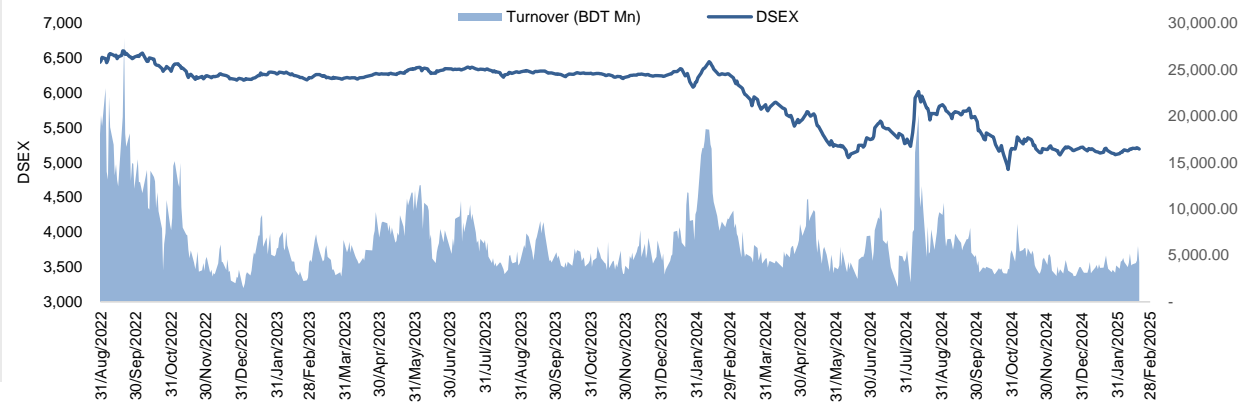


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.21%) lost 10.76 points and closed at 5,192.44. The blue-chip index DS30 (-0.49%), the Shariah-based index DSES (-0.20%), and the large-cap index CDSET (-0.20%) closed at 1,913.08, 1,157.93, and 1,052.15 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.83% followed by Food & Allied (-0.72%), Bank (-0.52%), Engineering (-0.37%), Telecommunication (-0.26%), Pharmaceutical (-0.19%), and Fuel & Power (-0.11%), respectively. Block trades contributed 5.5% of the overall market turnover. Midland Bank Limited (-9.1%) was the most traded share with a turnover of BDT 228 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,192.44	5,203.20	-10.76	-0.21%	-0.5%
DS30	1,913.08	1,922.43	-9.35	-0.49%	-1.4%
DSES	1,157.93	1,160.23	-2.30	-0.20%	-0.9%
CDSET	1,052.15	1,054.30	-2.15	-0.20%	-1.3%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	103	228	67	398
<b>A Category (Equity)</b>	60	120	39	219
<b>B Category (Equity)</b>	26	42	12	80
<b>N Category (Equity)</b>	0	0	0	0
<b>Z Category (Equity)</b>	17	66	16	99
<b>Mutual Funds</b>	6	20	11	37
<b>Corporate Bonds</b>	1	1	0	2
<b>Treasury Bonds</b>	0	2	0	2

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	6,938,342	6,947,595	-0.1%
Mn USD	56,872	56,947	
<b>Turnover</b>			
Mn BDT	4,271	5,994	-28.7%
Mn USD	35	49	
<b>Volume</b>			
Mn Shares	159	221	-27.8%
<b>No. of Trade</b>	132,020	168,822	-21.8%

\* Average Interbank Exchange Rate is BDT 122.00 as of Feb 19, 2025

<b>Fahim Hassan</b> Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	<b>Md Istiaz Uddin</b> Research Associate (880) 1708805202 mistiaz.uddin@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

