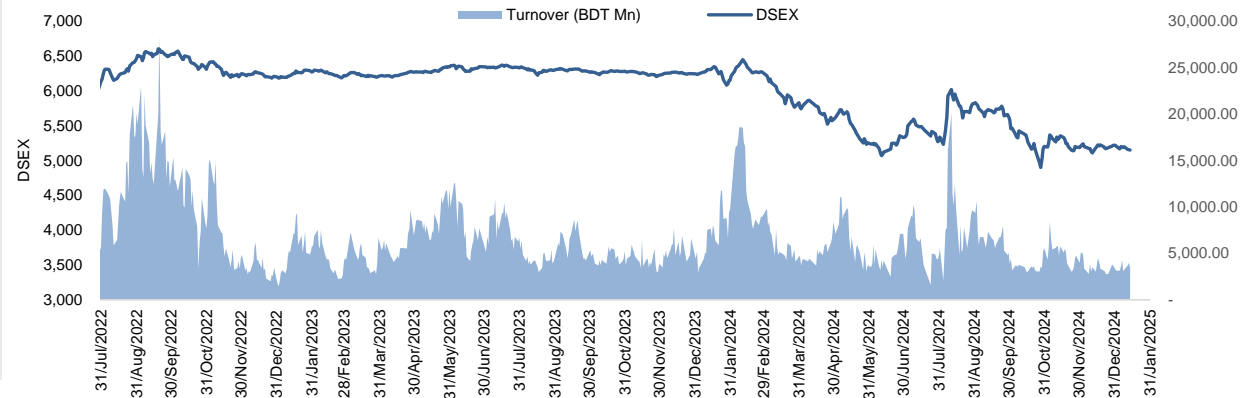


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.02%) lost 1.01 points and closed at 5,150.87. The blue-chip index DS30 (-0.09%), the Shariah-based index DSES (+0.12%), and the large-cap index CDSET (-0.25%) closed at 1,904.42, 1,158.35, and 1,051.21 points, respectively. Most of the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 1.54% followed by NBF1 (-0.45%), Bank (-0.26%), Fuel & Power (-0.10%), Pharmaceutical (-0.02%), Food & Allied (+0.47%), and Engineering (+3.18%), respectively. Block trades contributed 2.2% of the overall market turnover. Khan Brothers PP Woven Bag Industries Limited (+0.1%) was the most traded share with a turnover of BDT 119 million.



