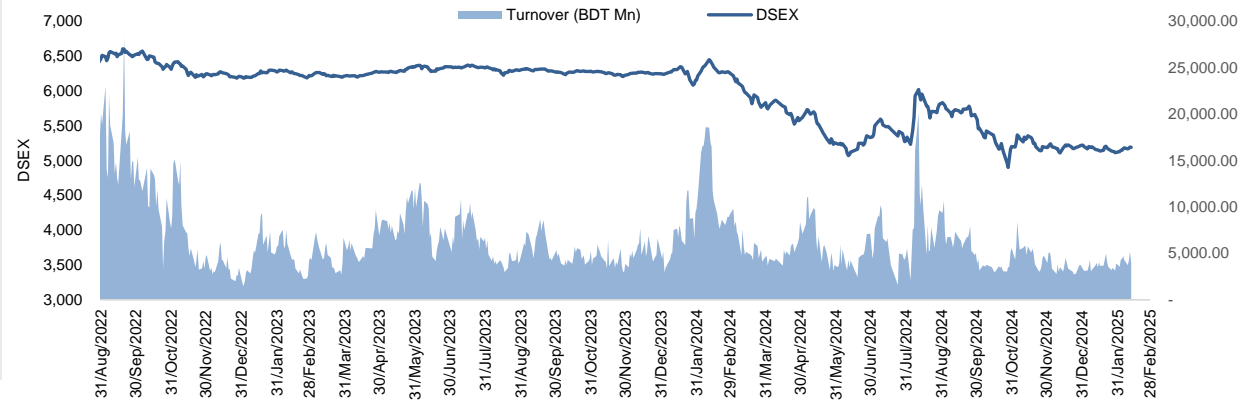


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.05%) lost 2.43 points and closed at 5,189.62. The blue-chip index DS30 (-0.04%), the Shariah-based index DSES (-0.03%), and the large-cap index CDSET (+0.04%) closed at 1,913.38, 1,152.35, and 1,050.34 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.24%, followed by Telecommunication (+0.20%), Food & Allied (+0.02%), Bank (-0.05%), Fuel & Power (-0.44%), Engineering (-0.55%), and NBF1 (-0.63%), respectively. Block trades contributed 1.4% of the overall market turnover. Taufika Foods and LOVELLO Ice-cream PLC (+2.0%) was the most traded share with a turnover of BDT 165 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,189.62	5,192.05	-2.43	-0.05%	-0.5%
DS30	1,913.38	1,914.07	-0.69	-0.04%	-1.4%
DSES	1,152.35	1,152.70	-0.35	-0.03%	-1.4%
CDSET	1,050.34	1,049.96	+0.38	+0.04%	-1.5%

	Advanced	Declined	Unchanged	Total
All Category	143	209	47	399
A Category (Equity)	71	120	30	221
B Category (Equity)	25	46	7	78
N Category (Equity)	0	0	0	0
Z Category (Equity)	47	43	10	100
Mutual Funds	25	2	10	37
Corporate Bonds	1	1	1	3
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,856,956	6,840,427	+0.2%
	Mn USD	56,205	56,069	
Turnover	Mn BDT	3,912	5,196	-24.7%
	Mn USD	32	43	
Volume	Mn Shares	165	196	-16.0%
No. of Trade		136,948	159,152	-14.0%

* Average Interbank Exchange Rate is BDT 122.00 as of Feb 12, 2025

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Figure: Sectorial Turnover (BDT Mn)

