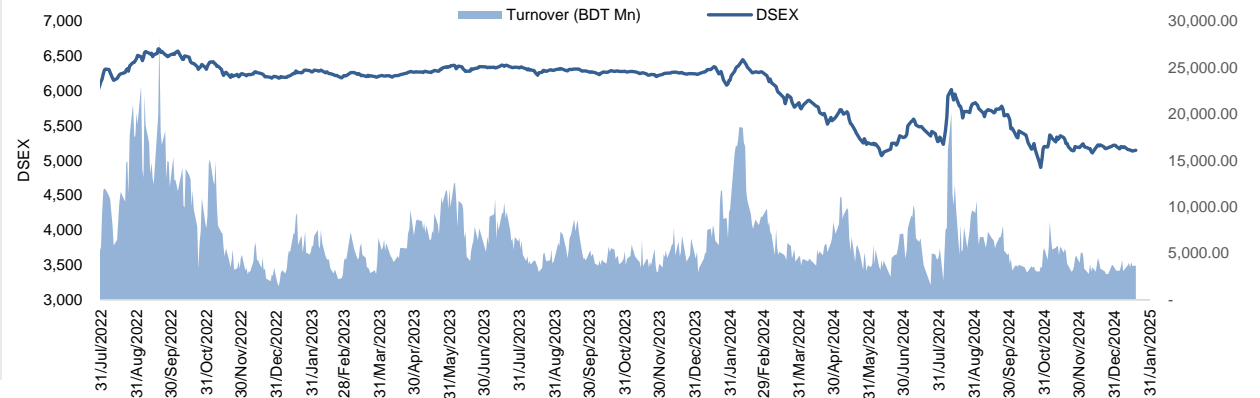


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.22%) gained 11.15 points and closed at 5,145.08. The blue-chip index DS30 (+0.45%), the Shariah-based index DSES (+0.43%), and the large-cap index CDSET (+0.13%) closed at 1,902.89, 1,155.53, and 1,049.34 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 0.45%, followed by Pharmaceutical (+0.43%), Engineering (+0.21%), Food & Allied (-0.08%), Bank (-0.39%), Fuel & Power (-0.53%), and NBF1 (-0.97%), respectively. Block trades contributed 6.1% of the overall market turnover. ADN Telecom Limited (+10.0%) was the most traded share with a turnover of BDT 146 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,145.08	5,133.92	+11.15	+0.22%	-1.4%
DS30	1,902.89	1,894.27	+8.61	+0.45%	-1.9%
DSES	1,155.53	1,150.64	+4.89	+0.43%	-1.1%
CDSET	1,049.34	1,047.99	+1.35	+0.13%	-1.6%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	172	160	64	396
<b>A Category (Equity)</b>	114	65	38	217
<b>B Category (Equity)</b>	30	46	13	89
<b>N Category (Equity)</b>	2	1	1	4
<b>Z Category (Equity)</b>	26	48	12	86
<b>Mutual Funds</b>	6	13	18	37
<b>Corporate Bonds</b>	1	0	1	2
<b>Treasury Bonds</b>	0	0	0	0

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	6,583,857	6,569,403	+0.2%
Mn USD	53,966	53,848	
<b>Turnover</b>			
Mn BDT	3,680	3,637	+1.2%
Mn USD	30	30	
<b>Volume</b>			
Mn Shares	133	148	-10.5%
<b>No. of Trade</b>	132,993	129,464	+2.7%

\* Average Interbank Exchange Rate is BDT 122.00 as of Jan 19, 2025

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Figure: Sectorial Turnover (BDT Mn)

