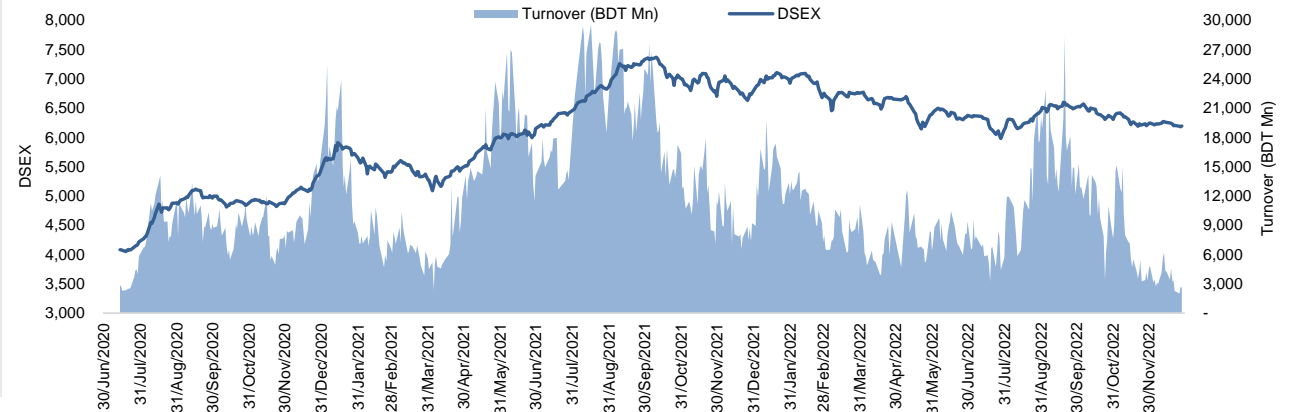


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.25%) gained 15.54 points and closed at 6,195.82. The blue-chip index DS30 (+0.13%), the Shariah-based index DSES (+0.25%), and the large-cap index CDSET (+0.07%) closed at 2,194.20, 1,355.70, and 1,214.09 points, respectively. All the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 0.37% followed by Food & Allied (+0.23%), Engineering (+0.06%), Bank (+0.06%), Fuel & Power (+0.06%), NBF1 (+0.03%), and Telecommunication (0.00%), respectively. Block trades contributed 5.2% of the overall market turnover. Orion Infusion Ltd. (+8.7%) was the most traded share with a turnover of BDT 237 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,195.82	6,180.27	+15.54	+0.25%	-8.3%
DS30	2,194.20	2,191.45	+2.75	+0.13%	-13.4%
DSES	1,355.70	1,352.35	+3.35	+0.25%	-5.3%
CDSET	1,214.09	1,213.25	+0.84	+0.07%	-10.7%

	Advanced	Declined	Unchanged	Total
All Category	75	91	170	336
A Category (Equity)	52	42	128	222
B Category (Equity)	15	38	33	86
N Category (Equity)	5	1	2	8
Z Category (Equity)	3	10	7	20
Mutual Funds	0	5	15	20
Corporate Bonds	2	0	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,606,101	7,597,669	+0.1%
	Mn USD	71,810	71,730	
Turnover	Mn BDT	2,582	2,696	-4.2%
	Mn USD	24	25	
Volume	Mn Shares	34	32	+8.2%
	No. of Trade	57,870	40,734	+42.1%

* Average Interbank Exchange Rate is BDT 105.92 as of Dec 27, 2022

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Figure: Sectorial Turnover (BDT Mn)

