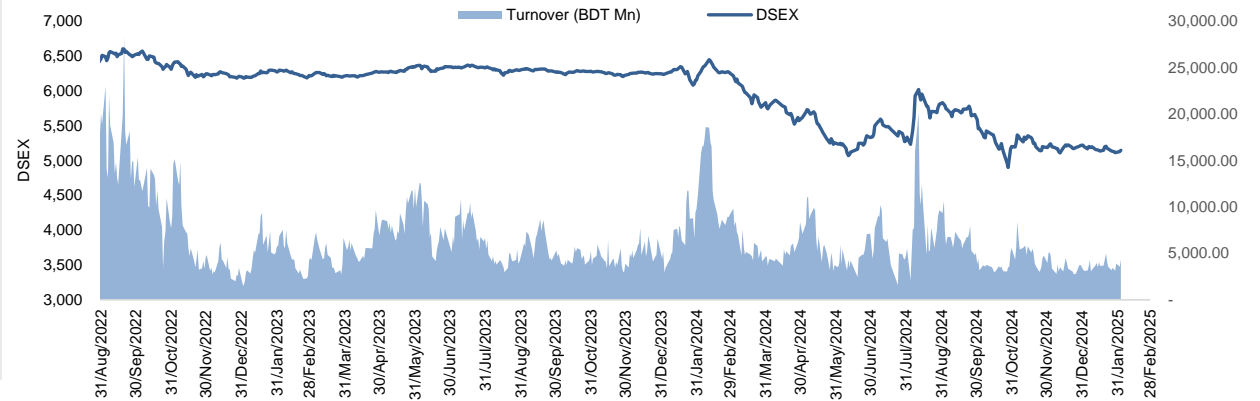


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.38%) gained 19.7 points and closed at 5,145.84. The blue-chip index DS30 (+0.08%), the Shariah-based index DSES (+0.33%), and the large-cap index CDSET (+0.14%) closed at 1,909.80, 1,139.24, and 1,048.87 points, respectively. All the large-cap sectors posted positive performance today. NBFi booked the highest gain of 1.14% followed by Bank (+0.79%), Engineering (+0.47%), Pharmaceutical (+0.35%), Fuel & Power (+0.03%), Food & Allied (+0.02%), and Telecommunication (+0.00%), respectively. Block trades contributed 3.3% of the overall market turnover. Grameenphone Ltd. (+0.1%) was the most traded share with a turnover of BDT 188 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,145.84	5,126.15	+19.70	+0.38%	-1.4%
DS30	1,909.80	1,908.34	+1.46	+0.08%	-1.5%
DSES	1,139.24	1,135.55	+3.69	+0.33%	-2.5%
CDSET	1,048.87	1,047.40	+1.47	+0.14%	-1.6%

	Advanced	Declined	Unchanged	Total
All Category	219	113	67	399
A Category (Equity)	123	65	31	219
B Category (Equity)	46	30	11	87
N Category (Equity)	3	0	1	4
Z Category (Equity)	47	18	24	89
Mutual Funds	19	6	12	37
Corporate Bonds	0	1	3	4
Treasury Bonds	0	0	0	0

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,686,154	6,658,968	+0.4%
Mn USD	54,805	54,582	
Turnover			
Mn BDT	4,313	3,564	+21.0%
Mn USD	35	29	
Volume			
Mn Shares	184	154	+19.4%
No. of Trade	143,024	125,969	+13.5%

* Average Interbank Exchange Rate is BDT 122.00 as of Feb 03, 2025

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Figure: Sectorial Turnover (BDT Mn)

