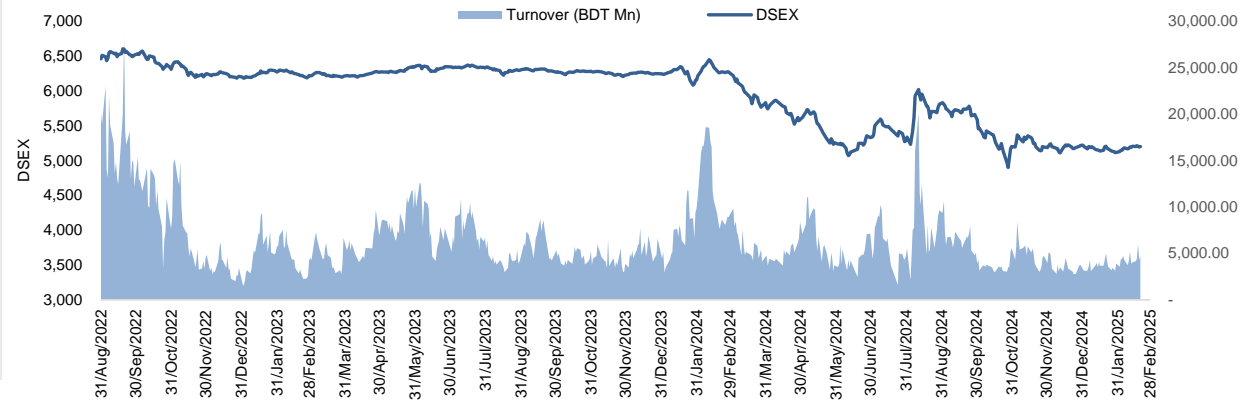


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.15%) gained 7.93 points and closed at 5,200.37. The blue-chip index DS30 (-0.17%), the Shariah-based index DSES (+0.43%), and the large-cap index CDSET (-0.02%) closed at 1,909.89, 1,162.92, and 1,051.93 points, respectively. Large-cap sectors posted mixed performance today. Telecommunication booked the highest gain of 0.52%, followed by Engineering (+0.07%), Pharmaceutical (+0.06%), NBF1 (-0.21%), Bank (-0.23%), Fuel & Power (-0.30%), and Food & Allied (-0.49%), respectively. Block trades contributed 3.6% of the overall market turnover. Grameenphone Ltd. (+0.6%) was the most traded share with a turnover of BDT 164 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,200.37	5,192.44	+7.93	+0.15%	-0.3%
DS30	1,909.89	1,913.08	-3.18	-0.17%	-1.5%
DSES	1,162.92	1,157.93	+4.99	+0.43%	-0.5%
CDSET	1,051.93	1,052.15	-0.22	-0.02%	-1.3%

	Advanced	Declined	Unchanged	Total
All Category	167	160	74	401
A Category (Equity)	68	108	45	221
B Category (Equity)	52	21	6	79
N Category (Equity)	0	1	0	1
Z Category (Equity)	47	30	23	100
Mutual Funds	5	11	21	37
Corporate Bonds	0	2	2	4
Treasury Bonds	2	1	0	3

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,951,916	6,938,342	+0.2%
Mn USD	56,983	56,872	
Turnover			
Mn BDT	4,657	4,271	+9.0%
Mn USD	38	35	
Volume			
Mn Shares	189	159	+18.8%
No. of Trade	141,912	132,020	+7.5%

* Average Interbank Exchange Rate is BDT 122.00 as of Feb 20, 2025

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Figure: Sectorial Turnover (BDT Mn)

