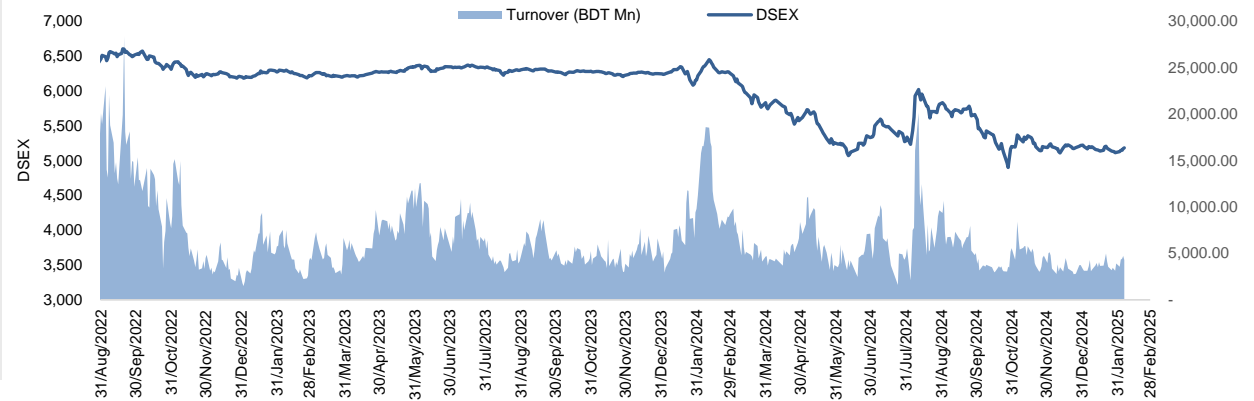


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.18%) gained 9.11 points and closed at 5,179.18. The blue-chip index DS30 (-0.07%), the Shariah-based index DSES (+0.05%), and the large-cap index CDSET (-0.11%) closed at 1,912.90, 1,147.80, and 1,048.61 points, respectively. Large-cap sectors posted mixed performance today. NBF1 booked the highest gain of 2.16%, followed by Fuel & Power (+1.20%), Telecommunication (+0.38%), Bank (-0.07%), Engineering (-0.09%), Pharmaceutical (-0.23%), and Food & Allied (-0.71%), respectively. Block trades contributed 4.2% of the overall market turnover. Eastern Housing Limited (+9.9%) was the most traded share with a turnover of BDT 133 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,179.18	5,170.06	+9.11	+0.18%	-0.7%
DS30	1,912.90	1,914.23	-1.33	-0.07%	-1.4%
DSES	1,147.80	1,147.23	+0.56	+0.05%	-1.8%
CDSET	1,048.61	1,049.81	-1.20	-0.11%	-1.6%

	Advanced	Declined	Unchanged	Total
All Category	195	147	53	395
A Category (Equity)	98	80	38	216
B Category (Equity)	46	36	4	86
N Category (Equity)	0	1	0	1
Z Category (Equity)	51	30	11	92
Mutual Funds	12	7	18	37
Corporate Bonds	1	0	1	2
Treasury Bonds	0	1	0	1

	Today	Last Day	Daily %Δ
Mcap	Mn BDT 6,739,305	6,712,598	+0.4%
	Mn USD 55,240	55,021	
Turnover	Mn BDT 4,297	4,712	-8.8%
	Mn USD 35	39	
Volume	Mn Shares 194	211	-8.0%
No. of Trade	147,204	152,930	-3.7%

* Average Interbank Exchange Rate is BDT 122.00 as of Feb 06, 2025

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Figure: Sectorial Turnover (BDT Mn)