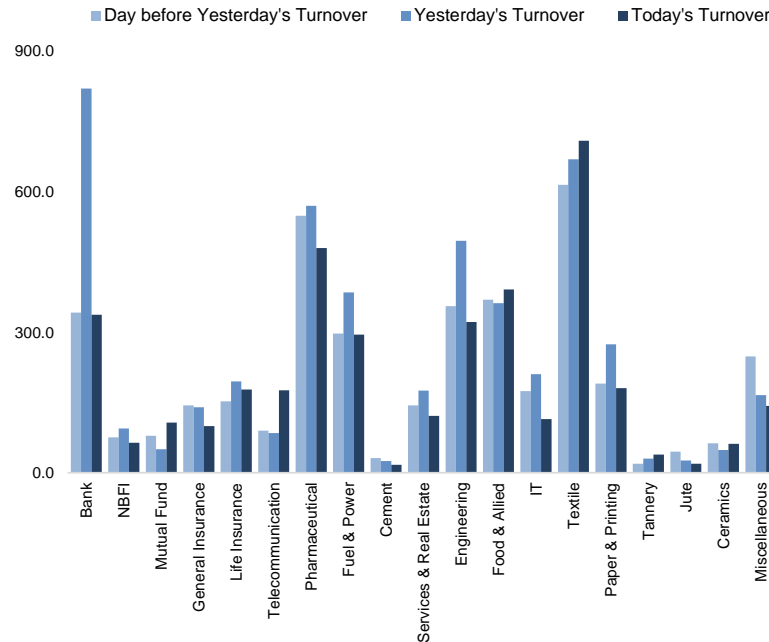
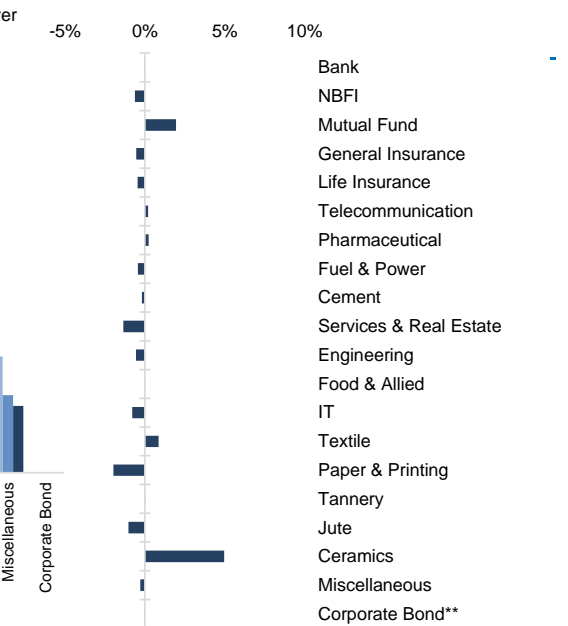