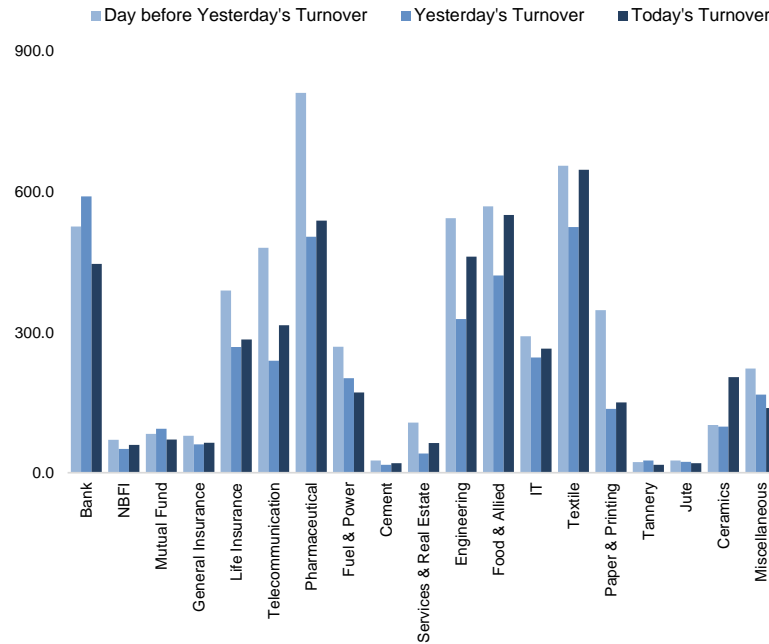
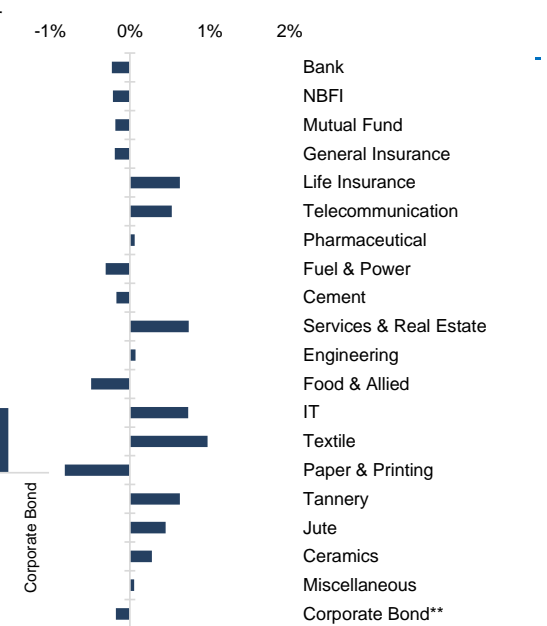