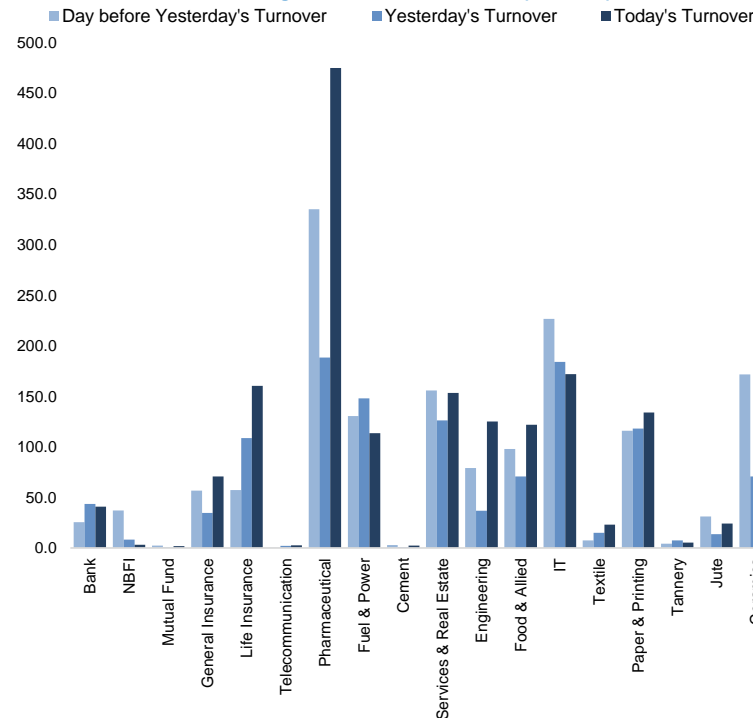
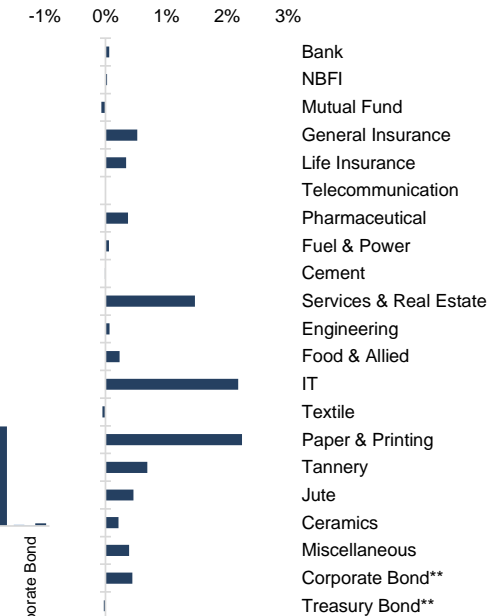


