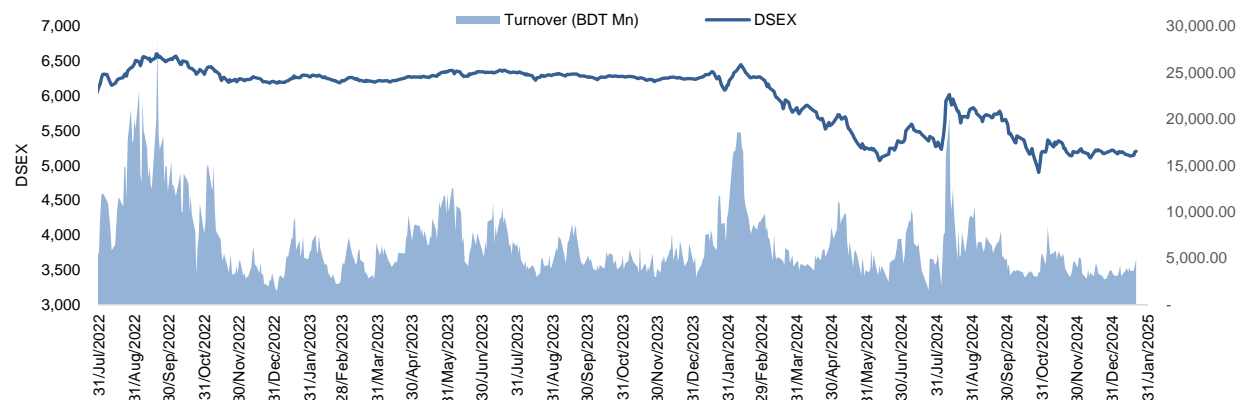


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.13%) gained 6.79 points and closed at 5,202.62. The blue-chip index DS30 (+0.11%), the Shariah-based index DSES (+0.14%), and the large-cap index CDSET (+0.13%) closed at 1,925.25, 1,172.79, and 1,058.22 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 1.26% followed by Telecommunication (+0.45%), Pharmaceutical (+0.16%), Engineering (+0.15%), Bank (+0.10%), Fuel & Power (-0.16%), and Food & Allied (-0.23%), respectively. Block trades contributed 3.1% of the overall market turnover. Orion Infusion Ltd. (+0.7%) was the most traded share with a turnover of BDT 232 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,202.62	5,195.83	+6.79	+0.13%	-0.3%
DS30	1,925.25	1,923.10	+2.15	+0.11%	-0.7%
DSES	1,172.79	1,171.16	+1.64	+0.14%	+0.3%
CDSET	1,058.22	1,056.80	+1.42	+0.13%	-0.7%

	Advanced	Declined	Unchanged	Total
All Category	165	156	80	401
A Category (Equity)	90	90	41	221
B Category (Equity)	41	28	19	88
N Category (Equity)	2	3	0	5
Z Category (Equity)	32	35	20	87
Mutual Funds	15	5	17	37
Corporate Bonds	0	2	0	2
Treasury Bonds	0	5	0	5

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,619,532	6,611,578	+0.1%
Mn USD	54,258	54,193	
Turnover			
Mn BDT	4,991	4,269	+16.9%
Mn USD	41	35	
Volume			
Mn Shares	179	140	+27.6%
No. of Trade	163,900	139,512	+17.5%

* Average Interbank Exchange Rate is BDT 122.00 as of Jan 21, 2025

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Figure: Sectorial Turnover (BDT Mn)

