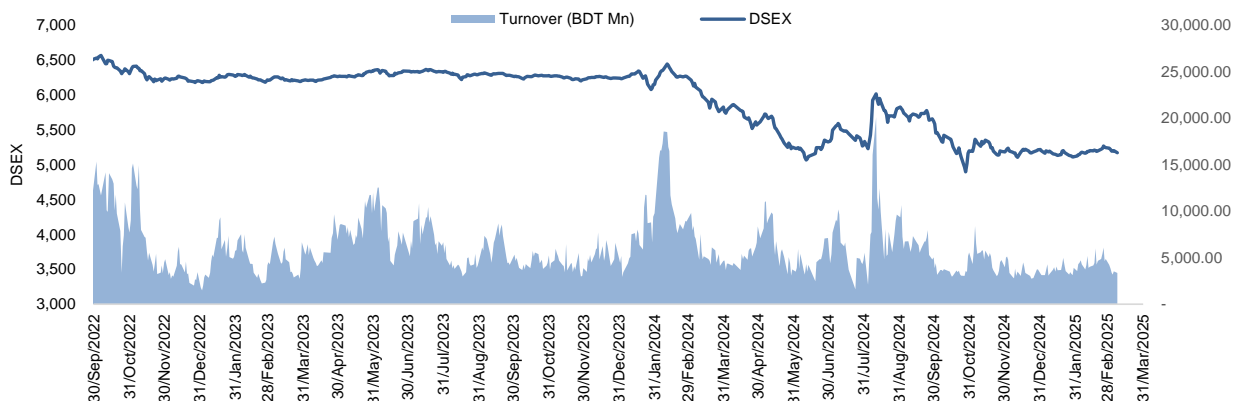


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.57%) lost 29.52 points and closed at 5,174.44. The blue-chip index DS30 (-0.49%), the Shariah-based index DSES (-0.38%), and the large-cap index CDSET (-0.22%) closed at 1,880.39, 1,156.44, and 1,044.41 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 1.19% followed by Engineering (-1.03%), Food & Allied (-0.85%), Bank (-0.61%), Telecommunication (-0.47%), Pharmaceutical (-0.22%), and Fuel & Power (+0.33%), respectively. Block trades contributed 9.0% of the overall market turnover. Orion Infusion Ltd. (+1.5%) was the most traded share with a turnover of BDT 180 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,174.44	5,203.96	-29.52	-0.57%	-0.8%
DS30	1,880.39	1,889.68	-9.29	-0.49%	-3.1%
DSES	1,156.44	1,160.89	-4.45	-0.38%	-1.1%
CDSET	1,044.41	1,046.72	-2.31	-0.22%	-2.0%

	Advanced	Declined	Unchanged	Total
All Category	58	274	67	399
A Category (Equity)	33	146	40	219
B Category (Equity)	12	61	7	80
N Category (Equity)	0	1	0	1
Z Category (Equity)	13	66	20	99
Mutual Funds	3	11	22	36
Corporate Bonds	1	2	0	3
Treasury Bonds	1	1	0	2

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,789,339	6,821,475	-0.5%
	Mn USD	55,650	55,914	
Turnover	Mn BDT	3,367	3,530	-4.6%
	Mn USD	28	29	
Volume	Mn Shares	124	129	-3.6%
No. of Trade		114,850	109,066	+5.3%