Figure: Sectorial Mcap Change



Market PE 17.2x

Market PB 1.5x

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	1,426	1,425	+0.90	+0.06%	34	666,195	8.8%	40.9	2.2%	7.7x	0.7x	GP	386,996	8.7%	0.5	11.2x	9.1x
NBFI	1,927	1,927	+0.51	+0.03%	23	188,030	2.5%	3.2	0.2%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	852	853	-0.57	-0.07%	37	38,536	0.5%	1.8	0.1%	NM	0.8x	BATBC	280,098	6.3%	0.3	16.8x	6.7x
General Insurance	3,180	3,163	+16.55	+0.52%	42	92,798	1.2%	70.6	3.9%	15.6x	1.5x	SQURPHARMA	185,977	4.2%	1.2	10.0x	1.7x
Life Insurance	2,487	2,479	+8.36	+0.34%	14	69,748	0.9%	160.4	8.8%	NM	NM	ROBI	157,138	3.5%	0.2	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	2.7	0.1%	15.4x	4.9x	RENATA	139,689	3.1%	0.3	28.1x	4.6x
Pharmaceutical	3,739	3,726	+13.75	+0.37%	33	716,442	9.4%	474.9	26.0%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.1	13.6x	3.8x
Fuel & Power	1,694	1,693	+1.01	+0.06%	23	446,666	5.9%	113.4	6.2%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.5	8.2x	1.2x
Cement	2,319	2,319	-0.21	-0.01%	7	111,384	1.5%	2.4	0.1%	33.5x	2.5x	BERGERPBL	79,492	1.8%	4.0	25.8x	6.9x
Services & Real Estate	1,767	1,741	+25.60	+1.47%	8	69,813	0.9%	153.4	8.4%	39.5x	0.9x	MARICO	76,277	1.7%	1.3	21.3x	44.9x
Engineering	4,499	4,497	+2.91	+0.06%	42	528,086	6.9%	125.0	6.8%	38.6x	1.8x	ICB	74,119	1.7%	0.0	68.1x	1.6x
Food & Allied	21,220	21,171	+49.18	+0.23%	21	378,117	5.0%	121.8	6.7%	21.4x	7.4x	BEACONPHAR	65,951	1.5%	14.5	81.1x	10.7x
IT	2,931	2,868	+62.61	+2.18%	11	38,208	0.5%	171.9	9.4%	27.2x	2.6x	BXPBARMA	65,355	1.5%	14.4	12.8x	1.6x
Textile	1,624	1,625	-0.82	-0.05%	58	170,806	2.2%	23.1	1.3%	31.0x	1.0x	BRACBANK	57,619	1.3%	0.0	10.9x	1.0x
Paper & Printing	10,318	10,091	+226.46	+2.24%	6	39,754	0.5%	134.1	7.3%	44.7x	2.0x	ISLAMIBANK	53,130	1.2%	5.4	10.8x	0.8x
Tannery	3,104	3,082	+21.25	+0.69%	6	32,779	0.4%	5.3	0.3%	39.8x	3.0x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	14,875	14,807	+68.20	+0.46%	3	3,639	0.0%	24.2	1.3%	NM	128.4x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	706	705	+1.52	+0.22%	5	32,668	0.4%	98.9	5.4%	34.2x	1.9x	POWERGRID	37,347	0.8%	0.1	38.5x	0.4x
Miscellaneous	4,062	4,047	+15.79	+0.39%	15	227,888	3.0%	98.4	5.4%	12.4x	1.8x	SUMITPOWER	36,308	0.8%	0.2	10.0x	0.9x
Corporate Bond**	89	88	+0.39	+0.44%	9	36,540	0.5%	2.7	0.1%	NM	NM	BSCCL	36,098	0.8%	2.0	14.9x	3.4x
Treasury Bond**	98	98	-0.03	-0.03%	252	3,140,144	41.3%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ICICL	25.6	+9.9%	0.0	28.3x	1.6x	SQURPHARMA	121,685	7.3%	10.0x	1.7x	ORIONINFU	485.0	+8.7%	236.5	NM	32.8x
ORIONINFU	485.0	+8.7%	236.5	NM	32.8x	BATBC	74,086	4.4%	16.8x	6.7x	ORIONPHARM	81.6	+2.3%	120.7	20.2x	0.9x
EGEN	51.2	+7.3%	8.6	35.6x	2.3x	BEXIMCO	70,355	4.2%	8.2x	1.2x	MONNOCERA	124.4	+1.7%	98.5	NM	1.5x
NAVANAPHAR	74.2	+6.2%	25.2	19.8x	1.6x	RENATA	68,196	4.1%	28.1x	4.6x	INTRACO	39.7	+3.9%	97.1	32.2x	3.1x
MONOSPOOL	282.1	+6.1%	19.4	42.1x	6.1x	BEACONPHAR	46,165	2.8%	81.1x	10.7x	BPML	74.4	+5.2%	89.5	19.9x	1.0x
DULAMIACOT	73.7	+5.7%	0.0	58.0x	NM	BXPBARMA	45,631	2.7%	12.8x	1.6x	PRAGATILIF	120.9	+1.1%	75.7	NM	NM
EHL	77.4	+5.6%	44.4	12.5x	1x	GP	38,700	2.3%	11.2x	9.1x	SEAPEARL	186.7	+0.2%	65.2	69.1x	14.4x
KOHINOOR	433.7	+5.5%	9.0	40.0x	7.9x	BRACBANK	30,976	1.8%	10.9x	1.0x	MONNOAGML	828.3	-0.6%	62.4	NM	4.7x
BPML	74.4	+5.2%	89.5	19.9x	1.0x	LHBL	26,581	1.6%	18.4x	4.1x	GENEXIL	78.2	+3.7%	61.5	22.6x	4.3x
ADVENT	24.6	+5.1%	44.8	23.0x	1.7x	ISLAMIBANK	23,866	1.4%	10.8x	0.8x	ADVENT	24.6	+5.1%	44.8	23.0x	1.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
TALLUSPIN	9.9	-1.0%	0.0	NM	0.5x	NBL	19,116	1.1%	NM	0.6x	RENATA	1,238.0	1,218.0	2.0	166	201.72
RENWICKJA	964.3	-1.0%	0.0	NM	NM	PUBALIBANK	18,525	1.1%	5.5x	0.6x	BRACBANK	38.0	34.7	2.0	4,018	139.48
EASTRNLAB	1,621.2	-1.0%	0.2	NM	8.6x	CITYBANK	17,615	1.1%	4.5x	0.8x	ORIONINFU	407.1	407.0	5.0	226	91.99
LIBRAINFU	866.1	-1.0%	0.0	NM	0.7x	ROBI	15,714	0.9%	NM	2.4x	BATBC	479.8	479.8	3.0	102	48.99
CAPMBDBLMF	10.0	-1.0%	0.0	NM	1.2x	OLYMPIC	14,772	0.9%	19.3x	2.5x	ORIONINFU	407.1	407.0	5.0	226	91.99
NORTHNRINS	40.0	-1.0%	0.0	21.4x	1.9x	ALARABANK	14,609	0.9%	14.6x	1.1x	BATBC	479.8	479.8	3.0	102	48.99
RAHIMTEXT	211.1	-1.0%	0.0	NM	5.9x	BSRMLTD	14,417	0.9%	62.6x	0.7x	BSCCL	216.1	199.8	21.0	208	43.78
PRIMETEX	40.4	-1.0%	0.0	NM	0.5x	UPGDCL	13,547	0.8%	13.6x	3.8x	BEACONPHAR	309.0	260.6	3.0	119	34.00
BEACHHATCH	40.5	-1.0%	0.0	69.8x	4.0x	SUMITPOWER	13,358	0.8%	10.0x	0.9x	SONALIPAPR	600.0	569.1	2.0	51	30.51
SAVAREFR	253.5	-1.0%	0.0	NM	2.7x	PRIMEBANK	13,186	0.8%	6.2x	0.7x	PHARMAID	790.7	790.7	4.0	28	21.74
											IPDC	63.3	51.9	2.0	280	15.67
											GP	286.5	263.0	4.0	50	13.72

