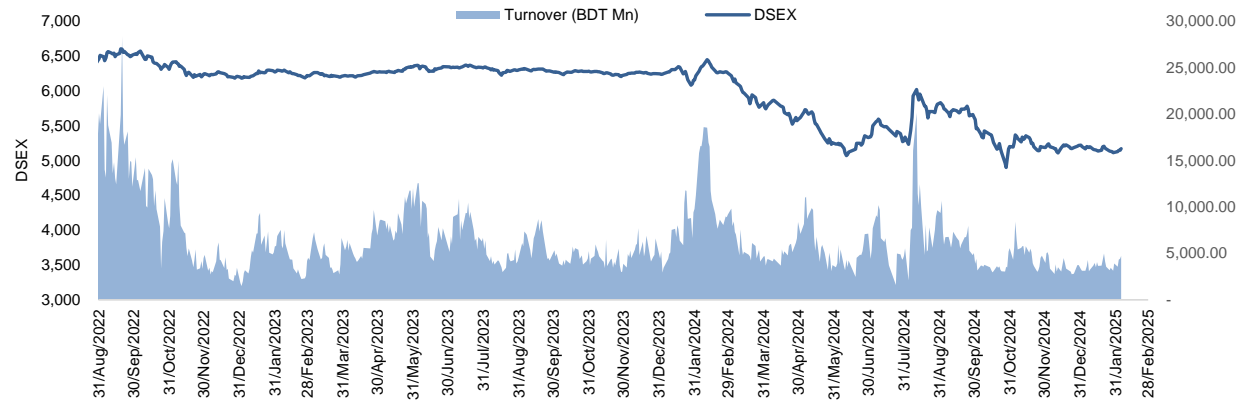


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.44%) gained 22.73 points and closed at 5,170.06. The blue-chip index DS30 (+0.19%), the Shariah-based index DSES (+0.70%), and the large-cap index CDSET (+0.11%) closed at 1,914.23, 1,147.23, and 1,049.81 points, respectively. Most of the large-cap sectors posted positive performance today. Food & Allied booked the highest gain of 0.88% followed by NBF1 (+0.59%), Fuel & Power (+0.53%), Pharmaceutical (+0.39%), Bank (+0.37%), Engineering (+0.19%), and Telecommunication (-0.11%), respectively. Block trades contributed 3.9% of the overall market turnover. Midland Bank Limited (+2.5%) was the most traded share with a turnover of BDT 124 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,170.06	5,147.34	+22.73	+0.44%	-0.9%
DS30	1,914.23	1,910.62	+3.61	+0.19%	-1.3%
DSES	1,147.23	1,139.28	+7.95	+0.70%	-1.9%
CDSET	1,049.81	1,048.61	+1.20	+0.11%	-1.5%

	Advanced	Declined	Unchanged	Total
All Category	207	129	65	401
A Category (Equity)	99	80	40	219
B Category (Equity)	57	22	8	87
N Category (Equity)	1	0	0	1
Z Category (Equity)	50	27	17	94
Mutual Funds	13	7	17	37
Corporate Bonds	0	0	2	2
Treasury Bonds	0	4	0	4

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,712,598	6,686,725	+0.4%
	Mn USD	55,021	54,809	
Turnover	Mn BDT	4,712	4,444	
	Mn USD	39	36	+6.0%
Volume	Mn Shares	211	172	+23.0%
No. of Trade		152,930	142,768	+7.1%

* Average Interbank Exchange Rate is BDT 122.00 as of Feb 05, 2025

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Figure: Sectorial Turnover (BDT Mn)