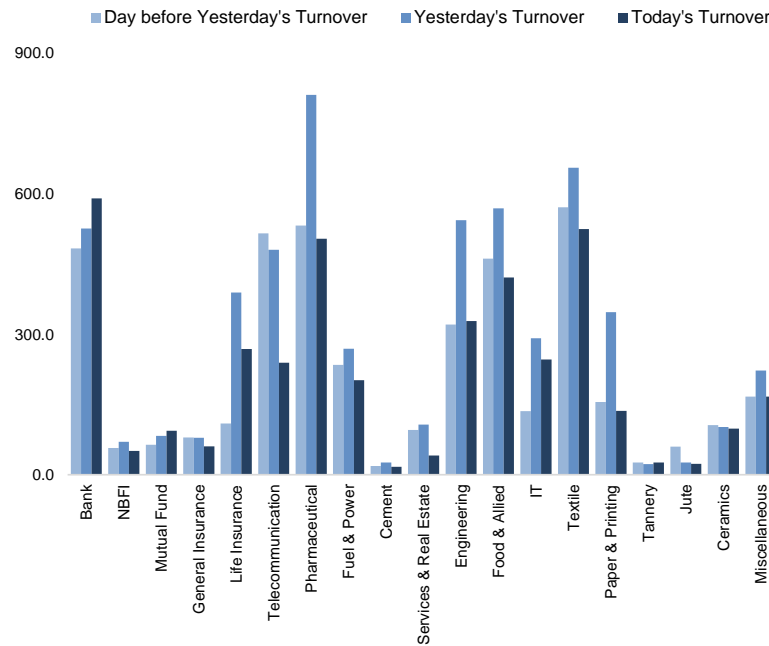
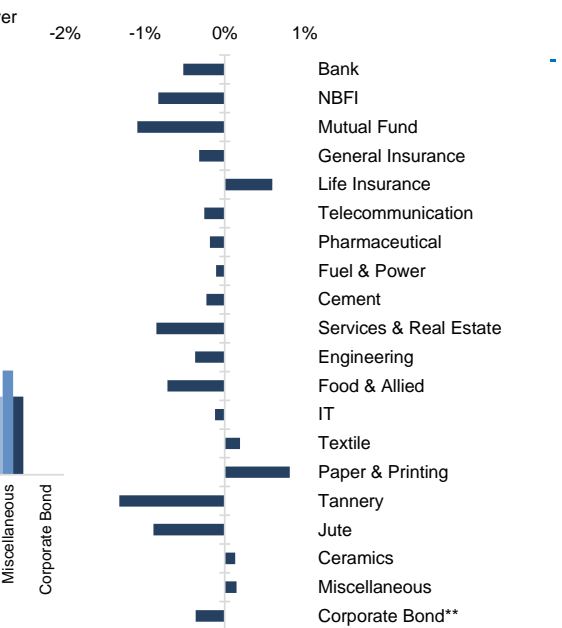