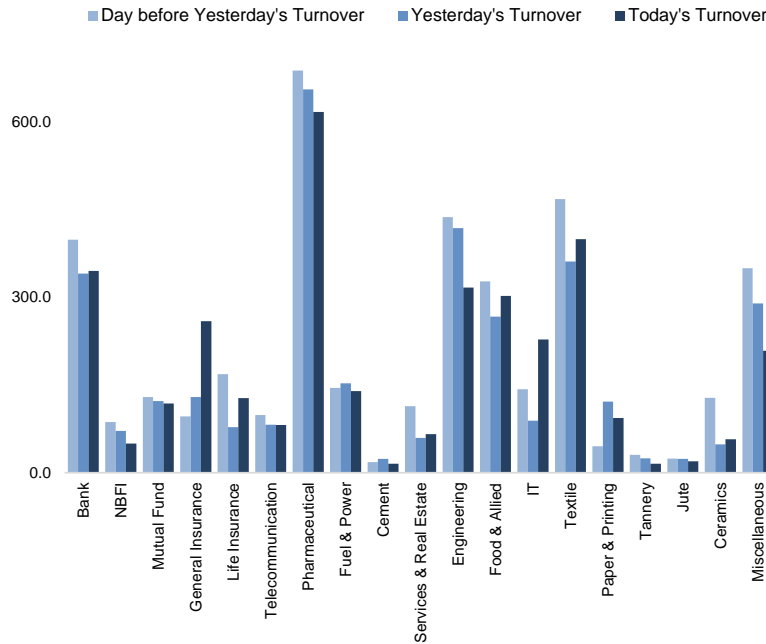
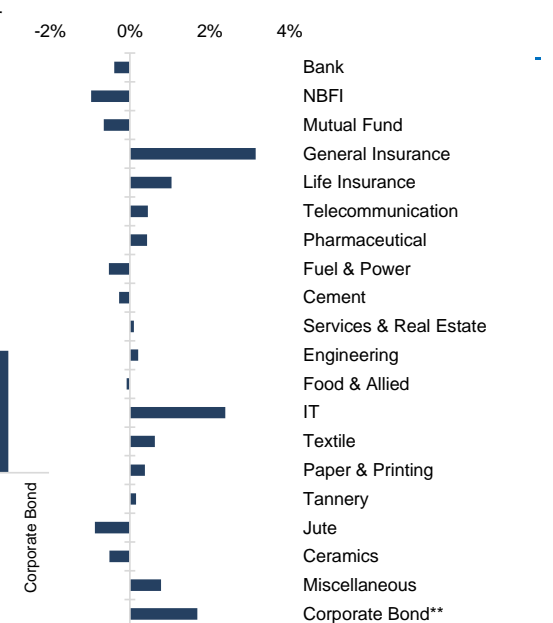