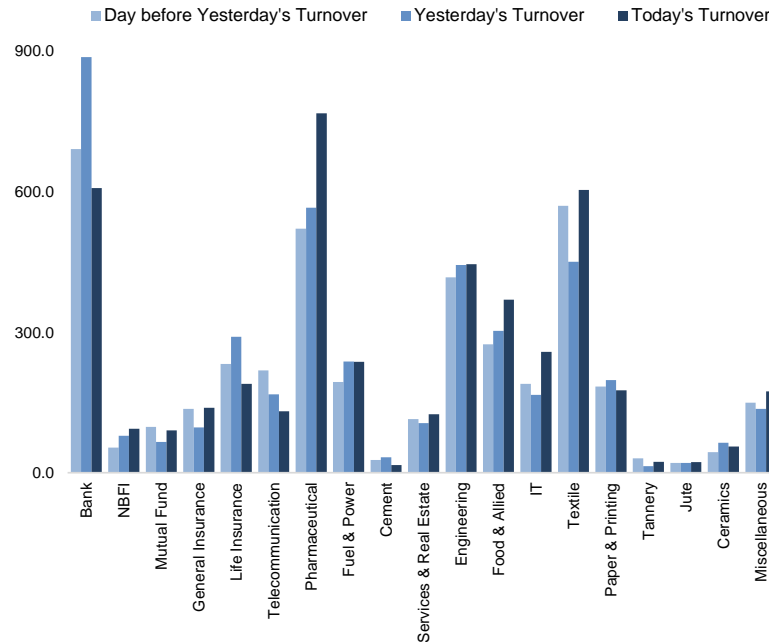
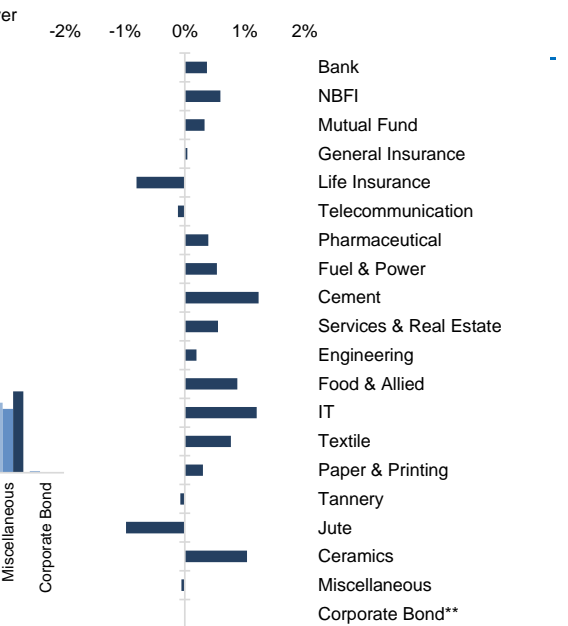