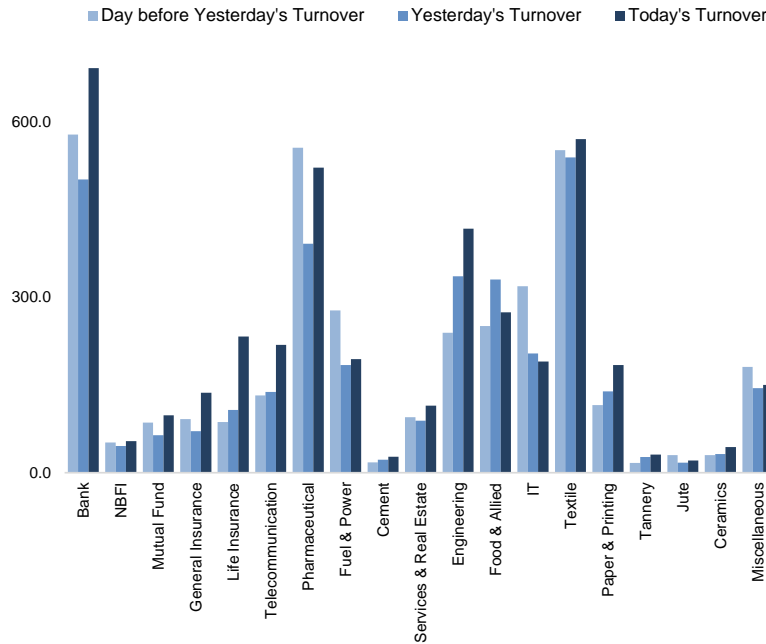
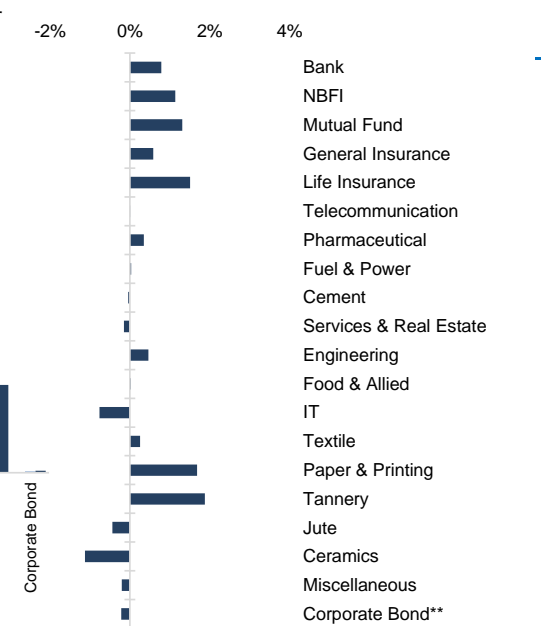


