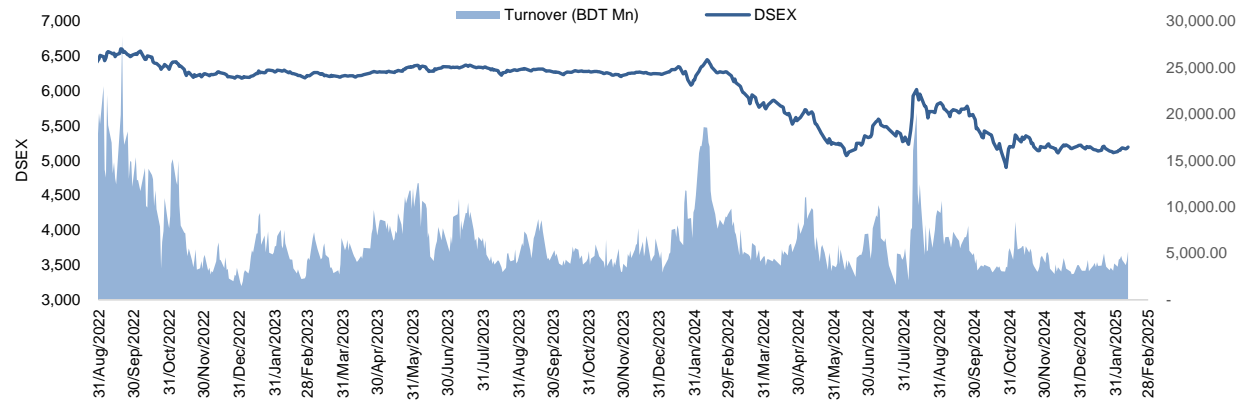


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.34%) gained 17.77 points and closed at 5,192.05. The blue-chip index DS30 (+0.10%), the Shariah-based index DSES (+0.30%), and the large-cap index CDSET (+0.12%) closed at 1,914.07, 1,152.70, and 1,049.96 points, respectively. Most of the large-cap sectors posted positive performance today. Fuel & Power booked the highest gain of 1.23% followed by Engineering (+0.79%), NBF1 (+0.52%), Bank (+0.22%), Pharmaceutical (+0.05%), Telecommunication (-0.02%), and Food & Allied (-0.39%), respectively. Block trades contributed 7.2% of the overall market turnover. Pubali Bank Ltd. (+0.3%) was the most traded share with a turnover of BDT 196 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,192.05	5,174.28	+17.77	+0.34%	-0.5%
DS30	1,914.07	1,912.23	+1.84	+0.10%	-1.3%
DSES	1,152.70	1,149.20	+3.50	+0.30%	-1.4%
CDSET	1,049.96	1,048.66	+1.30	+0.12%	-1.5%

	Advanced	Declined	Unchanged	Total
All Category	215	119	65	399
A Category (Equity)	120	61	38	219
B Category (Equity)	47	24	11	82
N Category (Equity)	0	0	0	0
Z Category (Equity)	48	34	16	98
Mutual Funds	10	8	19	37
Corporate Bonds	0	2	0	2
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,840,427	6,825,573	+0.2%
Mn USD	56,069	55,947	
Turnover			
Mn BDT	5,196	4,207	+23.5%
Mn USD	43	34	
Volume			
Mn Shares	196	163	+20.6%
No. of Trade	159,152	142,552	+11.6%

* Average Interbank Exchange Rate is BDT 122.00 as of Feb 11, 2025

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Figure: Sectorial Turnover (BDT Mn)