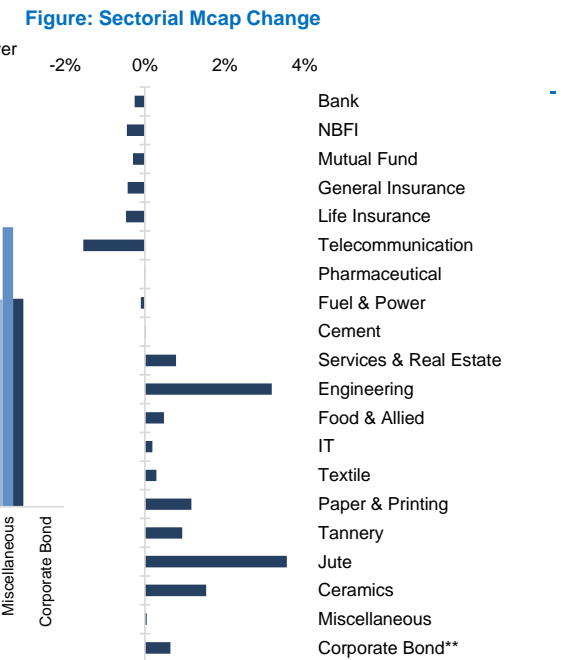
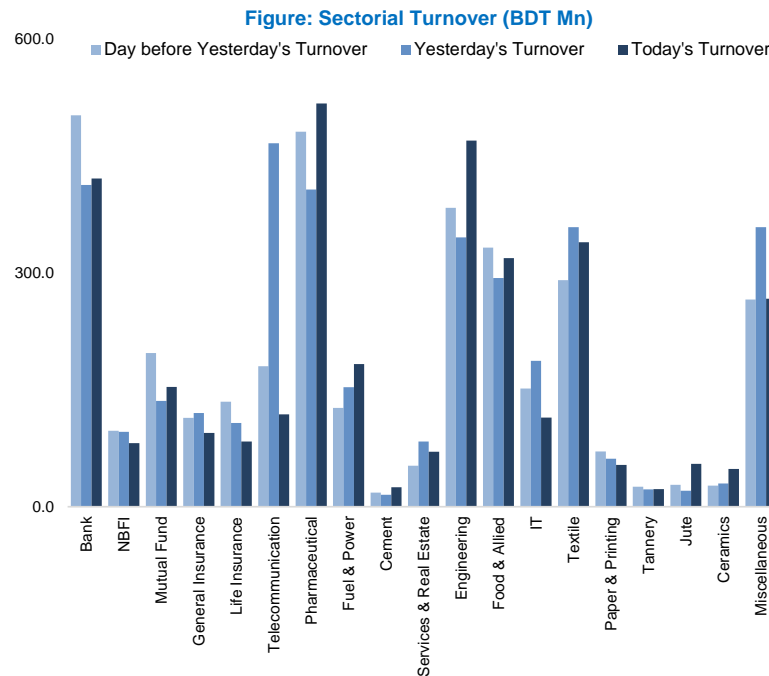
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,150.87	5,151.88	-1.01	-0.02%	-1.3%
DS30	1,904.42	1,906.10	-1.68	-0.09%	-1.8%
DSES	1,158.35	1,156.94	+1.41	+0.12%	-0.9%
CDSET	1,051.21	1,053.80	-2.59	-0.25%	-1.4%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	181	131	84	396
<b>A Category (Equity)</b>	78	90	50	218
<b>B Category (Equity)</b>	51	25	15	91
<b>N Category (Equity)</b>	2	1	1	4
<b>Z Category (Equity)</b>	50	15	18	83
<b>Mutual Funds</b>	8	10	19	37
<b>Corporate Bonds</b>	0	1	1	2
<b>Treasury Bonds</b>	0	0	0	0

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	6,622,529	6,576,993	+0.7%
Mn USD	54,283	53,910	
<b>Turnover</b>			
Mn BDT	3,511	3,978	-11.7%
Mn USD	29	33	
<b>Volume</b>			
Mn Shares	135	133	+1.3%
<b>No. of Trade</b>	129,810	123,108	+5.4%

