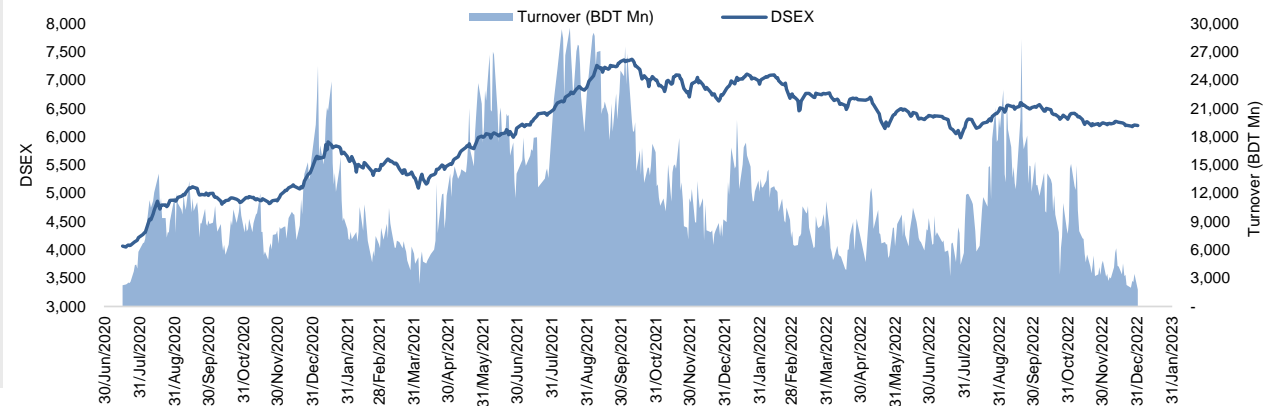


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.18%) lost 11.44 points and closed at 6,195.37. The blue-chip index DS30 (-0.08%), the Shariah-based index DSES (-0.24%), and the large-cap index CDSET (-0.02%) closed at 2,193.60, 1,355.59, and 1,214.16 points, respectively. Most of the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.25% followed by Food & Allied (-0.21%), Engineering (-0.11%), Fuel & Power (-0.04%), NBF1 (-0.01%), Telecommunication (0.00%), and Bank (+0.13%), respectively. Block trades contributed 8.1% of the overall market turnover. Orion Infusion Ltd. (+0.6%) was the most traded share with a turnover of BDT 181 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,195.37	6,206.81	-11.44	-0.18%	-0.2%
DS30	2,193.60	2,195.30	-1.70	-0.08%	-0.1%
DSES	1,355.59	1,358.84	-3.24	-0.24%	-0.2%
CDSET	1,214.16	1,214.42	-0.26	-0.02%	-0.0%

	Advanced	Declined	Unchanged	Total
All Category	20	150	162	332
A Category (Equity)	15	84	119	218
B Category (Equity)	3	50	32	85
N Category (Equity)	1	5	3	9
Z Category (Equity)	1	11	8	20
Mutual Funds	0	4	16	20
Corporate Bonds	0	1	1	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,602,649	7,609,369	-0.1%
	Mn USD	72,503	72,567	
Turnover	Mn BDT	1,784	3,457	-48.4%
	Mn USD	17	33	
Volume	Mn Shares	27	45	-40.1%
No. of Trade		55,990	70,684	-20.8%

\* Average Interbank Exchange Rate is BDT 104.86 as of Dec 29, 2022

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Figure: Sectorial Turnover (BDT Mn)