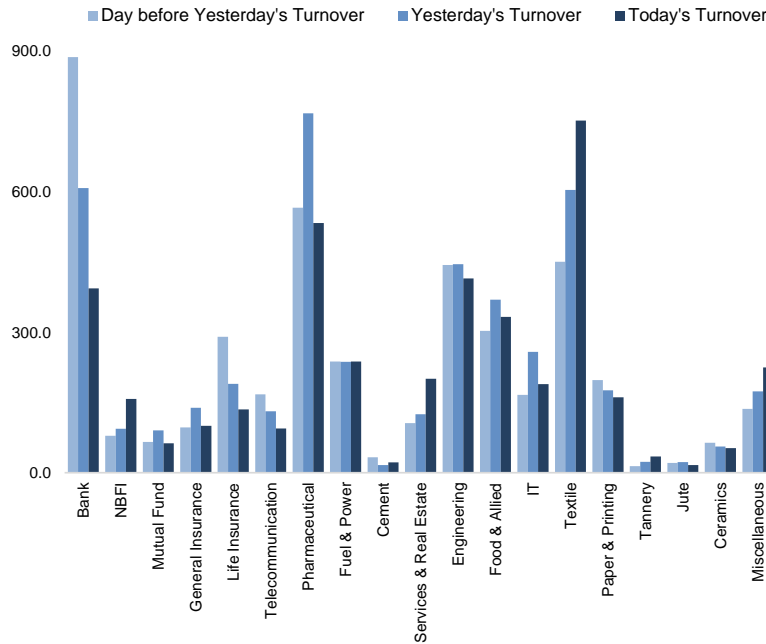
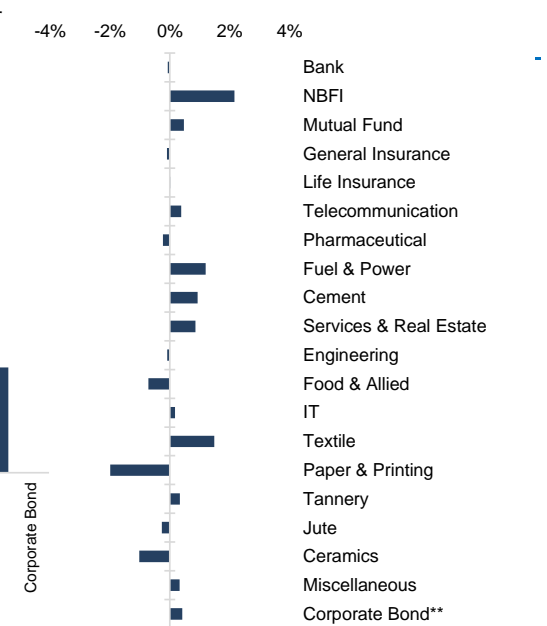