* 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)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade	Important DSE News
RENATA	1,238.0	1,218.0	201.7	166	2	QUEENSOUTH The Company has informed that shareholders of the company in its 20th AGM held on December 22, 2022 at 10:00 AM approved the installation of the auto dispensing and modernized salt recovery systems for the company. After installation of auto dispensing and modernized salt recovery systems, the dyes, chemical and water consumption will be reduced about BDT 11.00 million/monthly which will directly help to increase gross profit of the company. The cost associated with the installation of the auto dispensing and modernized salt recovery systems is BDT 160.00 million. SKICL Sena Kalyan Sangstha, one of the Sponsors of the Company, has expressed its intention to buy 06 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days. NTC The Company will be placed in 'B' category from existing 'A' category with effect from December 29, 2022 as the Company has approved 7.50% cash dividend for the year ended June 30, 2022.
BRACBANK	38.0	34.7	139.5	4,018	2	
ORIONINFU	407.1	407.0	92.0	226	5	
BATBC	479.8	479.8	49.0	102	3	
BSCCL	216.1	199.8	43.8	208	21	
BEACONPHAR	309.0	260.6	34.0	119	3	
SONALIPAPR	600.0	569.1	30.5	51	2	
PHARMAID	790.7	790.7	21.7	28	4	
IPDC	63.3	51.9	15.7	280	2	
GP	286.5	263.0	13.7	50	4	
KOHINOOR	410.5	410.5	12.3	30	1	
MARICO	2,368.0	2,361.0	11.6	5	5	
BEXIMCO	115.5	104.1	7.6	70	8	
KDSALTD	82.0	76.9	6.7	84	4	
PDL	11.1	11.1	4.8	428	1	
IFIC	12.0	12.0	4.3	360	1	
SQURPHARMA	205.1	204.0	4.2	21	7	
METROSPIN	41.0	40.5	4.2	103	5	
ADNTEL	118.0	100.3	4.2	38	2	
BENGALWTL	26.5	26.5	3.8	145	2	
SONALILIFE	59.9	59.9	3.6	61	1	
GSPFINANCE	27.3	27.3	3.6	132	1	
Total			753.1		134	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Wata Chemicals Limited	-	0.0%	20.0%	Record Date	29-Dec-22
Queen South Textile Mills Limited	-	6.0%	0.0%	Record Date	02-Jan-23
Desh Garmants Ltd.	-	10.0%	0.0%	Record Date	03-Jan-23

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