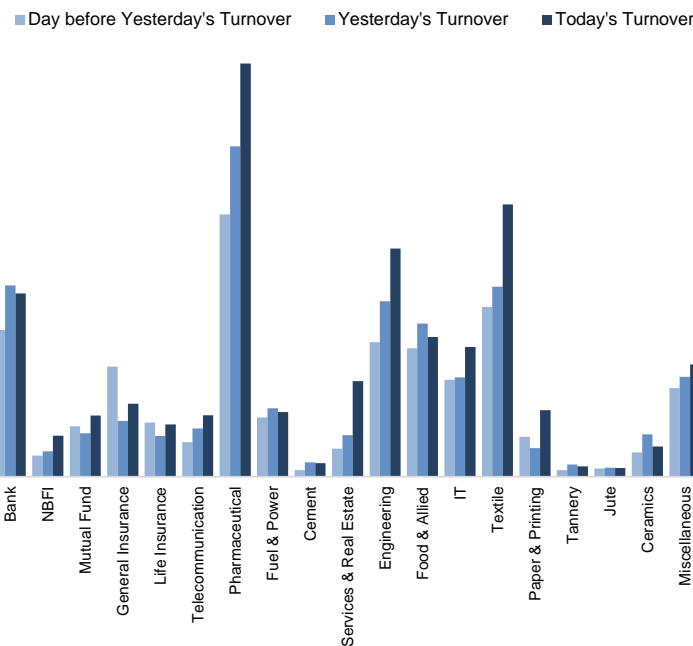
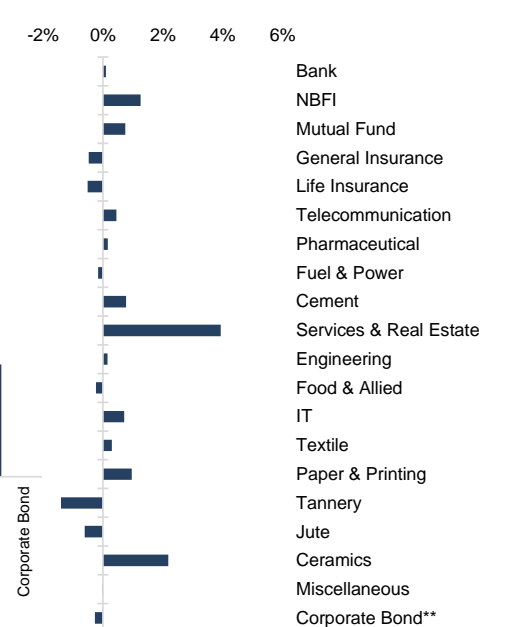