Figure: Sectorial Mcap Change



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	1,436	1,431	+5.31	+0.37%	36	679,550	10.1%	608.0	13.4%	8.8x	0.7x	GP	456,401	12.8%	106.0	12.6x	7.0x
NBFI	1,088	1,081	+6.42	+0.59%	23	103,655	1.5%	94.1	2.1%	NM	NM	SQURPHARMA	192,094	5.4%	53.8	8.6x	1.5x
Mutual Fund	568	566	+1.86	+0.33%	37	26,088	0.4%	90.4	2.0%	NM	0.5x	BATBC	190,782	5.3%	25.3	10.9x	3.1x
General Insurance	2,637	2,636	+1.10	+0.04%	43	75,280	1.1%	138.9	3.1%	13.6x	1.1x	WALTONHIL	147,890	4.1%	1.8	11.2x	1.3x
Life Insurance	1,771	1,785	-14.42	-0.81%	15	47,103	0.7%	189.8	4.2%	NM	NM	ROBI	147,710	4.1%	24.3	26.9x	2.3x
Telecommunication	5,348	5,354	-6.11	-0.11%	3	627,079	9.3%	131.5	2.9%	14.5x	4.3x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,860	2,849	+11.13	+0.39%	34	542,270	8.1%	767.4	16.9%	13.1x	1.5x	BRACBANK	90,432	2.5%	38.5	8.2x	1.2x
Fuel & Power	1,077	1,072	+5.73	+0.53%	23	285,381	4.3%	236.8	5.2%	24.9x	0.6x	BERGERPBL	84,102	2.4%	0.5	24.5x	5.8x
Cement	1,811	1,789	+22.06	+1.23%	7	86,298	1.3%	16.6	0.4%	16.6x	1.9x	MARICO	74,967	2.1%	80.1	13.4x	9.9x
Services & Real Estate	995	989	+5.50	+0.56%	9	54,716	0.8%	124.7	2.8%	19.4x	0.4x	UPGDCL	70,317	2.0%	2.7	6.6x	1.9x
Engineering	2,509	2,504	+4.84	+0.19%	42	283,052	4.2%	445.6	9.8%	12.8x	0.9x	RENATA	57,543	1.6%	6.4	19.5x	1.7x
Food & Allied	16,631	16,487	+144.43	+0.88%	21	304,309	4.5%	369.5	8.2%	16.5x	4.3x	LHB	56,675	1.6%	7.2	14.0x	2.8x
IT	1,990	1,966	+23.58	+1.20%	11	26,246	0.4%	258.0	5.7%	20.4x	1.7x	UNILEVERCL	49,223	1.4%	0.1	67.0x	20.9x
Textile	1,132	1,123	+8.66	+0.77%	58	117,879	1.8%	603.6	13.3%	70.8x	0.8x	ICB	46,572	1.3%	12.0	36.7x	1.1x
Paper & Printing	4,144	4,131	+12.55	+0.30%	6	18,722	0.3%	176.3	3.9%	NM	0.9x	DUTCHBANGL	46,314	1.3%	13.0	7.4x	0.9x
Tannery	1,953	1,954	-1.43	-0.07%	6	21,755	0.3%	23.1	0.5%	NM	1.6x	BXPHARMA	35,109	1.0%	24.6	5.5x	0.7x
Jute	12,183	12,304	-120.59	-0.98%	3	2,682	0.0%	22.4	0.5%	NM	NM	EBL	34,768	1.0%	7.9	5.3x	0.8x
Ceramics	380	376	+3.91	+1.04%	5	17,055	0.3%	56.0	1.2%	NM	1.1x	PUBALIBANK	34,011	1.0%	4.6	3.5x	0.6x
Miscellaneous	4,272	4,274	-2.42	-0.06%	15	231,980	3.5%	173.5	3.8%	96.5x	1.9x	CITYBANK	30,848	0.9%	69.6	4.3x	0.8x
Corporate Bond**	15,380	15,380	-	-	16	33,686	0.5%	0.1	0.0%	NM	NM	MJLBD	30,598	0.9%	43.1	9.3x	2.0x
Treasury Bond**	924	887	+37.50	+4.23%	234	3,127,315	46.6%	2.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GIB	4.4	+10.0%	19.8	8.4x	NM
EPL	19.9	+9.9%	21.6	NM	0.5x
ALIF	7.8	+9.9%	44.1	25.2x	0.5x
RDFOOD	22.6	+9.7%	41.5	25.1x	1.3x
BDTHAIFOOD	14.7	+9.7%	27.3	NM	1.0x
GENNEXT	3.4	+9.68%	11.0	NM	0.3x
ZAHEENSPIN	8.0	+9.6%	23.1	NM	2x
KTL	10.3	+9.6%	32.9	NM	0.7x
BBSCABLES	17.2	+9.6%	19.5	NM	0.5x
BBS	11.5	+9.5%	50.7	NM	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SICL	22.0	-6.0%	11.6	NM	1.2x
JUTESPINN	224.4	-5.8%	0.9	NM	NM
RENWICKJA	578.1	-5.5%	0.0	NM	NM
HAMI	108.8	-5.1%	2.6	NM	12.0x
SHARPIND	25.2	-3.8%	23.8	38.8x	2.4x
DELTASPINN	7.6	-3.8%	30.8	NM	0.6x
ASIATICLAB	39.3	-3.7%	73.1	16.7x	0.7x
PRIMETEX	14.4	-3.4%	0.7	NM	0.2x
ICBIBANK	2.9	-3.3%	0.1	NM	NM
ANLIMAYARN	23.3	-3.3%	4.0	NM	3.2x

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%	15.0x	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%	12.6x	7.0x
RENATA	32,968	2.3%	19.5x	1.7x
BXPHARMA	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%	14.0x	2.8x
OLYMPIC	20,496	1.5%	16.2x	2.6x
ALARABANK	18,282	1.3%	12.2x	0.9x
BEACONPHAR	17,838	1.3%	49.9x	4.4x
PRIMEBANK	16,142	1.1%	4.5x	0.8x
ROBI	14,876	1.1%	26.9x	2.3x
UTTARABANK	13,699	1.0%	8.4x	0.8x
NBL	13,055	0.9%	NM	2.5x
BSRMLTD	12,852	0.9%	5.4x	0.5x