Figure: Sectorial Mcap Change



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	1,431	1,435	-3.25	-0.23%	36	677,272	9.8%	446.1	9.9%	8.7x	0.7x	GP	466,799	13.0%	164.2	12.9x	7.2x
NBFI	1,074	1,076	-2.29	-0.21%	23	102,355	1.5%	59.4	1.3%	NM	NM	SQURPHARMA	191,385	5.3%	61.5	8.6x	1.5x
Mutual Fund	569	570	-1.03	-0.18%	37	26,169	0.4%	70.9	1.6%	NM	0.5x	BATBC	183,060	5.1%	119.5	10.5x	3.2x
General Insurance	2,562	2,567	-4.87	-0.19%	43	73,146	1.1%	63.8	1.4%	13.0x	1.1x	ROBI	151,376	4.2%	111.8	21.6x	2.2x
Life Insurance	1,788	1,777	+11.13	+0.63%	15	47,566	0.7%	284.8	6.3%	NM	NM	WALTONHIL	144,921	4.0%	3.9	11.0x	1.3x
Telecommunication	5,480	5,451	+28.61	+0.52%	3	642,546	9.3%	314.8	7.0%	14.4x	4.3x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,874	2,872	+1.75	+0.06%	34	544,835	7.9%	538.3	12.0%	13.2x	1.5x	BRACBANK	91,848	2.6%	44.6	8.3x	1.2x
Fuel & Power	1,100	1,103	-3.34	-0.30%	23	291,428	4.2%	171.5	3.8%	16.6x	0.6x	BERGERPBL	83,489	2.3%	0.4	24.3x	5.8x
Cement	1,845	1,848	-3.10	-0.17%	7	87,936	1.3%	20.2	0.5%	16.9x	1.9x	MARICO	76,224	2.1%	26.8	13.6x	10.0x
Services & Real Estate	999	991	+7.32	+0.74%	9	54,920	0.8%	63.4	1.4%	19.5x	0.4x	UPGDCL	70,549	2.0%	2.1	6.7x	1.9x
Engineering	2,501	2,500	+1.76	+0.07%	42	282,181	4.1%	461.4	10.3%	12.8x	0.9x	RENATA	59,298	1.7%	3.9	20.0x	1.7x
Food & Allied	16,248	16,327	-79.26	-0.49%	21	297,294	4.3%	550.2	12.3%	16.2x	4.4x	LHB	58,301	1.6%	9.8	14.4x	2.9x
IT	2,035	2,020	+14.76	+0.73%	11	26,837	0.4%	265.3	5.9%	20.8x	1.7x	UNILEVERCL	48,668	1.4%	0.7	66.2x	20.7x
Textile	1,177	1,165	+11.32	+0.97%	58	122,546	1.8%	646.9	14.4%	73.6x	0.8x	DUTCHBANGL	45,523	1.3%	8.6	7.3x	0.9x
Paper & Printing	4,298	4,333	-35.27	-0.81%	6	19,418	0.3%	150.1	3.3%	NM	0.9x	ICB	44,490	1.2%	14.1	35.1x	1.0x
Tannery	1,957	1,945	+12.18	+0.63%	6	21,808	0.3%	16.7	0.4%	NM	1.6x	EBL	35,447	1.0%	7.6	5.4x	0.8x
Jute	12,433	12,378	+55.22	+0.45%	3	2,737	0.0%	20.6	0.5%	NM	NM	BXPHARMA	34,217	1.0%	4.3	5.3x	0.7x
Ceramics	392	390	+1.08	+0.28%	5	17,567	0.3%	203.9	4.5%	NM	1.1x	PUBALIBANK	33,548	0.9%	8.4	3.5x	0.6x
Miscellaneous	4,275	4,273	+2.34	+0.05%	15	232,173	3.4%	138.3	3.1%	95.0x	1.9x	POWERGRID	32,714	0.9%	4.7	NM	0.3x
Corporate Bond**	15,263	15,290	-26.70	-0.17%	16	33,429	0.5%	0.2	0.0%	NM	NM	CITYBANK	31,371	0.9%	62.6	4.4x	0.8x
Treasury Bond**	1,275	1,255	+19.29	+1.54%	234	3,306,211	47.8%	1.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
FUWANGFOOD	15.4	+10.0%	113.0	NM	7.4x
SALAMCRST	15.4	+10.0%	4.5	96.3x	0.8x
GHAIL	13.4	+9.8%	61.1	NM	1.1x
BDTHAIFOOD	15.7	+9.8%	28.3	NM	1.1x
SPCERAMICS	14.7	+9.7%	63.2	NM	0.5x
ZAHEENSPIN	8.0	+9.59%	22.1	NM	2.1x
FUWANGCER	14.7	+7.3%	108.5	86.5x	1x
IBP	11.1	+6.7%	5.5	NM	0.8x
DESHBANDHU	19.2	+6.7%	26.4	NM	1.1x
DACCADYE	18.1	+6.5%	6.9	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%	8.6x	1.5x
ISLAMIBANK	74,730	5.3%	14.9x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.5x	3.2x
WALTONHIL	46,773	3.3%	11.0x	1.3x
BRACBANK	46,489	3.3%	8.3x	1.2x
GP	44,708	3.2%	12.9x	7.2x
RENATA	32,968	2.3%	20.0x	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%	16.1x	2.6x
ALARABANK	18,282	1.3%	13.3x	1.0x
BEACONPHAR	17,838	1.3%	49.7x	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