Figure: Sectorial Mcap Change



Market PE 14.9x  
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	1,407	1,413	-5.49	-0.39%	36	665,857	10.1%	344.7	10.0%	8.6x	0.7x	GP	448,975	12.6%	36.8	12.7x	7.8x
NBFI	1,104	1,115	-10.83	-0.97%	23	105,191	1.6%	49.8	1.4%	NM	NM	SQRPHARMA	191,207	5.4%	27.0	9.1x	1.4x
Mutual Fund	582	586	-3.85	-0.66%	37	26,768	0.4%	118.5	3.4%	NM	0.5x	BATBC	189,270	5.3%	14.7	10.8x	3.1x
General Insurance	2,746	2,662	+83.90	+3.15%	43	78,382	1.2%	258.9	7.5%	14.2x	1.2x	WALTONHIL	151,404	4.2%	3.6	11.6x	1.3x
Life Insurance	1,742	1,724	+18.01	+1.04%	15	46,319	0.7%	127.5	3.7%	NM	NM	ROBI	149,281	4.2%	37.3	27.1x	2.3x
Telecommunication	5,300	5,276	+23.94	+0.45%	3	621,430	9.4%	81.4	2.4%	14.7x	4.4x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,897	2,885	+12.38	+0.43%	34	549,301	8.3%	616.3	17.8%	14.0x	1.5x	BRACBANK	86,362	2.4%	18.6	7.8x	1.2x
Fuel & Power	1,081	1,087	-5.75	-0.53%	23	286,402	4.4%	139.4	4.0%	18.5x	0.6x	BERGERPBL	85,307	2.4%	1.0	25.6x	5.4x
Cement	1,838	1,843	-5.02	-0.27%	7	87,593	1.3%	15.4	0.4%	14.7x	1.9x	ISLAMIBANK	74,382	2.1%	16.3	15.9x	1.0x
Services & Real Estate	963	962	+0.98	+0.10%	9	52,985	0.8%	65.7	1.9%	17.7x	0.4x	UPGDCL	74,259	2.1%	8.5	7.1x	1.9x
Engineering	2,543	2,537	+5.23	+0.21%	42	286,826	4.4%	316.1	9.1%	12.5x	0.9x	RENATA	67,648	1.9%	4.5	21.2x	2.0x
Food & Allied	16,566	16,580	-13.59	-0.08%	21	303,246	4.6%	301.9	8.7%	16.2x	4.3x	LHB	57,953	1.6%	7.3	14.3x	2.9x
IT	2,023	1,976	+47.28	+2.39%	11	26,684	0.4%	227.6	6.6%	19.6x	1.7x	UNILEVERCL	49,121	1.4%	0.1	66.8x	20.9x
Textile	1,089	1,083	+6.76	+0.62%	58	113,439	1.7%	399.0	11.5%	NM	0.8x	ICB	48,480	1.4%	11.7	24.9x	1.1x
Paper & Printing	3,990	3,975	+14.94	+0.38%	6	18,025	0.3%	93.5	2.7%	NM	0.8x	DUTCHBANGL	44,205	1.2%	5.3	7.1x	0.9x
Tannery	1,990	1,987	+3.10	+0.16%	6	22,173	0.3%	15.6	0.5%	67.8x	1.5x	PUBALIBANK	34,011	1.0%	52.6	3.5x	0.6x
Jute	13,529	13,649	-119.50	-0.88%	3	2,978	0.0%	19.4	0.6%	NM	NM	BXPHARMA	33,414	0.9%	13.0	5.6x	0.7x
Ceramics	358	360	-1.84	-0.51%	5	16,079	0.2%	57.4	1.7%	NM	1.0x	EBL	32,731	0.9%	4.1	5.0x	0.8x
Miscellaneous	4,334	4,300	+33.73	+0.78%	15	235,355	3.6%	208.2	6.0%	43.2x	1.8x	OLYMPIC	30,671	0.9%	5.4	16.7x	2.7x
Corporate Bond**	15,562	15,303	+258.41	+1.69%	16	34,083	0.5%	0.9	0.0%	NM	NM	CITYBANK	30,444	0.9%	20.9	4.3x	0.8x
Treasury Bond**	621	604	+17.23	+2.85%	233	3,004,269	45.6%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ADNTEL	102.6	+10.0%	146.2	19.0x	3.2x
SICL	21.0	+9.9%	4.1	NM	1.2x
KPPL	18.8	+9.9%	49.3	NM	NM
ICICL	22.9	+9.6%	14.2	20.6x	1.4x
ALLTEX	13.0	+9.2%	11.0	65.0x	0.7x
KOHINOOR	533.9	+8.72%	71.5	33.7x	10.3x
HAKKANIPUL	47.2	+8.0%	23.6	NM	2x
REPUBLIC	29.3	+6.9%	5.6	13.3x	1.5x
ENVOYTEX	39.6	+6.5%	3.1	8.9x	0.7x
DGIC	23.3	+6.4%	4.0	28.8x	1.8x

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%	10.8x	3.1x
RENATA	35,002	2.6%	21.2x	2.0x
ISLAMIBANK	33,649	2.5%	15.9x	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%	12.7x	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	2.5x
CITYBANK	16,830	1.2%	4.3x	0.8x
BSRMLTD	14,210	1.0%	5.2x	0.5x
ALARABANK	13,534	1.0%	12.2x	0.9x
PRIMEBANK	12,985	1.0%	4.4x	0.7x
OLYMPIC	12,616	0.9%	16.7x	2.7x
UTTARABANK	11,350	0.8%	7.6x	0.8x
ORIONPHARM	11,317	0.8%	41.2x	0.4x
ROBI	10,738	0.8%	27.1x	2.3x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ADNTEL	102.6	+10.0%	146.2	19.0x	3.2x
ASIATICLAB	41.7	-0.5%	119.1	17.7x	0.8x
LOVELLO	83.8	+2.6%	104.3	45.6x	6.5x
KBPPWBIL	179.9	+2.5%	102.2	NM	15.1x
ORIONINFU	374.0	-1.9%	97.4	NM	23.4x
AFTABAUTO	40.7	+4.1%	90.6	NM	0.8x
FINEFOODS	194.8	-5.9%	80.8	84.3x	15.9x
CENTRALPHL	11.7	+6.4%	73.4	NM	1.7x
MIDLANDBNK	25.0	-9.4%	72.4	14.5x	1.7x
KOHINOOR	533.9	+8.7%	71.5	33.7x	10.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
POWERGRID	33.3	-15.9%	21.7	NM	0.3x
MIDLANDBNK	25.0	-9.4%	72.4	14.5x	2x
RENWICKJA	654.6	-7.2%	0.0	NM	NM
IBP	9.3	-7.0%	1.9	NM	0.7x
RSRMSTEEL	9.2	-6.1%	0.5	NM	0.2x
BIFC	7.9	-6.0%	0.0	NM	NM
FINEFOODS	194.8	-5.9%	80.8	84.3x	15.9x
MIRACLEIND	29.0	-5.8%	11.6	NM	2.3x
EBL1STMF	3.5	-5.4%	0.6	NM	0.4x
DBH1STMF	3.6	-5.3%	0.3	NM	0.4x