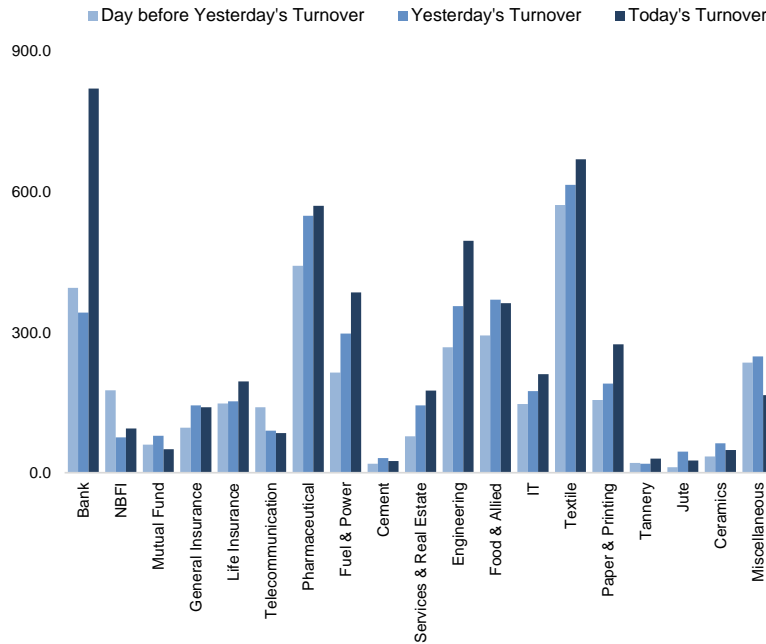
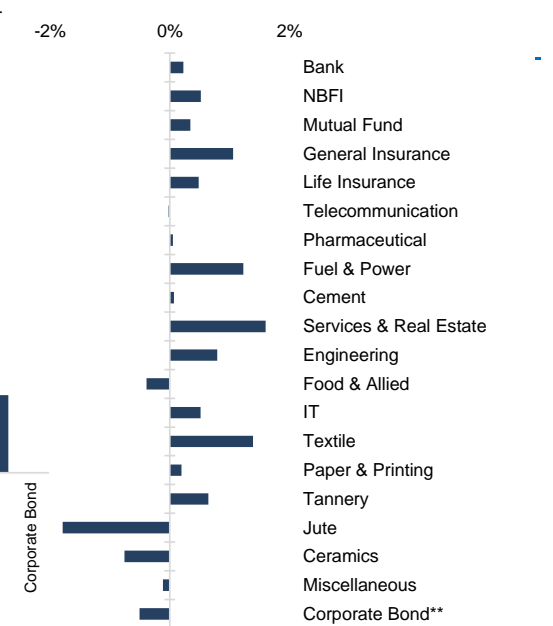