Figure: Sectorial Mcap Change



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	1,430	1,431	-0.68	-0.05%	36	676,558	9.9%	337.4	8.7%	8.7x	0.7x	GP	454,916	12.7%	52.5	12.5x	7.0x
NBFI	1,093	1,100	-6.88	-0.63%	23	104,173	1.5%	63.9	1.7%	NM	NM	SQURPHARMA	191,030	5.3%	20.6	8.5x	1.5x
Mutual Fund	576	565	+11.02	+1.95%	37	26,475	0.4%	107.3	2.8%	NM	0.5x	BATBC	187,272	5.2%	21.5	10.7x	3.2x
General Insurance	2,587	2,601	-13.94	-0.54%	43	73,861	1.1%	99.7	2.6%	13.1x	1.1x	ROBI	151,900	4.2%	122.1	27.6x	2.3x
Life Insurance	1,749	1,757	-8.10	-0.46%	15	46,522	0.7%	177.8	4.6%	NM	NM	WALTONHIL	147,980	4.1%	6.7	11.2x	1.3x
Telecommunication	5,371	5,360	+10.78	+0.20%	3	629,747	9.2%	176.2	4.6%	14.6x	4.3x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,859	2,852	+6.76	+0.24%	34	542,041	8.0%	479.6	12.4%	13.1x	1.5x	BRACBANK	91,317	2.5%	23.8	8.2x	1.2x
Fuel & Power	1,119	1,124	-4.95	-0.44%	23	296,530	4.4%	294.8	7.6%	19.7x	0.6x	BERGERPBL	83,694	2.3%	0.1	24.4x	5.8x
Cement	1,829	1,832	-3.53	-0.19%	7	87,141	1.3%	17.2	0.4%	16.8x	1.9x	MARICO	74,750	2.1%	2.3	13.4x	9.8x
Services & Real Estate	1,007	1,021	-13.69	-1.34%	9	55,390	0.8%	121.5	3.2%	19.7x	0.4x	UPGDCL	70,723	2.0%	1.9	6.7x	1.9x
Engineering	2,517	2,531	-13.94	-0.55%	42	283,899	4.2%	321.7	8.3%	12.9x	0.9x	RENATA	57,532	1.6%	6.5	19.4x	1.7x
Food & Allied	16,473	16,470	+2.73	+0.02%	21	301,403	4.4%	391.2	10.1%	16.4x	4.5x	LHB	57,023	1.6%	5.6	14.1x	2.8x
IT	2,001	2,017	-15.84	-0.79%	11	26,398	0.4%	114.6	3.0%	20.5x	1.7x	UNILEVERCL	49,400	1.4%	0.0	67.2x	21.0x
Textile	1,166	1,156	+9.92	+0.86%	58	121,392	1.8%	708.8	18.4%	72.9x	0.8x	ICB	45,618	1.3%	6.7	36.0x	1.0x
Paper & Printing	4,251	4,336	-85.33	-1.97%	6	19,204	0.3%	180.8	4.7%	NM	0.9x	DUTCHBANGL	45,259	1.3%	3.2	7.2x	0.9x
Tannery	1,969	1,968	+0.33	+0.02%	6	21,936	0.3%	38.9	1.0%	NM	1.6x	EBL	34,768	1.0%	4.2	5.3x	0.8x
Jute	12,235	12,361	-126.16	-1.02%	3	2,693	0.0%	19.5	0.5%	NM	NM	BXPHARMA	34,172	1.0%	3.8	5.3x	0.7x
Ceramics	399	381	+18.93	+4.97%	5	17,921	0.3%	61.9	1.6%	NM	1.1x	PUBALIBANK	34,127	1.0%	8.6	3.6x	0.6x
Miscellaneous	4,283	4,296	-12.56	-0.29%	15	232,585	3.4%	142.9	3.7%	96.5x	1.9x	POWERGRID	33,994	0.9%	17.7	NM	0.3x
Corporate Bond**	15,392	15,397	-4.34	-0.03%	16	33,712	0.5%	0.2	0.0%	NM	NM	MJLBD	31,295	0.9%	51.8	9.5x	2.0x
Treasury Bond**	1,141	1,093	+47.33	+4.33%	234	3,211,212	47.1%	0.5	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NURANI	4.4	+10.0%	2.7	NM	0.5x
EMERALDOIL	25.4	+10.0%	24.7	21.7x	NM
APOLOISPAT	4.5	+9.8%	7.2	NM	0.2x
TOSRIFA	21.5	+9.7%	28.0	40.6x	0.7x
VFSTDL	9.1	+9.6%	14.4	47.9x	0.4x
ACTIVEFINE	9.2	+9.52%	10.5	NM	0.4x
RAKCERAMIC	25.5	+9.4%	34.9	NM	1x
NEWLINE	11.7	+9.3%	61.0	NM	0.5x
DELTASPINN	7.5	+8.7%	18.2	NM	0.6x
ATCSLGF	6.4	+8.5%	3.7	NM	0.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	108,958	7.7%	8.5x	1.5x
ISLAMIBANK	74,730	5.3%	14.9x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.7x	3.2x
WALTONHIL	46,773	3.3%	11.2x	1.3x
BRACBANK	46,489	3.3%	8.2x	1.2x
GP	44,708	3.2%	12.5x	7.0x
RENATA	32,968	2.3%	19.4x	1.7x
BXPHARMA	23,409	1.7%	5.3x	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%	16.2x	2.6x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LOVELLO	85.7	+2.0%	164.5	38.6x	6.8x
ROBI	29.0	+1.0%	122.1	27.6x	2.3x
ORIONINFU	372.4	+1.1%	108.0	NM	24.3x
KOHINOOR	555.0	+3.0%	83.7	33.6x	9.2x
AL-HAJTEX	145.0	-0.4%	78.3	NM	17.2x
SIMTEX	19.5	+3.7%	64.1	18.8x	0.9x
NEWLINE	11.7	+9.3%	61.0	NM	0.5x
SBACBANK	9.2	+8.2%	60.3	4.8x	0.6x
CITYBANK	22.8	+0.4%	57.6	4.3x	0.8x
RDFOOD	24.8	+1.2%	57.4	27.6x	1.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FAREASTFIN	3.2	-5.9%	1.0	NM	NM
KPPL	28.1	-5.7%	41.3	NM	NM
FIRSTFIN	3.4	-5.6%	0.2	NM	NM
EPGL	22.1	-5.6%	36.6	NM	0.6x
BIFC	7.7	-4.9%	0.5	NM	NM
LRBDL	15.8	-4.8%	13.9	NM	0.4x
MERCINS	23.8	-4.4%	0.4	29.8x	1.2x
IBP	9.7	-4.0%	2.3	NM	0.7x
PLFSL	2.5	-3.8%	0.8	NM	NM
BDAUTOCA	93.2	-3.8%	4.3	NM	12.7x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BXPHARMA	76.5	76.5	1.0	200	15.30
BEACHHATCH	106.7	100.5	4.0	64	6.57
RELIANCE1	21.1	20.5	4.0	305	6.30
LOVELLO	84.0	80.0	5.0	73	6.04
ACFL	18.8	18.8	1.0	185	3.48
SUNLIFEINS	68.0	63.9	3.0	52	3.33
SBACBANK	8.7	8.7	1.0	273	2.38
KPPL	29.2	29.2	1.0	70	2.04
LINDEBD	907.0	906.8	2.0	2	1.75
BEACONPHAR	136.5	136.0	2.0	10	1.39