Figure: Sectorial Mcap Change



Market PE 15.2x
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	1,435	1,436	-1.01	-0.07%	36	679,072	10.1%	393.8	9.6%	8.8x	0.7x	GP	456,131	12.8%	43.1	12.6x	7.0x
NBFI	1,111	1,088	+23.48	+2.16%	23	105,893	1.6%	157.4	3.8%	NM	NM	SQURPHARMA	191,473	5.4%	39.3	8.6x	1.5x
Mutual Fund	570	568	+2.65	+0.47%	37	26,210	0.4%	62.8	1.5%	NM	0.5x	BATBC	189,054	5.3%	58.4	10.8x	3.3x
General Insurance	2,634	2,637	-2.56	-0.10%	43	75,207	1.1%	100.1	2.4%	13.6x	1.1x	ROBI	150,329	4.2%	48.9	27.3x	2.3x
Life Insurance	1,771	1,771	+0.05	+0.00%	15	47,104	0.7%	135.0	3.3%	NM	NM	WALTONHIL	146,769	4.1%	4.7	11.1x	1.3x
Telecommunication	5,368	5,348	+20.19	+0.38%	3	629,447	9.3%	94.6	2.3%	14.6x	4.3x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,854	2,860	-6.50	-0.23%	34	541,038	8.0%	533.0	12.9%	13.1x	1.5x	BRACBANK	90,432	2.5%	31.2	8.2x	1.2x
Fuel & Power	1,090	1,077	+12.88	+1.20%	23	288,794	4.3%	237.3	5.8%	19.5x	0.6x	BERGERPBL	83,754	2.3%	0.6	24.4x	5.8x
Cement	1,828	1,811	+16.82	+0.93%	7	87,100	1.3%	22.1	0.5%	16.8x	1.9x	MARICO	75,461	2.1%	12.7	13.5x	9.9x
Services & Real Estate	1,003	995	+8.50	+0.85%	9	55,183	0.8%	200.6	4.9%	19.6x	0.4x	ISLAMIBANK	71,001	2.0%	13.2	15.2x	1.0x
Engineering	2,507	2,509	-2.24	-0.09%	42	282,799	4.2%	414.8	10.1%	12.8x	0.9x	RENATA	57,497	1.6%	11.3	19.4x	1.7x
Food & Allied	16,513	16,631	-118.80	-0.71%	21	302,136	4.5%	332.6	8.1%	16.4x	4.5x	LHB	57,140	1.6%	6.9	14.1x	2.8x
IT	1,993	1,990	+3.47	+0.17%	11	26,291	0.4%	189.0	4.6%	20.4x	1.7x	UNILEVERCL	48,889	1.4%	0.0	66.5x	20.8x
Textile	1,149	1,132	+16.81	+1.49%	58	119,630	1.8%	752.3	18.3%	71.9x	0.8x	ICB	46,745	1.3%	16.8	36.9x	1.1x
Paper & Printing	4,061	4,144	-82.62	-1.99%	6	18,348	0.3%	161.0	3.9%	NM	0.8x	DUTCHBANGL	46,314	1.3%	8.6	7.4x	0.9x
Tannery	1,959	1,953	+6.64	+0.34%	6	21,829	0.3%	34.7	0.8%	NM	1.6x	EBL	34,904	1.0%	9.9	5.3x	0.8x
Jute	12,150	12,183	-32.52	-0.27%	3	2,675	0.0%	16.6	0.4%	NM	NM	BXPHARMA	34,395	1.0%	9.8	5.4x	0.7x
Ceramics	376	380	-3.87	-1.02%	5	16,881	0.3%	52.7	1.3%	NM	1.0x	PUBALIBANK	33,895	0.9%	4.4	3.5x	0.6x
Miscellaneous	4,286	4,272	+13.87	+0.32%	15	232,733	3.5%	225.0	5.5%	96.6x	1.9x	MJLBD	31,358	0.9%	36.8	9.6x	2.0x
Corporate Bond**	15,445	15,380	+64.60	+0.42%	16	33,827	0.5%	1.0	0.0%	NM	NM	CITYBANK	30,848	0.9%	55.0	4.3x	0.8x
Treasury Bond**	964	924	+40.40	+4.37%	234	3,146,603	46.7%	0.5	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
METROSPIN	13.2	+10.0%	2.3	NM	2.6x
EHL	74.3	+9.9%	133.4	10.7x	0.9x
ESQUIRENIT	22.4	+9.8%	18.8	13.2x	0.3x
BDFINANCE	12.4	+9.7%	19.2	NM	1.2x
FAREASTFIN	3.4	+9.7%	2.0	NM	NM
FIRSTFIN	3.4	+9.68%	0.7	NM	NM
EPGL	21.8	+9.5%	20.7	NM	1x
NEWLINE	9.4	+9.3%	8.6	NM	0.4x
HFL	10.6	+9.3%	13.8	NM	0.3x
HAMI	118.7	+9.1%	4.1	NM	13.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KPPL	29.6	-9.5%	81.5	NM	NM
ZAHINTEX	5.0	-5.7%	0.5	NM	1x
DELTASPINN	7.2	-5.3%	13.1	NM	0.6x
RENWICKJA	550.0	-4.9%	0.0	NM	NM
CENTRALPHL	14.2	-4.7%	71.9	NM	2.1x
VAMLRBBF	4.3	-4.4%	0.8	NM	0.4x
HAKKANIPUL	57.5	-4.3%	38.8	NM	2.4x
EIL	51.1	-4.1%	12.5	35.7x	2.7x
ZAHEENSPIN	7.7	-3.8%	16.8	NM	2.0x
PENINSULA	10.6	-3.6%	1.5	NM	0.4x

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%	15.2x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.8x	3.3x
WALTONHIL	46,773	3.3%	11.1x	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%	19.4x	1.7x
BXPHARMA	23,409	1.7%	5.4x	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%	16.2x	2.6x
ALARABANK	18,282	1.3%	12.0x	0.9x
BEACONPHAR	17,838	1.3%	49.8x	4.4x
PRIMEBANK	16,142	1.1%	4.5x	0.8x
ROBI	14,876	1.1%	27.3x	2.3x
UTTARABANK	13,699	1.0%	8.2x	0.8x
NBL	13,055	0.9%	NM	2.5x
BSRMLTD	12,852	0.9%	5.6x	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
EHL	74.3	+9.9%	133.4	10.7x	0.9x
BEACHHATCH	103.7	-0.2%	100.1	30.4x	6.8x
ORIONINFU	367.8	-2.2%	91.1	NM	24.0x
KBPPWBIL	169.8	+2.0%	88.2	NM	14.3x
KPPL	29.6	-9.5%	81.5	NM	NM
BSC	87.1	+4.6%	76.5	4.6x	0.8x
CENTRALPHL	14.2	-4.7%	71.9	NM	2.1x
SIMTEX	19.5	+6.0%	65.3	18.8x	0.9x
AGNISYSL	27.3	-1.1%	59.6	18.3x	1.6x
QUEENSOUTH	14.2	+4.4%	59.2	38.4x	0.9x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	105.0	98.7	8.0	436	43.41
MARICO	2,490.0	2,395.5	5.0	12	28.93
MIDLANDBNK	28.1	28.1	1.0	1,000	28.10
BXPHARMA	86.5	86.5	2.0	200	17.30
KBPPWBIL	150.0	149.8	2.0	70	10.51
TECHNODRUG	37.7	34.4	5.0	245	8.82
MJLBD	96.5	96.5	2.0	75	7.24
RUPALILIFE	109.5	91.0	3.0	32	3.28
REPUBLIC	29.0	29.0	2.0	105	3.05
ACFL	19.0	19.0	1.0	157	2.99