* Average Interbank Exchange Rate is BDT 122.00 as of Mar 09, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Istiaz Uddin Research Associate (880) 1708805202 mistiaz.uddin@bracepl.com
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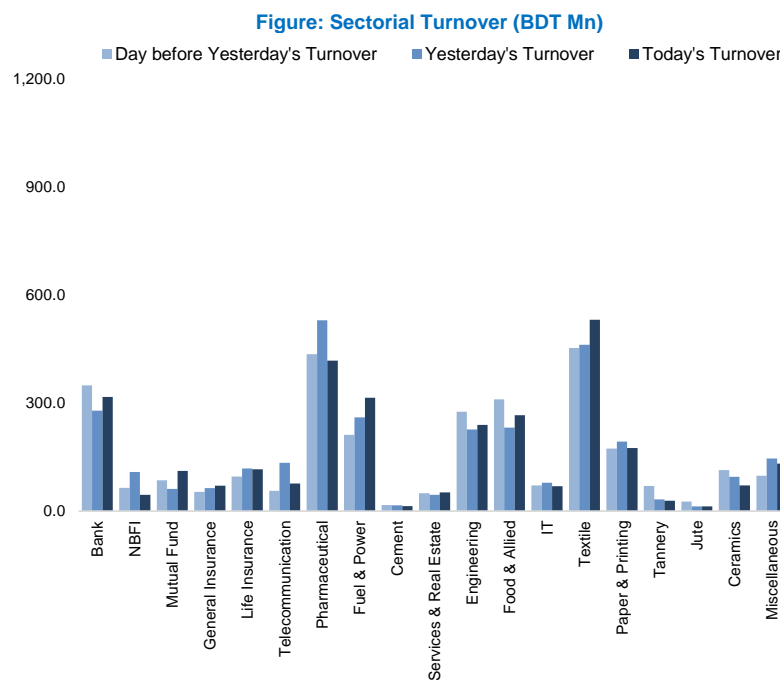
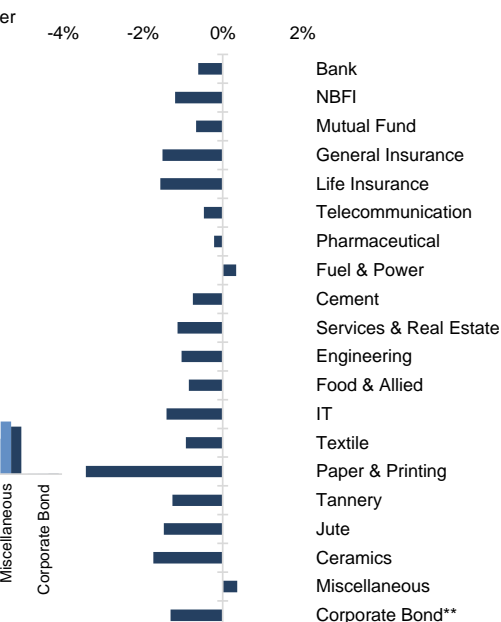