* 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
BXPHERMA	76.5	76.5	15.3	200	1
BEACHHATCH	106.7	100.5	6.6	64	4
RELIANCE1	21.1	20.5	6.3	305	4
LOVELLO	84.0	80.0	6.0	73	5
ACFL	18.8	18.8	3.5	185	1
SUNLIFEINS	68.0	63.9	3.3	52	3
SBACBANK	8.7	8.7	2.4	273	1
KPPL	29.2	29.2	2.0	70	1
LINDEBD	907.0	906.8	1.8	2	2
BEACONPHAR	136.5	136.0	1.4	10	2
NRBBANK	13.1	13.0	1.0	80	2
AL-HAJTEX	138.0	138.0	1.0	7	1
POPULARLIF	44.0	44.0	0.9	20	1
KBPPWBIL	160.0	160.0	0.9	5	1
BPML	25.2	25.2	0.7	26	1
1STPRIMFMF	20.0	20.0	0.6	30	1
SIMTEX	19.1	19.1	0.5	28	1
DUTCHBANGL	46.8	46.8	0.5	11	1
BEXIMCO	99.1	99.1	0.5	5	1
Total			55.1		34

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
GREENDELTA		0.0%	30.0%	Record Date	3-Mar-25

Important DSE News
GREENDELTA

The Board of Directors of the company has recommended 25% Cash Dividend for the year ended December 31, 2024. The Company has reported Consolidated EPS of Tk. 5.39, Consolidated NAV per share of Tk. 70.40 and Consolidated NOCFPS of Tk. 1.19 for the year ended December 31, 2024 as against Tk. 6.11, Tk. 73.18 and Tk. 5.98 respectively for the year ended December 31, 2023. Date of AGM: 27.03.2025. Record Date: 04.03.2025. Venue/Mode of AGM: Online Platform. Time: 11:00 AM.

AAMRANET

The Company has been placed in 'Z' category from existing 'A' category with effect from today i.e., 12.02.2025 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.

AAMRATECH

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., 12.02.2025 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.

SSSTEEL

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., 12.02.2025 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.

GOLDENSON

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., 12.02.2025 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.

SAMATALETH

The Company has been placed in 'Z' category from existing 'B' category with effect from today i.e., 12.02.2025 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.

AIL

The Company has been placed in 'A' category from existing 'Z' category with effect from today i.e., 12.02.2025 as the Company has reported disbursement of 10% Cash and 10% Stock Dividend for the year ended June 30, 2024.

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.