Figure: Sectorial Mcap Change



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	1,431	1,427	+3.21	+0.22%	36	676,882	10.0%	820.5	17.0%	8.7x	0.7x	GP	455,186	12.7%	22.6	12.5x	7.0x
NBFI	1,100	1,094	+5.68	+0.52%	23	104,829	1.5%	94.4	2.0%	NM	NM	SQURPHARMA	190,587	5.3%	55.8	8.5x	1.5x
Mutual Fund	565	563	+1.93	+0.34%	37	25,969	0.4%	50.5	1.0%	NM	0.5x	BATBC	187,326	5.2%	48.5	10.7x	3.2x
General Insurance	2,601	2,574	+27.18	+1.06%	43	74,259	1.1%	140.0	2.9%	13.1x	1.1x	ROBI	150,329	4.2%	54.1	27.3x	2.3x
Life Insurance	1,757	1,749	+8.46	+0.48%	15	46,737	0.7%	194.8	4.0%	NM	NM	WALTONHIL	148,586	4.1%	3.8	11.3x	1.3x
Telecommunication	5,360	5,361	-0.97	-0.02%	3	628,483	9.2%	84.5	1.8%	14.6x	4.3x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,852	2,851	+1.42	+0.05%	34	540,759	8.0%	570.3	11.8%	13.1x	1.5x	BRACBANK	91,140	2.5%	44.2	8.2x	1.2x
Fuel & Power	1,124	1,111	+13.65	+1.23%	23	297,842	4.4%	384.8	8.0%	19.8x	0.6x	BERGERPBL	83,865	2.3%	0.0	24.4x	5.8x
Cement	1,832	1,831	+1.31	+0.07%	7	87,309	1.3%	24.8	0.5%	16.8x	1.9x	MARICO	74,498	2.1%	4.7	13.3x	9.8x
Services & Real Estate	1,021	1,005	+16.07	+1.60%	9	56,143	0.8%	175.4	3.6%	19.9x	0.4x	UPGDCL	70,897	2.0%	8.9	6.7x	1.9x
Engineering	2,531	2,511	+19.91	+0.79%	42	285,472	4.2%	495.4	10.3%	13.0x	0.9x	RENATA	57,624	1.6%	9.7	19.5x	1.7x
Food & Allied	16,470	16,534	-64.24	-0.39%	21	301,353	4.4%	362.0	7.5%	16.4x	4.5x	LHB	57,140	1.6%	9.8	14.1x	2.8x
IT	2,017	2,007	+10.35	+0.52%	11	26,607	0.4%	210.3	4.4%	20.6x	1.7x	UNILEVERCL	49,227	1.4%	0.1	67.0x	20.9x
Textile	1,156	1,140	+15.82	+1.39%	58	120,358	1.8%	669.6	13.9%	72.3x	0.8x	ICB	45,705	1.3%	6.6	36.1x	1.0x
Paper & Printing	4,336	4,328	+8.53	+0.20%	6	19,590	0.3%	274.0	5.7%	NM	0.9x	DUTCHBANGL	45,699	1.3%	90.5	7.3x	0.9x
Tannery	1,968	1,956	+12.60	+0.64%	6	21,932	0.3%	30.4	0.6%	NM	1.6x	POWERGRID	35,090	1.0%	51.5	NM	0.3x
Jute	12,361	12,586	-225.48	-1.79%	3	2,721	0.0%	26.2	0.5%	NM	NM	EBL	34,904	1.0%	6.3	5.3x	0.8x
Ceramics	381	383	-2.91	-0.76%	5	17,071	0.3%	48.7	1.0%	NM	1.1x	BXPHARMA	34,172	1.0%	7.2	5.3x	0.7x
Miscellaneous	4,296	4,301	-4.98	-0.12%	15	233,267	3.4%	165.5	3.4%	96.8x	1.9x	PUBALIBANK	34,011	0.9%	196.2	3.5x	0.6x
Corporate Bond**	15,397	15,475	-78.30	-0.51%	16	33,722	0.5%	0.2	0.0%	NM	NM	MJLBD	30,820	0.9%	31.4	9.4x	2.0x
Treasury Bond**	1,093	1,052	+41.12	+3.91%	234	3,193,159	47.0%	0.9	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
MLDYEING	11.0	+10.0%	15.5	47.8x	0.8x	SQURPHARMA	108,958	7.7%	8.5x	1.5x	PUBALIBANK	29.4	+0.3%	196.2	3.5x	0.6x
SUMITPOWER	16.5	+10.0%	16.0	23.2x	0.4x	ISLAMIBANK	74,730	5.3%	15.0x	1.0x	SONALIPAPR	154.3	+2.3%	122.8	27.2x	0.9x
AL-HAJTEX	145.6	+10.0%	70.0	NM	17.2x	BEXIMCO	69,463	4.9%	NM	1.3x	ORIONINFU	368.3	-1.3%	94.3	NM	24.0x
MIRAKHTER	33.7	+9.8%	32.1	13.8x	0.7x	BATBC	50,233	3.6%	10.7x	3.2x	TRUSTBANK	22.2	+0.9%	93.6	4.8x	0.8x
TOSRIFA	19.6	+9.5%	19.0	37.0x	0.6x	WALTONHIL	46,773	3.3%	11.3x	1.3x	CITYBANK	22.7	-	93.1	4.3x	0.8x
NEWLIN	10.7	+9.18%	36.2	NM	0.4x	BRACBANK	46,489	3.3%	8.2x	1.2x	MIDLANDBNK	28.4	-	91.4	16.4x	2.0x
PRIMEFIN	4.9	+8.9%	1.6	NM	1x	GP	44,708	3.2%	12.5x	7.0x	DUTCHBANGL	52.0	-0.4%	90.5	7.3x	0.9x
NURANI	4.0	+8.1%	2.4	NM	0.4x	RENATA	32,968	2.3%	19.5x	1.7x	BEACHHATCH	109.6	+0.7%	85.7	32.1x	7.2x
RUNNERAUTO	29.5	+7.7%	40.2	22.5x	0.5x	BXPHARMA	23,409	1.7%	5.3x	0.7x	BESTHLDNG	18.4	+4.0%	79.4	22.0x	0.3x
PADMALIFE	18.0	+7.1%	0.6	NM	NM	PUBALIBANK	22,905	1.6%	3.5x	0.6x	AL-HAJTEX	145.6	+10.0%	70.0	NM	17.2x

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)
PAPERPROC	92.9	-4.1%	25.7	27.8x	1.3x	OLYMPIC	20,496	1.5%	16.3x	2.6x	ACI	155.8	155.8	9.0	1,605	250.03
RENWICKJA	543.5	-4.1%	0.0	NM	NM	ALARABANK	18,282	1.3%	12.0x	0.9x	BXPHARMA	76.5	76.5	1.0	650	49.73
CENTRALPHL	14.1	-4.1%	46.0	NM	2.0x	BEACONPHAR	17,838	1.3%	50.6x	4.4x	BEACHHATCH	107.0	99.0	7.0	141	14.85
ZEALBANGLA	85.0	-3.7%	0.2	NM	NM	PRIMEBANK	16,142	1.1%	4.5x	0.8x	LHB	49.0	49.0	2.0	169	8.28
PLFSL	2.6	-3.7%	0.9	NM	NM	ROBI	14,876	1.1%	27.3x	2.3x	RELIANCE1	21.0	20.5	3.0	375	7.73
MEGHNACEM	48.1	-3.6%	0.5	NM	1.7x	UTTARABANK	13,699	1.0%	8.3x	0.8x	BRACBANK	51.5	51.2	2.0	150	7.70
GHCL	22.0	-3.5%	2.5	NM	0.3x	NBL	13,055	0.9%	NM	2.5x	EIL	45.0	42.0	2.0	150	6.60
ALLTEX	13.8	-3.5%	1.2	34.5x	0.7x	BSRMLTD	12,852	0.9%	5.5x	0.5x	AL-HAJTEX	142.0	122.2	4.0	24	3.17
HAMI	106.9	-3.3%	1.4	NM	11.7x						ICBSONALI1	6.9	6.9	1.0	415	2.87
BDTHAI	15.1	-3.2%	36.7	NM	0.5x						NAVANACNG	23.3	23.3	1.0	100	2.33