Figure: Sectorial Mcap Change



Market PE 15.0x  
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	1,442	-7.48	-0.52%	36	678,812	9.8%	590.0	14.6%	8.8x	0.7x	GP	464,098	12.9%	121.8	12.8x	7.2x
NBFI	1,076	1,085	-9.04	-0.83%	23	102,573	1.5%	50.6	1.3%	NM	NM	SQURPHARMA	191,473	5.3%	64.6	8.6x	1.5x
Mutual Fund	570	577	-6.31	-1.09%	37	26,216	0.4%	93.9	2.3%	NM	0.5x	BATBC	184,302	5.1%	99.3	10.5x	3.2x
General Insurance	2,567	2,575	-8.21	-0.32%	43	73,285	1.1%	60.8	1.5%	13.0x	1.1x	ROBI	151,900	4.2%	101.4	21.6x	2.2x
Life Insurance	1,777	1,767	+10.55	+0.60%	15	47,270	0.7%	268.5	6.6%	NM	NM	WALTONHIL	145,224	4.0%	4.2	11.0x	1.3x
Telecommunication	5,451	5,465	-14.07	-0.26%	3	639,191	9.3%	239.0	5.9%	14.3x	4.3x	BEXIMCO	103,850	2.9%	0.1	NM	1.3x
Pharmaceutical	2,872	2,878	-5.34	-0.19%	34	544,504	7.9%	503.7	12.5%	13.2x	1.5x	BRACBANK	93,087	2.6%	50.0	8.4x	1.2x
Fuel & Power	1,103	1,105	-1.20	-0.11%	23	292,312	4.2%	201.9	5.0%	16.6x	0.6x	BERGERPBL	83,248	2.3%	0.1	24.3x	5.7x
Cement	1,848	1,853	-4.26	-0.23%	7	88,084	1.3%	17.0	0.4%	16.9x	1.9x	MARICO	75,761	2.1%	20.4	13.5x	10.0x
Services & Real Estate	991	1,000	-8.56	-0.86%	9	54,518	0.8%	41.1	1.0%	19.4x	0.4x	UPGDCL	70,375	2.0%	1.8	6.6x	1.9x
Engineering	2,500	2,509	-9.26	-0.37%	42	281,982	4.1%	328.2	8.1%	12.8x	0.9x	RENATA	59,516	1.7%	7.2	20.1x	1.7x
Food & Allied	16,327	16,445	-117.83	-0.72%	21	298,745	4.3%	421.2	10.4%	16.2x	4.4x	LHB	58,301	1.6%	10.6	14.4x	2.9x
IT	2,020	2,022	-2.44	-0.12%	11	26,642	0.4%	245.8	6.1%	20.7x	1.7x	UNILEVERCL	48,918	1.4%	0.1	66.6x	20.8x
Textile	1,165	1,163	+2.24	+0.19%	58	121,367	1.8%	524.5	13.0%	72.9x	0.8x	DUTCHBANGL	45,523	1.3%	10.5	7.3x	0.9x
Paper & Printing	4,333	4,298	+35.03	+0.81%	6	19,577	0.3%	136.2	3.4%	NM	0.9x	ICB	44,837	1.3%	11.3	35.4x	1.0x
Tannery	1,945	1,971	-26.04	-1.32%	6	21,672	0.3%	25.9	0.6%	NM	1.6x	EBL	35,040	1.0%	2.4	5.4x	0.8x
Jute	12,378	12,490	-111.65	-0.89%	3	2,725	0.0%	23.2	0.6%	NM	NM	BXPHARMA	34,172	1.0%	6.1	5.3x	0.7x
Ceramics	390	390	+0.51	+0.13%	5	17,519	0.3%	98.3	2.4%	NM	1.1x	PUBALIBANK	33,548	0.9%	15.2	3.5x	0.6x
Miscellaneous	4,273	4,267	+6.37	+0.15%	15	232,046	3.4%	166.9	4.1%	94.9x	1.9x	POWERGRID	32,897	0.9%	4.9	NM	0.3x
Corporate Bond**	15,290	15,346	-55.70	-0.36%	16	33,488	0.5%	0.1	0.0%	NM	NM	CITYBANK	31,236	0.9%	48.3	4.4x	0.8x
Treasury Bond**	1,255	1,240	+15.51	+1.25%	234	3,294,831	47.8%	1.3	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
INTECH	23.4	+9.9%	34.5	NM	NM
SPCERAMICS	13.4	+9.8%	58.5	NM	0.5x
EBL1STMF	4.5	+9.8%	4.1	NM	0.5x
SALAMCRST	14.0	+9.4%	10.4	87.5x	0.8x
EPGL	22.3	+6.7%	36.1	NM	0.6x
GHAIL	12.2	+5.17%	21.7	NM	1.0x
SIMTEX	21.3	+4.9%	64.1	20.5x	1x
AIL	81.8	+4.9%	21.9	30.7x	3.5x
TOSRIFA	25.8	+4.5%	63.8	48.7x	0.8x
AMANFEED	28.4	+4.4%	29.2	NM	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MIDLANDBNK	25.1	-9.1%	228.5	14.5x	1.7x
EXIM1STMF	3.1	-8.8%	1.6	NM	0x
NEWLINE	11.2	-5.9%	29.0	NM	0.5x
GENNEXT	3.4	-5.6%	10.9	NM	0.3x
ARAMIT	160.6	-4.7%	0.3	42.9x	1.3x
NURANI	4.1	-4.7%	0.8	NM	0.4x
PHOENIXFIN	4.1	-4.7%	1.3	NM	NM
REGENTTEX	4.3	-4.4%	0.5	NM	0.2x
PURABIGEN	18.3	-3.7%	0.3	10.4x	1.3x
METROSPIN	13.1	-3.7%	1.6	NM	2.5x