Figure: Sectorial Mcap Change



Market PE 15.4x
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	1,432	1,420	+11.16	+0.79%	36	677,358	10.1%	691.1	16.6%	8.7x	0.7x	GP	455,051	12.8%	188.0	12.8x	7.9x
NBFI	1,066	1,054	+12.02	+1.14%	23	101,549	1.5%	53.9	1.3%	NM	NM	SQURPHARMA	192,626	5.4%	53.6	8.6x	1.5x
Mutual Fund	569	562	+7.40	+1.32%	37	26,170	0.4%	98.0	2.3%	NM	0.5x	BATBC	190,566	5.4%	23.0	10.9x	3.1x
General Insurance	2,644	2,629	+15.45	+0.59%	43	75,482	1.1%	136.6	3.3%	13.7x	1.2x	ROBI	148,757	4.2%	28.1	27.0x	2.3x
Life Insurance	1,755	1,729	+26.13	+1.51%	15	46,670	0.7%	232.6	5.6%	NM	NM	WALTONHIL	147,496	4.1%	2.2	11.2x	1.3x
Telecommunication	5,345	5,345	+0.07	+0.00%	3	626,777	9.4%	218.3	5.2%	14.8x	4.5x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,845	2,835	+9.99	+0.35%	34	539,320	8.1%	521.4	12.5%	13.0x	1.5x	BRACBANK	91,140	2.6%	56.0	8.2x	1.2x
Fuel & Power	1,072	1,072	+0.36	+0.03%	23	284,043	4.2%	194.1	4.7%	24.8x	0.6x	BERGERPBL	84,658	2.4%	0.2	24.7x	5.8x
Cement	1,812	1,813	-0.74	-0.04%	7	86,343	1.3%	27.5	0.7%	16.6x	1.9x	MARICO	73,515	2.1%	6.4	13.1x	9.7x
Services & Real Estate	982	983	-1.48	-0.15%	9	53,994	0.8%	114.8	2.8%	19.2x	0.4x	UPGDCL	70,433	2.0%	2.3	6.6x	1.9x
Engineering	2,494	2,482	+11.56	+0.47%	42	281,305	4.2%	417.0	10.0%	12.8x	0.9x	RENATA	57,704	1.6%	21.5	19.5x	1.7x
Food & Allied	16,589	16,586	+2.76	+0.02%	21	303,530	4.5%	274.2	6.6%	16.5x	4.3x	LHB	56,791	1.6%	12.2	14.1x	2.8x
IT	1,969	1,984	-15.10	-0.76%	11	25,971	0.4%	189.9	4.6%	20.2x	1.7x	UNILEVERCL	48,926	1.4%	0.1	66.6x	20.8x
Textile	1,130	1,127	+2.87	+0.25%	58	117,635	1.8%	569.9	13.7%	70.7x	0.8x	DUTCHBANGL	46,402	1.3%	22.5	7.4x	0.9x
Paper & Printing	4,027	3,960	+66.64	+1.68%	6	18,193	0.3%	184.2	4.4%	NM	0.8x	ICB	45,358	1.3%	9.2	35.8x	1.0x
Tannery	1,959	1,922	+36.17	+1.88%	6	21,823	0.3%	30.9	0.7%	NM	1.6x	EBL	34,361	1.0%	19.2	5.3x	0.8x
Jute	12,245	12,299	-54.20	-0.44%	3	2,695	0.0%	21.0	0.5%	NM	NM	BXPHARMA	34,261	1.0%	10.9	5.4x	0.7x
Ceramics	369	373	-4.20	-1.12%	5	16,563	0.2%	43.8	1.0%	NM	1.0x	PUBALIBANK	34,127	1.0%	55.4	3.6x	0.6x
Miscellaneous	4,288	4,297	-8.75	-0.20%	15	232,842	3.5%	149.9	3.6%	96.8x	1.9x	CITYBANK	30,713	0.9%	129.4	4.3x	0.8x
Corporate Bond**	15,445	15,479	-33.56	-0.22%	16	33,827	0.5%	3.5	0.1%	NM	NM	MJLBD	30,060	0.8%	26.1	9.2x	1.9x
Treasury Bond**	855	819	+35.16	+4.29%	234	3,113,568	46.6%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EPGL	16.5	+10.0%	12.5	NM	0.4x
1STPRIMFMF	23.1	+10.0%	43.8	NM	2.2x
IFADAUTOS	24.9	+9.7%	75.2	NM	0.7x
GBBPOWER	8.0	+9.6%	11.7	44.4x	0.4x
FAMILYTEX	2.6	+8.3%	3.9	NM	0.2x
UNIONBANK	4.2	+7.69%	2.0	11.4x	0.3x
PHOENIXFIN	4.2	+7.7%	8.2	NM	NM
HAKKANIPUL	59.9	+7.2%	69.8	NM	2.5x
DELTASPINN	7.5	+7.1%	27.2	NM	0.6x
SEMLIBLSF	6.2	+6.9%	0.1	NM	0.7x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	108,958	7.7%	8.6x	1.5x
ISLAMIBANK	74,730	5.3%	15.1x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.9x	3.1x
WALTONHIL	46,773	3.3%	11.2x	1.3x
BRACBANK	46,489	3.3%	8.2x	1.2x
GP	44,708	3.2%	12.8x	7.9x
RENATA	32,968	2.3%	19.5x	1.7x
BXPHARMA	23,409	1.7%	5.4x	0.7x
PUBALIBANK	22,905	1.6%	3.6x	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%	16.3x	2.6x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GP	337.0	+0.1%	188.0	12.8x	7.9x
CITYBANK	22.8	-1.3%	129.4	4.3x	0.8x
RUPALILIFE	99.7	+6.9%	107.6	NM	NM
BEACHHATCH	102.5	+3.2%	95.1	30.1x	6.8x
CENTRALPHL	14.1	+5.2%	91.9	NM	2.0x
KPPL	30.2	+4.1%	84.2	NM	NM
AGNISYSL	26.5	-2.2%	83.5	17.8x	1.5x
IFADAUTOS	24.9	+9.7%	75.2	NM	0.7x
KBPPWBIL	168.1	-2.7%	73.1	NM	14.1x
HAKKANIPUL	59.9	+7.2%	69.8	NM	2.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MEGHNACEM	47.2	-6.5%	1.1	NM	1.7x
TAKAFULINS	32.2	-5.8%	1.4	21.8x	2x
KAY&QUE	192.0	-5.7%	7.8	NM	2.0x
TALLUSPIN	6.5	-4.4%	6.0	NM	0.4x
ALLTEX	13.7	-4.2%	2.3	34.3x	0.7x
GHCL	22.2	-3.5%	5.5	NM	0.3x
DSSL	11.4	-3.4%	36.2	38.0x	0.6x
LRGLOBMF1	3.0	-3.2%	2.5	NM	0.3x
RENWICKJA	623.5	-3.2%	0.0	NM	NM
FASFIN	3.3	-2.9%	0.2	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MIDLANDBNK	27.1	26.5	7.0	1,240	32.92
BEACHHATCH	98.0	95.0	8.0	330	31.94
FINEFOODS	188.0	188.0	6.0	81	15.23
LOVELLO	85.0	81.5	5.0	147	12.34
EIL	54.0	54.0	2.0	200	10.80
AIL	88.0	88.0	1.0	81	7.16
CENTRALINS	40.0	40.0	1.0	100	4.00
CVOPRL	126.0	125.7	3.0	27	3.45
WALTONHIL	500.0	500.0	1.0	6	3.00
BERGERPBL	1,843.1	1,837.1	2.0	2	2.94