Figure: Sectorial Mcap Change



Market PE 15.0x
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	1,421	1,420	+1.44	+0.10%	36	672,560	10.2%	430.7	8.9%	8.7x	0.7x	GP	453,431	12.6%	55.0	12.8x	7.9x
NBFI	1,131	1,117	+14.05	+1.26%	23	107,747	1.6%	96.6	2.0%	NM	NM	SQURPHARMA	192,803	5.4%	46.7	9.2x	1.5x
Mutual Fund	587	582	+4.34	+0.74%	37	26,971	0.4%	143.8	3.0%	NM	0.5x	BATBC	189,054	5.3%	28.0	10.8x	3.1x
General Insurance	2,728	2,741	-13.05	-0.48%	43	77,875	1.2%	171.5	3.5%	14.1x	1.2x	WALTONHIL	154,584	4.3%	9.8	11.9x	1.3x
Life Insurance	1,729	1,738	-8.82	-0.51%	15	45,985	0.7%	123.0	2.5%	NM	NM	ROBI	148,757	4.1%	81.9	27.0x	2.3x
Telecommunication	5,336	5,313	+23.75	+0.45%	3	625,736	9.5%	144.5	3.0%	14.8x	4.4x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,936	2,932	+4.72	+0.16%	34	556,685	8.4%	970.5	20.1%	14.2x	1.5x	BRACBANK	87,424	2.4%	71.9	7.9x	1.2x
Fuel & Power	1,075	1,076	-1.70	-0.16%	23	284,632	4.3%	151.7	3.1%	18.4x	0.6x	BERGERPBL	84,974	2.4%	0.6	25.5x	5.3x
Cement	1,867	1,853	+14.29	+0.77%	7	88,988	1.3%	31.6	0.7%	15.0x	1.9x	ISLAMIBANK	75,348	2.1%	19.8	16.1x	1.0x
Services & Real Estate	1,017	978	+38.49	+3.93%	9	55,927	0.8%	224.8	4.6%	18.6x	0.4x	MARICO	73,134	2.0%	5.7	13.8x	9.6x
Engineering	2,604	2,600	+3.94	+0.15%	42	293,718	4.4%	536.1	11.1%	12.8x	0.9x	RENATA	67,625	1.9%	9.5	21.2x	2.0x
Food & Allied	16,576	16,615	-38.93	-0.23%	21	303,298	4.6%	328.5	6.8%	16.2x	4.3x	LHB	58,185	1.6%	11.5	14.4x	2.9x
IT	2,087	2,072	+14.66	+0.71%	11	27,526	0.4%	304.8	6.3%	20.2x	1.7x	ICB	50,301	1.4%	31.9	25.9x	1.1x
Textile	1,102	1,099	+3.26	+0.30%	58	114,817	1.7%	639.9	13.2%	NM	0.8x	UNILEVERCL	48,980	1.4%	0.1	66.6x	20.8x
Paper & Printing	4,119	4,079	+39.29	+0.96%	6	18,608	0.3%	156.2	3.2%	NM	0.8x	DUTCHBANGL	45,347	1.3%	5.8	7.3x	0.9x
Tannery	2,018	2,047	-28.66	-1.40%	6	22,487	0.3%	24.3	0.5%	68.8x	1.5x	BXPHARMA	35,154	1.0%	65.1	5.9x	0.7x
Jute	13,697	13,781	-83.84	-0.61%	3	3,015	0.0%	20.7	0.4%	NM	NM	PUBALIBANK	33,548	0.9%	19.2	3.5x	0.6x
Ceramics	378	370	+8.09	+2.18%	5	16,980	0.3%	70.9	1.5%	NM	1.0x	EBL	33,003	0.9%	7.5	5.1x	0.8x
Miscellaneous	4,330	4,331	-1.18	-0.03%	15	235,127	3.6%	263.6	5.5%	43.2x	1.8x	BEACONPHAR	30,654	0.9%	46.9	59.8x	4.8x
Corporate Bond**	15,565	15,606	-41.48	-0.27%	16	34,089	0.5%	0.0	0.0%	NM	NM	OLYMPIC	30,551	0.8%	21.5	16.6x	2.7x
Treasury Bond**	654	637	+16.46	+2.58%	233	3,006,278	45.4%	2.7	0.1%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BESTHLDNG	18.9	+9.9%	100.8	17.5x	0.4x
IFADAUTOS	22.3	+9.9%	47.1	NM	0.6x
COPPERTECH	19.2	+9.7%	15.4	23.7x	1.4x
SHURWID	8.0	+9.6%	3.3	NM	0.6x
TUNGHAI	3.0	+7.1%	0.1	NM	NM
SONARGAON	34.7	+6.77%	34.4	93.8x	1.8x
BPPL	9.9	+6.5%	4.0	38.1x	0x
PREMIERCEM	50.3	+6.3%	7.8	7.6x	0.8x
ORIONPHARM	37.5	+5.6%	91.2	44.6x	0.4x
STYLECRAFT	56.3	+5.6%	6.9	NM	9.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AOL	17.1	-10.0%	3.7	32.9x	0.9x
BIFC	7.8	-7.1%	0.6	NM	NM
ASIATICLAB	38.9	-6.9%	128.0	16.5x	0.7x
FINEFOODS	201.9	-5.3%	58.4	87.4x	16.5x
AFTABAUTO	39.4	-4.6%	107.2	NM	0.8x
CLICL	34.6	-4.2%	2.5	NM	NM
MONNOFABR	16.9	-4.0%	61.1	NM	0.7x
NEWLINE	7.6	-3.8%	18.8	NM	0.3x
MIDLANDBNK	26.5	-3.6%	80.4	15.3x	1.8x
DACCADYE	17.0	-3.4%	14.2	NM	0.5x