* 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
ACI	155.8	155.8	250.0	1,605	9
BXPHARMA	76.5	76.5	49.7	650	1
BEACHHATCH	107.0	99.0	14.9	141	7
LHB	49.0	49.0	8.3	169	2
RELIANCE1	21.0	20.5	7.7	375	3
BRACBANK	51.5	51.2	7.7	150	2
EIL	45.0	42.0	6.6	150	2
AL-HAJTEX	142.0	122.2	3.2	24	4
ICBSONALI1	6.9	6.9	2.9	415	1
NAVANACNG	23.3	23.3	2.3	100	1
POPULARLIF	44.0	44.0	2.2	50	1
BEXIMCO	99.1	99.1	1.8	18	3
BSC	95.2	95.2	1.7	18	1
ACFL	18.8	18.8	1.4	76	1
SUNLIFEINS	73.8	73.8	1.3	18	1
RELIANCINS	60.9	60.9	1.2	20	1
QUEENSOUTH	14.6	14.6	1.2	80	1
SONARGAON	38.5	38.5	1.2	30	1
SBACBANK	8.5	8.5	0.9	100	1
PADMAOIL	183.3	183.3	0.8	4	1
BDTHAI	14.2	14.2	0.7	50	1
1STPRIMFMF	23.0	23.0	0.7	30	1
Total			372.3		53

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
RAKCERAMIC		0.0%	10.0%	Record Date	17-Feb-25
SINGERBD		0.0%	10.0%	Record Date	17-Feb-25
MARICO		0.0%	10.0%	Record Date	18-Feb-25
GP		0.0%	440.0%	Record Date	23-Feb-25
BATBC		0.0%	170.0%	Record Date	26-Feb-25
SIPLC		0.0%	150.0%	Record Date	26-Feb-25
CITYGENINS		0.0%	15.0%	Record Date	27-Feb-25
CRYSTALINS		0.0%	10.0%	Record Date	27-Feb-25
RELIANCINS		0.0%	12.0%	Record Date	2-Mar-25

Important DSE News
RELIANCINS

The Board of Directors of the company has recommended 30% Cash Dividend for the year ended December 31, 2024. The Company has reported EPS of Tk. 9.12, NAV per share of Tk. 69.59 and NOCFPS of Tk. 1.66 for the year ended December 31, 2024 as against Tk. 6.56, Tk. 66.85 and Tk. 4.84 respectively for the year ended December 31, 2023. Date of AGM: 25.03.2025. Record Date: 03.03.2025. Venue of AGM: Virtually using Digital Platform. Time: 11:00 AM.

UNIONINS

The Company has been placed in 'A' category from existing 'Z' category with effect from today i.e., 11.02.2025 as the Company has reported disbursement of 10% Cash Dividend for the year ended December 31, 2023.

BEACHHATCH

The Company has been placed in 'A' category from existing 'B' category with effect from today i.e., 11.02.2025 as the Company has reported disbursement of 10% Cash Dividend for the year ended June 30, 2024.

SHEPHERD

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., 11.02.2025 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. The Company will be placed in 'B' category from existing 'Z' category with effect from February 12, 2025 as the Company has reported disbursement of 1% Cash Dividend for the year ended June 30, 2024.

SAIFPOWER

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., 11.02.2025 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.

GENEXIL

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., 11.02.2025 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.

BDCOM

The company has informed that Mr. Md. Jamilur Rahman, FCS, Assistant General Manager has been given promotion of Company Secretary of the company with effect from 20 February, 2025.

HAKKANIPUL

Mr. Mohammed Golam Morshed, one of the Sponsor Directors of the Company, has reported his intention to sell 1,00,000 shares out of his holding of 14,66,666 shares of the Company at prevailing market price (In the Block Market) through Chittagong Stock Exchange PLC (CSE) within next 30 working days.

WALTONHIL

The company has informed that Mr. S. M. Rezaul Alam, a Sponsor Director of the company, has completed his transfer of 6,060,000 shares of the company to his daughter Ms. Roshmi Ruhi and 6,060,000 shares of the company to his spouse Ms. Fahima Husna as per declaration disseminated by DSE on 22.01.2025.

RAHIMAFOD

The Company will be placed in 'A' category from existing 'Z' category with effect from February 12, 2025 as the Company has reported disbursement of 10% Cash Dividend for the year ended June 30, 2024.

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