Figure: Sectorial Mcap Change



Market PE 14.8x
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	1,431	1,440	-8.84	-0.61%	36	676,938	10.0%	317.2	10.4%	8.7x	0.7x	GP	437,362	12.4%	18.5	12.0x	6.8x
NBFI	1,080	1,093	-13.04	-1.19%	23	102,869	1.5%	44.8	1.5%	NM	NM	SOURPHARMA	192,803	5.4%	35.4	8.6x	1.5x
Mutual Fund	569	572	-3.82	-0.67%	37	26,137	0.4%	111.9	3.7%	NM	0.5x	BATBC	175,122	4.9%	18.8	10.0x	3.0x
General Insurance	2,512	2,550	-38.55	-1.51%	43	71,699	1.1%	70.3	2.3%	12.7x	1.1x	ROBI	150,852	4.3%	56.7	21.5x	2.2x
Life Insurance	1,733	1,760	-27.46	-1.56%	15	46,091	0.7%	115.8	3.8%	NM	NM	WALTONHIL	141,770	4.0%	2.5	10.7x	1.3x
Telecommunication	5,220	5,244	-24.72	-0.47%	3	612,043	9.0%	76.6	2.5%	13.7x	4.1x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,869	2,876	-6.27	-0.22%	34	543,959	8.0%	418.0	13.6%	13.1x	1.5x	BRACBANK	91,848	2.6%	26.7	8.3x	1.2x
Fuel & Power	1,116	1,113	+3.73	+0.33%	23	295,690	4.4%	314.6	10.3%	16.2x	0.6x	BERGERPBL	85,410	2.4%	2.0	24.9x	5.9x
Cement	1,816	1,830	-13.72	-0.75%	7	86,563	1.3%	14.1	0.5%	16.6x	1.9x	MARICO	75,294	2.1%	0.9	13.5x	9.9x
Services & Real Estate	1,009	1,020	-11.57	-1.13%	9	55,483	0.8%	51.9	1.7%	19.7x	0.4x	ISLAMIBANK	69,874	2.0%	10.9	15.0x	1.0x
Engineering	2,459	2,484	-25.68	-1.03%	42	277,342	4.1%	239.5	7.8%	12.6x	0.9x	RENATA	57,968	1.6%	9.0	19.6x	1.7x
Food & Allied	15,743	15,878	-134.94	-0.85%	21	288,055	4.2%	266.1	8.7%	15.7x	4.3x	LHB	56,791	1.6%	8.4	14.1x	2.8x
IT	1,987	2,016	-28.36	-1.41%	11	26,211	0.4%	68.9	2.2%	20.3x	1.7x	UNILEVERCL	48,330	1.4%	1.2	72.4x	19.8x
Textile	1,141	1,152	-10.65	-0.92%	58	118,861	1.8%	531.5	17.3%	80.8x	0.8x	ICB	44,924	1.3%	5.0	35.4x	1.0x
Paper & Printing	4,480	4,639	-158.98	-3.43%	6	20,239	0.3%	175.4	5.7%	NM	0.9x	DUTCHBANGL	44,820	1.3%	5.1	7.2x	0.9x
Tannery	1,946	1,970	-24.81	-1.26%	6	21,678	0.3%	29.0	0.9%	NM	1.6x	BXPBARMA	35,020	1.0%	5.9	5.5x	0.7x
Jute	12,385	12,570	-185.49	-1.48%	3	2,726	0.0%	13.1	0.4%	NM	NM	EBL	34,904	1.0%	2.8	5.3x	0.8x
Ceramics	395	402	-6.98	-1.74%	5	17,731	0.3%	71.0	2.3%	NM	1.1x	PUBALIBANK	33,548	0.9%	2.2	3.5x	0.6x
Miscellaneous	4,285	4,270	+15.46	+0.36%	15	232,702	3.4%	131.7	4.3%	95.2x	1.9x	POWERGRID	33,171	0.9%	10.4	NM	0.3x
Corporate Bond**	14,751	14,946	-195.36	-1.31%	16	32,307	0.5%	1.2	0.0%	NM	NM	CITYBANK	30,560	0.9%	17.8	4.3x	0.8x
Treasury Bond**	1,552	1,538	+14.19	+0.92%	234	3,233,520	47.6%	1.6	0.1%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SAFKOSPINN	13.1	+8.3%	6.3	NM	NM
TITAGAS	22.1	+7.3%	17.9	NM	0.2x
ATCSLGF	7.5	+7.1%	70.6	NM	0.7x
LINDEBD	1,077.0	+5.2%	135.4	2.7x	4.9x
HRTEX	38.7	+4.9%	24.0	NM	2.1x
SOUTHEASTB	9.4	+4.44%	19.8	18.3x	0.4x
PROGRESLIF	47.8	+4.4%	4.0	NM	NM
ALARABANK	22.8	+3.6%	3.4	14.9x	1.1x
BDTHAI	15.3	+3.4%	40.2	NM	0.5x
FAREASTFIN	3.3	+3.1%	0.2	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SOURPHARMA	108,958	7.7%	8.6x	1.5x
ISLAMIBANK	74,730	5.3%	15.0x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.0x	3.0x
WALTONHIL	46,773	3.3%	10.7x	1.3x
BRACBANK	46,489	3.3%	8.3x	1.2x
GP	44,708	3.2%	12.0x	6.8x
RENATA	32,968	2.3%	19.6x	1.7x
BXPBARMA	23,409	1.7%	5.5x	0.7x
PUBALIBANK	22,905	1.6%	3.5x	0.6x
CITYBANK	21,020	1.5%	4.3x	0.8x
LHB	20,953	1.5%	14.1x	2.8x
OLYMPIC	20,496	1.5%	15.7x	2.5x
ALARABANK	18,282	1.3%	14.9x	1.1x
BEACONPHAR	17,838	1.3%	50.0x	4.4x
PRIMEBANK	16,142	1.1%	4.4x	0.7x
ROBI	14,876	1.1%	21.5x	2.2x
UTTARABANK	13,699	1.0%	8.7x	0.8x
NBL	13,055	0.9%	NM	2.4x
BSRMLTD	12,852	0.9%	5.1x	0.5x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	392.7	+1.5%	179.6	NM	25.6x
AIL	66.7	-10.0%	144.7	25.0x	2.9x
LINDEBD	1,077.0	+5.2%	135.4	2.7x	4.9x
BEACHHATCH	117.6	+0.8%	84.5	34.5x	7.8x
FEKDIL	18.4	+2.8%	72.7	6.6x	0.9x
ATCSLGF	7.5	+7.1%	70.6	NM	0.7x
MIDLANDBNK	17.0	-8.1%	65.0	9.8x	1.2x
ROBI	28.8	-1.0%	56.7	21.5x	2.2x
HAKKANIPUL	64.6	+0.9%	56.0	NM	2.6x
KBPPWBIL	157.0	-2.0%	55.6	NM	13.2x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AIL	66.7	-10.0%	144.7	25.0x	2.9x
SALAMCRST	18.2	-9.5%	26.0	NM	1x
MIDLANDBNK	17.0	-8.1%	65.0	9.8x	1.2x
BPML	33.0	-8.1%	27.9	NM	0.5x
RSRMSTEEL	11.2	-6.7%	2.1	NM	0.2x
IBP	11.7	-6.4%	40.9	NM	0.9x
1STPRIMFMF	18.9	-6.0%	13.1	NM	1.8x
TOSRIFA	20.6	-5.5%	7.9	38.9x	0.7x
HAMI	93.3	-5.4%	0.9	NM	10.3x
NHFIL	27.6	-5.2%	12.3	58.7x	1.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ORIONINFU	383.2	358.0	15.0	472	175.96
BEACHHATCH	110.0	105.2	19.0	473	51.49
NRBBANK	13.7	13.7	2.0	1,323	18.13
SEMLLECMF	6.7	6.6	6.0	2,365	15.81
EIL	54.3	54.2	2.0	200	10.85
AIL	80.0	79.9	4.0	90	7.20
UPGDCL	131.4	130.7	3.0	48	6.30
SONALILIFE	50.1	49.0	2.0	114	5.67
JAMUNABANK	17.5	17.5	1.0	200	3.50
BSC	85.5	85.5	1.0	20	1.71