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%	10.8x	3.1x
RENATA	35,002	2.6%	21.2x	2.0x
ISLAMIBANK	33,649	2.5%	16.1x	1.0x
BXPHARMA	32,479	2.4%	5.9x	0.7x
BRACBANK	32,157	2.4%	7.9x	1.2x
GP	30,004	2.2%	12.8x	7.9x
LHB	24,690	1.8%	14.4x	2.9x
EBL	24,199	1.8%	5.1x	0.8x
PUBALIBANK	20,448	1.5%	3.5x	0.6x
NBL	16,930	1.2%	NM	2.6x
CITYBANK	16,830	1.2%	4.3x	0.8x
BSRMLTD	14,210	1.0%	5.4x	0.6x
ALARABANK	13,534	1.0%	12.3x	0.9x
PRIMEBANK	12,985	1.0%	4.4x	0.7x
OLYMPIC	12,616	0.9%	16.6x	2.7x
UTTARABANK	11,350	0.8%	7.8x	0.8x
ORIONPHARM	11,317	0.8%	44.6x	0.4x
ROBI	10,738	0.8%	27.0x	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
ORIONINFU	382.8	+0.7%	232.2	NM	23.9x
ADNTEL	109.7	+3.3%	167.3	20.3x	3.4x
FEKDIL	18.9	+2.2%	130.8	8.6x	0.9x
ASIATICLAB	38.9	-6.9%	128.0	16.5x	0.7x
KBPPWBIL	176.9	-3.0%	122.0	NM	14.9x
AFTABAUTO	39.4	-4.6%	107.2	NM	0.8x
BESTHLDNG	18.9	+9.9%	100.8	17.5x	0.4x
DSSL	11.9	+5.3%	97.4	38.4x	0.6x
ORIONPHARM	37.5	+5.6%	91.2	44.6x	0.4x
LOVELLO	85.7	-0.8%	89.4	46.7x	6.6x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ADNTEL	106.0	100.5	7.0	455	46.06
BEACHHATCH	92.1	87.5	10.0	247	22.47
LOVELLO	87.5	82.0	6.0	262	21.85
EIL	58.0	58.0	1.0	180	10.44
SQURPHARMA	225.5	224.6	3.0	30	6.74
AIL	95.5	94.5	3.0	69	6.56
RELIANCE1	22.0	21.2	5.0	284	6.14
KBPPWBIL	185.0	185.0	1.0	15	2.78
PRAGATIINS	58.1	47.7	2.0	42	2.18
BEXIMCO	99.2	99.1	3.0	20	2.03

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ADNTEL	106.0	100.5	46.1	455	7
BEACHHATCH	92.1	87.5	22.5	247	10
LOVELLO	87.5	82.0	21.9	262	6
EIL	58.0	58.0	10.4	180	1
SQURPHARMA	225.5	224.6	6.7	30	3
AIL	95.5	94.5	6.6	69	3
RELIANCE1	22.0	21.2	6.1	284	5
KBPPWBIL	185.0	185.0	2.8	15	1
PRAGATIINS	58.1	47.7	2.2	42	2
BEXIMCO	99.2	99.1	2.0	20	3
BSC	95.9	81.0	2.0	23	2
SUNLIFEINS	64.9	64.9	1.9	30	2
PRAGATILIF	121.0	115.6	1.8	16	2
ORIONINFU	409.0	390.0	1.7	4	2
MARICO	2,329.1	2,329.1	1.6	1	1
KAY&QUE	228.3	191.7	1.6	8	2
MJLBD	96.9	95.9	1.6	17	2
GQBALLPEN	143.0	143.0	1.4	10	1
RUPALILIFE	101.2	101.2	1.3	13	1
BATBC	380.7	378.8	1.1	3	2
CENTRALINS	44.7	44.7	1.1	24	1
BATASHOE	930.1	930.1	1.1	1	1
Total			155.0		73

Important DSE News

CVOPRL

(Q2 Un-audited): EPS was Tk. 0.96 for October-December 2024 as against Tk. 0.66 for October-December 2023; EPS was Tk. 1.88 for July-December 2024 as against Tk. 1.76 for July-December 2023. NOCFPS was Tk. 2.00 for July-December 2024 as against Tk. 0.78 for July-December 2023. NAV per share was Tk. 11.19 as on December 31, 2024 and Tk. 10.31 as on June 30, 2024.

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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