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%	10.5x	3.2x
WALTONHIL	46,773	3.3%	11.0x	1.3x
BRACBANK	46,489	3.3%	8.4x	1.2x
GP	44,708	3.2%	12.8x	7.2x
RENATA	32,968	2.3%	20.1x	1.7x
BXPHARMA	23,409	1.7%	5.3x	0.7x
PUBALIBANK	22,905	1.6%	3.5x	0.6x
CITYBANK	21,020	1.5%	4.4x	0.8x
LHB	20,953	1.5%	14.4x	2.9x
OLYMPIC	20,496	1.5%	16.3x	2.6x
ALARABANK	18,282	1.3%	12.8x	0.9x
BEACONPHAR	17,838	1.3%	50.1x	4.4x
PRIMEBANK	16,142	1.1%	4.5x	0.7x
ROBI	14,876	1.1%	21.6x	2.2x
UTTARABANK	13,699	1.0%	9.0x	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	25.1	-9.1%	228.5	14.5x	1.7x
LOVELLO	85.6	+0.5%	143.2	38.6x	6.8x
ORIONINFU	376.6	-1.8%	124.3	NM	24.6x
GP	343.7	-0.0%	121.8	12.8x	7.2x
ROBI	29.0	-1.0%	101.4	21.6x	2.2x
BATBC	341.3	-1.0%	99.3	10.5x	3.2x
AGNISYSL	27.5	+1.5%	92.2	18.5x	1.6x
SUNLIFEINS	73.6	-1.2%	83.7	NM	NM
NRBBANK	13.8	-	72.1	22.7x	1.1x
MPETROLEUM	207.4	+0.0%	65.6	3.8x	0.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BXPHARMA	82.0	78.0	8.0	1,634	128.17
BEACHHATCH	120.0	109.0	13.0	186	21.57
TOSRIFA	24.5	24.4	5.0	663	16.19
JAMUNABANK	21.1	21.1	1.0	650	13.72
KBPPWBIL	146.6	145.1	5.0	55	8.00
ACI	155.8	155.8	3.0	47	7.32
SIMTEX	20.6	20.2	4.0	250	5.13
ACFL	18.9	18.9	1.0	244	4.61
PRAGATILIF	113.3	113.3	1.0	40	4.53
SQURPHARMA	224.9	214.9	3.0	16	3.42

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BXPHARMA	82.0	78.0	128.2	1,634	8
BEACHHATCH	120.0	109.0	21.6	186	13
TOSRIFA	24.5	24.4	16.2	663	5
JAMUNABANK	21.1	21.1	13.7	650	1
KBPPWBIL	146.6	145.1	8.0	55	5
ACI	155.8	155.8	7.3	47	3
SIMTEX	20.6	20.2	5.1	250	4
ACFL	18.9	18.9	4.6	244	1
PRAGATILIF	113.3	113.3	4.5	40	1
SQURPHARMA	224.9	214.9	3.4	16	3
MJLBD	97.0	97.0	2.9	30	2
MIDLANDBNK	28.2	28.2	2.8	100	2
LOVELLO	83.5	80.0	2.4	30	3
BEXIMCO	99.8	99.2	1.5	16	3
RUPALILIFE	98.5	98.5	1.5	15	1
MARICO	2,404.8	2,404.8	1.4	1	1
DUTCHBANGL	57.3	57.3	1.4	24	1
RELIANCE1	21.4	21.4	1.3	63	2
CVOPRL	130.0	130.0	1.3	10	2
AIL	81.0	81.0	1.0	12	1
SONALIANSH	200.0	200.0	0.9	5	1
SONARGAON	43.8	43.8	0.9	20	1
<b>Total</b>			<b>233.2</b>		<b>66</b>

**Important DSE News**
**GHAIL**

The company has informed that the Board of Directors has appointed Mr. Md. Ibrahim Hossain, ACS as the company secretary with effect from February 16, 2025.

**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
GREENDELT		0.0%	30.0%	Record Date	3-Mar-25
SUMITPOWER		0.0%	25.0%	Record Date	4-Mar-25
ROBI		0.0%	10.0%	Record Date	10-Mar-25

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