* 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
MIDLANDBNK	28.9	+2.5%	123.7	16.7x	2.0x
ORIONINFU	376.0	+4.3%	123.3	NM	24.5x
AGNISYSL	27.6	+3.0%	120.1	18.5x	1.6x
BEACHHATCH	103.9	+1.3%	106.7	30.5x	6.9x
GP	338.0	-0.2%	106.0	12.6x	7.0x
KOHINOOR	561.4	+0.4%	94.2	33.9x	9.3x
CENTRALPHL	14.9	-1.3%	88.6	NM	2.2x
MARICO	2,379.9	+1.7%	80.1	13.4x	9.9x
RUPALILIFE	99.8	-2.9%	78.9	NM	NM
KPPL	32.7	-1.5%	76.4	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	105.0	93.0	23.0	717	70.91
MIDLANDBNK	28.1	28.1	11.0	1,380	38.77
RELIANCE1	21.6	21.0	8.0	1,121	23.68
LOVELLO	90.0	80.0	5.0	105	8.64
KOHINOOR	568.0	529.9	6.0	15	8.28
AIL	97.0	97.0	1.0	85	8.21
MONNOFABR	18.1	18.1	1.0	228	4.13
CLICL	40.8	40.8	3.0	50	2.04
BEXIMCO	99.1	99.1	2.0	16	1.54
MARICO	2,450.0	2,304.3	3.0	1	1.51

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BEACHHATCH	105.0	93.0	70.9	717	23
MIDLANDBNK	28.1	28.1	38.8	1,380	11
RELIANCE1	21.6	21.0	23.7	1,121	8
LOVELLO	90.0	80.0	8.6	105	5
KOHINOOR	568.0	529.9	8.3	15	6
AIL	97.0	97.0	8.2	85	1
MONNOFABR	18.1	18.1	4.1	228	1
CLICL	40.8	40.8	2.0	50	3
BEXIMCO	99.1	99.1	1.5	16	2
MARICO	2,450.0	2,304.3	1.5	1	3
EIL	57.0	57.0	1.5	26	1
RUPALILIFE	97.0	97.0	1.3	13	1
BDTHAI	13.7	13.7	1.2	90	1
ACFL	18.4	18.4	1.0	55	1
REPUBLIC	28.3	28.3	1.0	35	1
KBPPWBIL	151.0	151.0	1.0	7	1
CVOPRL	120.5	120.5	1.0	8	1
ORIONINFU	390.0	390.0	0.9	2	1
BBSCABLES	17.2	17.2	0.9	50	1
SUNLIFEINS	74.0	74.0	0.8	11	1
AGNISYSL	24.7	24.7	0.7	30	1
DGIC	20.3	20.3	0.7	36	1
Total			183.1		81

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
GP		0.0%	170.0%	Record Date	26-Feb-25

Important DSE News

ORIONPHARM

The Company has been placed in 'Z' category from existing 'A' category with effect from today i.e., 05.02.2025 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.

BBS

The Company has been placed in 'B' category from existing 'Z' category with effect from today i.e., February 05, 2025 as the Company has reported disbursement of 0.5% Cash Dividend for the year ended June 30, 2024.

SICL

The Company has been placed in 'Z' category from existing 'N' category with effect from today i.e., 05.02.2025 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.

NAVANACNG

The Company has been placed in 'Z' category from existing 'A' category with effect from today i.e., 05.02.2025 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.

AFTABAUTO

The Company has been placed in 'Z' category from existing 'A' category with effect from today i.e., 05.02.2025 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.

ASIATICLAB

The Company has been placed in 'A' category from existing 'Z' category with effect from today i.e., February 05, 2025 as the Company has reported disbursement of 10% Cash Dividend for the year ended June 30, 2024.

NTC

The company has informed as per decision of the meeting of the Board of Directors, Mr. H. S. M. Ziaul Ahsan has been appointed as Managing Director and Mr. A. K. Azad Chowdhury has been appointed as Company Secretary with effect from February 03, 2025.

BEXIMCO

The company has attached a copy of the Layoff Notice dated 04.02.2025 issued by the Management of the company that declared Layoff of the Employees and Workers of Yarn Unit-2, Textile, Denim and Knitting Divisions located at Beximco Industrial Park, Saravo, Kashimpur, Gazipur of Bangladesh Export Import Company Ltd. The Company's other Divisions including Yarn Unit-I located at Taki, Tarabo, Rupganj will remain operational as usual.

FEKDIL

The Board of Directors of the company in its Board Meeting has approved a lease agreement for 318 Decimals of land at Kaliakoir, Gazipur for 11 months at a monthly rent Tk. 2,00,000.00 (Taka Two Lac) only with effect from 03 February 2025. The lease property will be used expansion of garments business including manufacturing, printing, dyeing and knitting of the Company.

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