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GP	345.7	+0.6%	164.2	12.9x	7.2x
SUNLIFEINS	75.4	+2.4%	149.6	NM	NM
BATBC	339.0	-0.7%	119.5	10.5x	3.2x
FUWANGFOOD	15.4	+10.0%	113.0	NM	7.4x
ROBI	28.9	-0.3%	111.8	21.6x	2.2x
AGNISYSL	28.4	+3.3%	111.7	19.1x	1.6x
FUWANGCER	14.7	+7.3%	108.5	86.5x	1.2x
ORIONINFU	376.5	-0.0%	107.6	NM	24.6x
MIDLANDBNK	23.0	-8.4%	104.4	13.3x	1.6x
MONNOFABR	17.4	+4.8%	94.7	NM	0.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MIDLANDBNK	23.0	-8.4%	104.4	13.3x	1.6x
ICBPMF1S1	4.7	-6.0%	0.2	NM	1x
FIRSTFIN	3.4	-5.6%	0.1	NM	NM
EPGL	21.1	-5.4%	25.4	NM	0.6x
VFSTDL	8.5	-3.4%	4.8	44.7x	0.4x
IFIC1STMF	3.0	-3.2%	1.3	NM	0.3x
TUNGHAI	3.1	-3.1%	0.3	NM	NM
ANLIMAYARN	23.1	-2.9%	0.3	NM	3.1x
ESQUIRENIT	23.8	-2.9%	9.2	14.0x	0.4x
PROVATIINS	32.0	-2.7%	4.9	21.9x	1.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BXPHARMA	76.5	76.5	1.0	450	34.43
ORIONINFU	380.0	351.0	3.0	95	33.53
NATLIFEINS	94.0	90.5	5.0	231	21.26
PADMAOIL	166.9	166.5	2.0	113	18.82
LOVELLO	81.0	81.0	1.0	100	8.10
BEACHHATCH	113.6	105.0	5.0	62	6.79
ACI	155.8	155.8	3.0	42	6.57
AGNISYSL	27.7	27.5	2.0	170	4.69
KBPPWBIL	151.0	151.0	2.0	31	4.68
SUNLIFEINS	73.0	70.5	2.0	57	4.18

* 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	34.4	450	1
ORIONINFU	380.0	351.0	33.5	95	3
NATLIFEINS	94.0	90.5	21.3	231	5
PADMAOIL	166.9	166.5	18.8	113	2
LOVELLO	81.0	81.0	8.1	100	1
BEACHHATCH	113.6	105.0	6.8	62	5
ACI	155.8	155.8	6.6	42	3
AGNISYSL	27.7	27.5	4.7	170	2
KBPPWBIL	151.0	151.0	4.7	31	2
SUNLIFEINS	73.0	70.5	4.2	57	2
GPHISPAT	22.9	22.9	3.4	150	1
NAVANAPHAR	51.8	51.8	3.0	58	3
PEOPLESINS	29.9	29.8	1.8	60	2
SONALIANS	199.9	199.9	1.5	8	1
CAPMBDBLMF	7.0	7.0	1.4	200	2
SONARGAON	43.1	43.0	1.3	30	2
JMISMMDL	140.5	140.5	1.3	9	1
AL-HAJTEX	138.4	138.1	1.2	9	2
BEACONPHAR	136.6	136.0	1.2	8	2
NRBBANK	13.4	13.4	1.1	80	1
SIMTEX	20.4	20.4	1.0	50	1
BEXIMCO	99.1	99.1	1.0	10	2
Total			169.4		57

Important DSE News
AIL

Mr. Md. Azimul Islam, a Director of the company, has expressed his intention to transfer 500,000 shares of the company to his sister Ms. Lubna Islam (General Shareholder of the company), by way of gift outside the trading system of the Exchange within next thirty working days with effect from February 19, 2025.

RUPALIINS

The company has informed that the Board of Directors has elected Mr. Mostafa Quamrus Sobhan as the Chairman of the company.

DAFODILCOM

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Daffodil Computers PLC.' instead of 'Daffodil Computers Ltd.' with effect from February 23, 2025. Other things (except name) will remain unchanged.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
MARICO	0.0%	440.0%		Record Date	23-Feb-25
GP	0.0%	440.0%		Record Date	23-Feb-25
BATBC	0.0%	440.0%		Record Date	23-Feb-25
SIPLC	0.0%	440.0%		Record Date	23-Feb-25
CITYGENINS	0.0%	170.0%		Record Date	26-Feb-25
CRYSTALINS	0.0%	150.0%		Record Date	26-Feb-25
RELIANCINS	0.0%	15.0%		Record Date	27-Feb-25
GREENDELTA	0.0%	10.0%		Record Date	27-Feb-25
SUMITPOWER	0.0%	12.0%		Record Date	2-Mar-25
ROBI	0.0%	30.0%		Record Date	3-Mar-25
TOSRIFA	0.0%	25.0%		Record Date	4-Mar-25
MIRACLEIND	0.0%	10.0%		Record Date	10-Mar-25

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