\* Average Interbank Exchange Rate is BDT 122.00 as of Jan 14, 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	1,424	1,428	-3.66	-0.26%	36	673,805	10.2%	420.4	12.2%	8.7x	0.7x	GP	449,515	12.6%	57.6	12.7x	7.8x
NBFI	1,119	1,124	-5.05	-0.45%	23	106,595	1.6%	81.4	2.4%	NM	NM	BATBC	193,050	5.4%	56.8	11.0x	3.1x
Mutual Fund	593	595	-1.78	-0.30%	37	27,255	0.4%	153.6	4.5%	NM	0.5x	SQRPHARMA	191,119	5.3%	39.0	9.1x	1.4x
General Insurance	2,653	2,664	-11.57	-0.43%	43	75,729	1.2%	94.6	2.8%	13.7x	1.2x	WALTONHIL	155,857	4.4%	12.8	12.0x	1.3x
Life Insurance	1,722	1,730	-8.12	-0.47%	15	45,798	0.7%	83.7	2.4%	NM	NM	ROBI	150,852	4.2%	53.9	27.4x	2.3x
Telecommunication	5,313	5,396	-83.36	-1.54%	3	622,999	9.5%	118.4	3.4%	14.7x	4.4x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,892	2,893	-0.56	-0.02%	34	548,291	8.3%	516.7	15.0%	14.0x	1.5x	BRACBANK	87,247	2.4%	45.8	7.9x	1.2x
Fuel & Power	1,087	1,088	-1.09	-0.10%	23	288,034	4.4%	182.7	5.3%	14.0x	0.6x	BERGERPBL	84,092	2.3%	0.7	25.3x	5.3x
Cement	1,857	1,856	+0.21	+0.01%	7	88,478	1.3%	25.0	0.7%	14.9x	1.9x	ISLAMIBANK	75,670	2.1%	21.1	16.2x	1.0x
Services & Real Estate	967	959	+7.50	+0.78%	9	53,171	0.8%	70.4	2.0%	17.7x	0.4x	MARICO	73,178	2.0%	11.0	13.8x	9.6x
Engineering	2,568	2,489	+79.08	+3.18%	42	289,676	4.4%	469.2	13.7%	12.6x	0.9x	RENATA	69,804	2.0%	36.4	21.9x	2.0x
Food & Allied	16,807	16,728	+79.39	+0.47%	21	307,528	4.7%	318.7	9.3%	16.5x	4.3x	LHB	58,765	1.6%	17.0	14.5x	2.9x
IT	1,988	1,984	+3.75	+0.19%	11	26,221	0.4%	114.2	3.3%	19.3x	1.7x	ICB	49,260	1.4%	17.1	25.3x	1.1x
Textile	1,082	1,079	+3.10	+0.29%	58	112,673	1.7%	339.0	9.9%	NM	0.7x	UNILEVERCL	49,242	1.4%	0.1	67.0x	21.0x
Paper & Printing	4,009	3,963	+46.12	+1.16%	6	18,113	0.3%	53.6	1.6%	NM	0.8x	DUTCHBANGL	44,820	1.3%	6.0	7.2x	0.9x
Tannery	1,997	1,979	+18.48	+0.93%	6	22,256	0.3%	22.5	0.7%	68.1x	1.5x	POWERGRID	35,638	1.0%	5.2	NM	0.2x
Jute	14,071	13,588	+483.07	+3.56%	3	3,097	0.0%	55.0	1.6%	NM	NM	BXPHARMA	33,726	0.9%	30.6	5.6x	0.7x
Ceramics	357	351	+5.40	+1.54%	5	16,010	0.2%	48.5	1.4%	NM	1.0x	PUBALIBANK	32,970	0.9%	24.6	3.4x	0.6x
Miscellaneous	4,338	4,336	+1.96	+0.05%	15	235,563	3.6%	266.5	7.8%	43.3x	1.8x	EBL	32,595	0.9%	2.6	5.0x	0.7x
Corporate Bond**	15,418	15,320	+97.91	+0.64%	16	33,768	0.5%	0.9	0.0%	NM	NM	OLYMPIC	30,991	0.9%	5.2	16.9x	2.8x
Treasury Bond**	597	591	+6.33	+1.07%	234	2,981,597	45.3%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EMERALDOIL	23.1	+10.0%	13.4	19.7x	NM
SINOBANGLA	38.8	+9.9%	18.1	26.9x	1.5x
CENTRALPHL	10.1	+9.8%	34.3	NM	1.4x
KPPL	17.2	+9.6%	15.1	NM	NM
BDTHAI	12.9	+9.3%	31.8	NM	0.4x
OAL	8.3	+9.21%	17.9	NM	0.8x
YPL	10.8	+9.1%	6.9	NM	2x
PLFSL	2.4	+9.1%	2.0	NM	NM
WMSHIPYARD	9.6	+7.9%	13.1	NM	0.6x
SHURWID	7.8	+6.8%	2.3	NM	0.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
UNIONCAP	6.5	-7.1%	10.8	NM	NM
PRAGATILIF	114.1	-5.7%	10.6	NM	NM
AL-HAJTEX	104.1	-5.2%	5.4	NM	12.3x
MIRACLEIND	27.7	-5.1%	14.9	NM	2.2x
FINEFOODS	219.6	-4.3%	111.5	NM	18.4x
ALLTEX	10.1	-3.8%	4.8	50.5x	0.5x
TAKAFULINS	34.3	-3.7%	0.0	23.2x	1.8x
ICBIBANK	2.9	-3.3%	0.0	NM	NM
ASIAPACINS	29.3	-3.3%	0.9	13.7x	1.2x
CAPMIBLMF	8.8	-3.3%	1.8	NM	1.0x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQRPHARMA	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%	21.9x	2.0x
ISLAMIBANK	33,649	2.5%	16.2x	1.0x
BXPHARMA	32,479	2.4%	5.6x	0.7x
BRACBANK	32,157	2.4%	7.9x	1.2x
GP	30,004	2.2%	12.7x	7.8x
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%	4.2x	0.8x
BSRMLTD	14,210	1.0%	4.8x	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%	16.9x	2.8x
UTTARABANK	11,350	0.8%	7.9x	0.8x
ORIONPHARM	11,317	0.8%	41.7x	0.4x
ROBI	10,738	0.8%	27.4x	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
KBPPWBIL	189.6	+0.1%	118.9	NM	15.9x
MIDLANDBNK	30.9	-1.0%	116.2	17.9x	2.1x
FINEFOODS	219.6	-4.3%	111.5	NM	18.4x
AFTABAUTO	40.2	+1.5%	105.0	NM	0.8x
ORIONINFU	372.8	+2.4%	97.9	NM	23.3x
ASIATICLAB	38.4	+3.2%	78.5	16.3x	0.7x
OIMEX	29.2	+2.5%	69.6	29.4x	8.5x
LOVELLO	82.7	+1.0%	69.6	45.0x	6.4x
AOL	19.7	+5.9%	66.7	37.9x	1.0x
1STPRIMFMF	29.9	+3.5%	63.4	NM	2.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RENATA	612.0	612.0	2.0	50	30.60
FINEFOODS	245.1	245.0	6.0	40	9.70
NLTUBES	95.0	94.0	3.0	48	4.59
AIL	95.5	95.5	1.0	36	3.44
RELIANCE1	22.5	22.5	2.0	150	3.38
BEACHHATCH	93.0	87.0	2.0	36	3.20
RUPALILIFE	103.0	95.6	2.0	31	3.10
OLYMPIC	154.0	154.0	1.0	20	3.08
ICBSONALI1	7.0	7.0	1.0	385	2.70
BRACBANK	50.0	50.0	1.0	30	1.50