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BEACHHATCH	105.0	98.7	43.4	436	8
MARICO	2,490.0	2,395.5	28.9	12	5
MIDLANDBNK	28.1	28.1	28.1	1,000	1
BXPHERMA	86.5	86.5	17.3	200	2
KBPPWBIL	150.0	149.8	10.5	70	2
TECHNODRUG	37.7	34.4	8.8	245	5
MJLBD	96.5	96.5	7.2	75	2
RUPALILIFE	109.5	91.0	3.3	32	3
REPUBLIC	29.0	29.0	3.0	105	2
ACFL	19.0	19.0	3.0	157	1
GP	353.0	353.0	2.5	7	1
GPHISPAT	23.2	23.2	2.3	100	1
LHB	53.6	53.6	2.1	40	1
GQBALLPEN	147.0	147.0	1.9	13	1
AIL	90.0	90.0	1.8	20	1
LOVELLO	87.5	87.5	1.8	21	1
JMISMDL	132.5	132.5	1.8	14	1
ZEALBANGLA	95.5	94.9	1.7	18	2
BEACONPHAR	130.0	129.0	1.0	8	2
BRACBANK	51.4	51.3	1.0	20	2
AL-HAJTEX	114.0	114.0	1.0	9	1
BEXIMCO	99.1	99.1	1.0	10	1
Total			179.7		55

Important DSE News

BATBC

The Board of Directors has declared Final Cash Dividend 150% i.e. BDT. 15 per share (i.e. Total Dividend 300% i.e. BDT 30 per share including Interim Cash Dividend 150% i.e. 15 per share which was already paid in December 2024). Record Date: 26.02.2025. Date & Time of AGM: 25.03.2025 at 10:30 AM. The company has also reported EPS of Tk. 32.42, NAV per share of Tk. 106.88 and NOCFPS of Tk. 32.07 for the year ended December 31, 2024 as against Tk. 33.11, Tk. 99.33 and Tk. 18.90 respectively for the year ended December 31, 2023.

SIPLC

The Board of Directors has recommended 15% cash dividend for the year ended December 31, 2024. The Company has reported EPS of Tk. 4.29, NAV per share of Tk. 25.16 and NOCFPS of Tk. 7.23 for the year ended December 31, 2024 as against Tk. 3.42, Tk. 22.43 and Tk. 5.82 respectively for the year ended December 31, 2023. Date of AGM: 24.03.2025, Time: 11:30 AM. Record Date: 27.02.2025.

The company has informed that the Board has decided to purchase 60.22 decimal land at Rugganj, Narayanganj for an amount of Tk. 9.03 crore excluding registration & others fees, subject to the approval from IDRA.

ARAMIT

(Q2 Un-audited): EPS was Tk. 0.25 for October-December 2024 as against Tk. (0.57) for October-December 2023; EPS was Tk. 0.68 for July-December 2024 as against Tk. (0.95) for July-December 2023. NOCFPS was Tk. 1.37 for July-December 2024 as against Tk. (0.22) for July-December 2023. NAV per share was Tk. 128.23 as on December 31, 2024 and Tk. 136.10 as on June 30, 2024.

POWERGRID

(Q2 Un-audited): Basic EPS was Tk. 4.36 for October-December 2024 as against Basic EPS Tk. 1.15 and Diluted EPS Tk. 0.89 for October-December 2023; Basic EPS was Tk. 1.55 for July-December 2024 as against Basic EPS Tk. (0.27) and Diluted EPS Tk. (0.21) for July-December 2023. NOCFPS was Tk. 11.70 for July-December 2024 as against Tk. 10.15 (restated) for July-December 2023. NAV per share was Tk. 141.66 as on December 31, 2024 and Tk. 132.61 as on 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
GP		0.0%	170.0%	Record Date	26-Feb-25
BATBC		0.0%	150.0%	Record Date	26-Feb-25
SIPLC		0.0%	15.0%	Record Date	27-Feb-25

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