* 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
MIDLANDBNK	27.1	26.5	32.9	1,240	7
BEACHHATCH	98.0	95.0	31.9	330	8
FINEFOODS	188.0	188.0	15.2	81	6
LOVELLO	85.0	81.5	12.3	147	5
EIL	54.0	54.0	10.8	200	2
AIL	88.0	88.0	7.2	81	1
CENTRALINS	40.0	40.0	4.0	100	1
CVOPRL	126.0	125.7	3.4	27	3
WALTONHIL	500.0	500.0	3.0	6	1
BERGERPBL	1,843.1	1,837.1	2.9	2	2
UPGDCL	129.9	129.9	2.5	19	1
RELIANCE1	23.3	21.8	2.2	97	2
SILCOPHL	14.4	14.4	2.0	138	1
RUPALILIFE	101.1	101.1	1.9	19	1
SHARPIND	28.3	28.3	1.4	50	2
SONARGAON	39.8	39.8	1.2	30	1
BSC	88.0	88.0	1.1	13	1
BEXIMCO	99.1	99.1	1.1	11	2
CONTININS	22.0	22.0	0.8	35	1
POPULARLIF	43.6	43.6	0.7	16	1
KEYACOSMET	5.0	5.0	0.6	120	1
BBS	10.7	10.7	0.5	50	1
Total			140.8		53

Important DSE News
MTB

The company has informed that the Board of Directors of the company at its meeting held on February 02, 2025 approved the proposal for purchasing 15 floors (Ground floor to 14th floors) of a newly constructed 21-storied commercial building located at Plot No. 01, Road No. 138, Gulshan-1, Dhaka, for the Corporate Head Office of the Bank thereupon at a price of BDT 4,500,001,830/- (Bangladesh Taka Four Thousand Five Hundred Million One Thousand Eight Hundred Thirty only) excluding VAT & registration related costs, subject to approval of the regulatory authorities.

KAY&QUE

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., 03.02.2025 as per provision 1(e) of BSEC Directive No. BSEC/CMRRCD/2009-193/77, dated May 20, 2024 regarding non-disbursement of the approved dividend within the stipulated time frame.

JHRML

Mr. Md. Mohiuddin Ahmed, a Director of the company, has expressed intention to sell his entire holding of 100,000 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange PLC. within next 30 working days.

BDLAMPS

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Bangladesh Lamps PLC' instead of 'Bangladesh Lamps Limited' with effect from February 04, 2025. Other things (except name) will remain unchanged.

TECHNODRUG

The Company will be placed in 'A' category from existing 'N' category with effect from February 04, 2025 as the Company has reported disbursement of 12% Cash Dividend for the year ended June 30, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
POWERGRID		0.0%	0.0%	Record Date	6-Feb-25
RAKCERAMIC		0.0%	10.0%	Record Date	17-Feb-25
SINGERBD		0.0%	10.0%	Record Date	18-Feb-25
MARICO		0.0%	440.0%	Record Date	23-Feb-25

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