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RENATA	612.0	612.0	30.6	50	2
FINEFOODS	245.1	245.0	9.7	40	6
NLTUBES	95.0	94.0	4.6	48	3
AIL	95.5	95.5	3.4	36	1
RELIANCE1	22.5	22.5	3.4	150	2
BEACHHATCH	93.0	87.0	3.2	36	2
RUPALILIFE	103.0	95.6	3.1	31	2
OLYMPIC	154.0	154.0	3.1	20	1
ICBSONALI1	7.0	7.0	2.7	385	1
BRACBANK	50.0	50.0	1.5	30	1
SUNLIFEINS	77.2	70.1	1.5	20	2
SBACBANK	9.1	9.1	1.2	126	1
BPML	25.5	25.5	1.1	44	1
BSC	90.9	90.9	0.7	8	1
MIDLANDBNK	32.4	32.4	0.7	21	1
SONALIANSH	217.0	217.0	0.7	3	1
GQBALLPEN	153.0	153.0	0.6	4	1
LOVELLO	81.0	81.0	0.6	7	1
BBS	10.9	10.9	0.6	54	1
IBNSINA	292.5	292.5	0.6	2	1
NAHEEACP	21.0	21.0	0.5	26	1
BEACONPHAR	140.7	140.7	0.5	4	1
<b>Total</b>			<b>76.0</b>		<b>37</b>

**Important DSE News**
**GPHISPAT**

Mohammed Jahangir Alam, a Sponsor Director of the Company, has reported his intention to transfer 2,50,00,000 shares out of his total holding of 11,40,85,394 shares to his daughter Mrs. Sadman Syka Sefa (1,25,00,000 shares) and Mr. Salehin Musfique Sadaf (1,25,00,000 shares), both are General Shareholders of the Company, by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of approval letter by CSE.

**EGEN**

Mr. Rashed Mahmud, a Sponsor of the company, has expressed intention to sell his entire holding of 994,675 shares of the company at prevailing market price (in the Public/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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