\* 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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ACI	155.8	155.8	1.0	610	95.04
ADNTEL	100.0	100.0	4.0	400	40.00
MIDLANDBNK	30.3	27.0	12.0	792	21.97
EIL	63.0	59.0	9.0	197	11.74
RELIANCE1	23.3	23.0	4.0	330	7.62
BRACBANK	50.1	50.1	1.0	122	6.09
SUNLIFEINS	75.0	61.7	4.0	82	5.60
SQRPHARMA	223.1	223.1	3.0	25	5.58
SINGERBD	119.5	119.5	1.0	31	3.65
EBL	24.2	24.2	2.0	150	3.63

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ACI	155.8	155.8	95.0	610	1
ADNTEL	100.0	100.0	40.0	400	4
MIDLANDBNK	30.3	27.0	22.0	792	12
EIL	63.0	59.0	11.7	197	9
RELIANCE1	23.3	23.0	7.6	330	4
BRACBANK	50.1	50.1	6.1	122	1
SUNLIFEINS	75.0	61.7	5.6	82	4
SQURPHARMA	223.1	223.1	5.6	25	3
SINGERBD	119.5	119.5	3.6	31	1
EBL	24.2	24.2	3.6	150	2
LHB	55.2	55.2	3.3	60	2
ASIATICLAB	42.8	42.2	2.8	65	4
LOVELLO	89.4	81.0	2.4	28	2
FEKDIL	16.6	16.5	1.8	110	2
DBH	40.2	40.2	1.4	36	1
PROVATIINS	37.5	37.5	1.4	37	2
POWERGRID	90.0	90.0	1.3	14	1
ISLAMICFIN	10.6	10.6	1.3	120	1
UNIQUEHRL	47.2	47.2	1.2	25	1
KAY&QUE	196.2	196.2	1.0	5	1
BESTHLDNG	18.8	18.8	0.9	50	1
BEACHHATCH	86.0	86.0	0.9	10	1
<b>Total</b>			<b>222.9</b>		<b>64</b>

**Important DSE News**

**POWERGRID**

The Board of Directors has recommended No Dividend for the year ended June 30, 2024. Date of AGM: 08.03.2025, Time: 10:00 AM, Venue: Digital Platform. Record date: 06.02.2025. The Company has also reported EPS of Tk. (5.01), NAV per share of Tk. 132.61 and NOCFPS of Tk. 12.86 for the year ended June 30, 2024 as against Tk. (10.11) (restated), Tk. 123.32 (restated) and Tk. 12.32 (restated) respectively for the year ended June 30, 2023.

**(Q1 Un-audited):** EPS was Tk. (2.81) for July-September 2024 as against Tk. (1.42) for July-September 2023. Diluted EPS was Tk. (1.11) for July-September 2023. NOCFPS was Tk. 5.74 for July-September 2024 as against Tk. 4.74 (restated) for July-September 2023. NAV per share was Tk. 133.02 as on September 30, 2024 and Tk. 132.61 as on June 30, 2024.

**UTTARAFIN**

The company has informed that Mr. Md. Wali Ullah has been appointed as the Managing Director and CEO of the company with effect from January 15, 2025.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
HRTEX		0.0%	0.0%	Record Date	22-Jan-25
POWERGRID		0.0%	0.0%	Record Date	6-Feb-25

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