* 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
ORIONINFU	383.2	358.0	176.0	472	15
BEACHHATCH	110.0	105.2	51.5	473	19
NRBBANK	13.7	13.7	18.1	1,323	2
SEMLLECMF	6.7	6.6	15.8	2,365	6
EIL	54.3	54.2	10.9	200	2
AIL	80.0	79.9	7.2	90	4
UPGDCL	131.4	130.7	6.3	48	3
SONALILIFE	50.1	49.0	5.7	114	2
JAMUNABANK	17.5	17.5	3.5	200	1
BSC	85.5	85.5	1.7	20	1
SPCERAMICS	18.8	18.8	1.0	54	2
LRBDL	14.4	14.4	0.7	50	1
BEACONPHAR	125.0	125.0	0.7	6	1
RDFOOD	28.5	28.5	0.7	24	1
CITYGENINS	39.2	39.2	0.7	17	1
EASTERNINS	45.9	45.9	0.6	13	1
LOVELLO	86.0	86.0	0.6	7	1
ZEALBANGLA	93.0	93.0	0.5	6	1
CVOPRL	117.0	117.0	0.5	4	1
Total			302.6		65

Important DSE News

HAMI

The company has informed that it has entered into an agreement with Lubricant Asia Limited to rent out the 6,752 sft. of space (partial) out of 35,000 sft. total spare of the factory situated in 49/A, Sagarika Road, Fouzderhat Heavy I/A, Pahartali, Chattagram-4202 for two years. The rent would be Taka 20.00 (Taka Twenty per sft.) with effect from March 01, 2025.

FIRSTFIN

The company has informed that in accordance with the decision of the Board of Directors of the company and the subsequent approval of Bangladesh Bank, Mr. Shah Md. Abdul Bari has been appointed and Joined as Chief Executive Officer of the company with effect from 04 March, 2025.

MIDASFIN

The Company has informed that Ms. Rokia Afzal Rahman, one of the Sponsors and former Chairman of the company passed away on 05.04.2023. Her 326,872 shares out of her total holding of 331,306 shares of the company will be transmitted to the account of her nominee Mr. Imran Faiz Rahman (son of Late Rokia Afzal Rahman) by way of nomination.

UCB2PBOND

UCB 2nd Perpetual Bond will be placed in 'A' category from existing 'N' category with effect from March 10, 2025 as the issuer of the bond has reported disbursement of coupon amount for the period from February 07, 2024 to August 06, 2024 and August 07, 2024 to February 06, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
SUMITPOWER		0.0%	10.0%	Record Date	10-Mar-25
ROBI		0.0%	15.0%	Record Date	16-Mar-25
UNILEVERCL		0.0%	520.0%	Record Date	6-Apr-25
PIONEERINS		0.0%	25.0%	Record Date	7-Apr-25

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