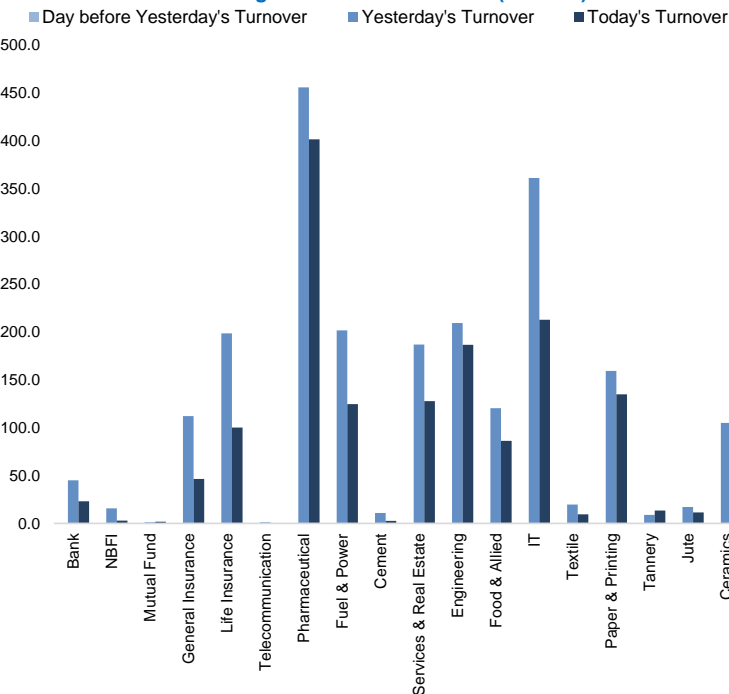
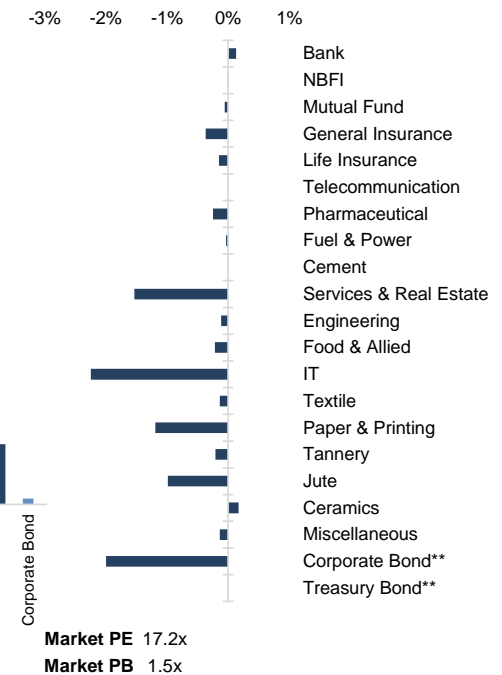


Figure: Sectorial Mcap Change



Market PE 17.2x

Market PB 1.5x

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	1,429	1,427	+1.91	+0.13%	34	667,518	8.8%	23.1	1.4%	7.7x	0.7x	GP	386,996	8.7%	0.3	11.2x	9.1x
NBFI	1,927	1,927	-0.15	-0.01%	23	188,001	2.5%	3.0	0.2%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	852	852	-0.46	-0.05%	37	38,511	0.5%	1.7	0.1%	NM	0.8x	BATBC	280,098	6.3%	0.4	16.8x	6.7x
General Insurance	3,166	3,178	-11.67	-0.37%	42	92,409	1.2%	46.3	2.8%	15.5x	1.5x	SQURPHARMA	185,977	4.2%	1.3	10.0x	1.7x
Life Insurance	2,489	2,493	-3.66	-0.15%	14	69,809	0.9%	100.1	6.1%	NM	NM	ROBI	157,138	3.5%	0.0	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	0.4	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.3	28.1x	4.6x
Pharmaceutical	3,745	3,754	-9.25	-0.25%	34	726,506	9.6%	401.3	24.5%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.0	13.6x	3.8x
Fuel & Power	1,694	1,694	-0.59	-0.04%	23	446,558	5.9%	124.5	7.6%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.1	8.2x	1.2x
Cement	2,320	2,320	+0.10	+0.00%	7	111,418	1.5%	2.7	0.2%	33.5x	2.5x	BERGERPBL	80,011	1.8%	0.5	26.0x	7.0x
Services & Real Estate	1,755	1,782	-27.29	-1.53%	8	69,335	0.9%	127.7	7.8%	39.2x	0.9x	MARICO	76,277	1.7%	1.5	21.3x	44.9x
Engineering	4,498	4,503	-5.05	-0.11%	42	527,961	6.9%	186.6	11.4%	38.6x	1.8x	ICB	74,119	1.7%	0.1	68.1x	1.6x
Food & Allied	21,202	21,248	-45.53	-0.21%	21	377,793	5.0%	86.1	5.3%	21.4x	7.4x	BEACONPHAR	65,604	1.5%	10.1	80.7x	10.6x
IT	2,937	3,004	-67.39	-2.24%	11	38,289	0.5%	212.7	13.0%	27.3x	2.6x	BXPBARMA	65,222	1.5%	10.9	12.8x	1.6x
Textile	1,620	1,622	-2.17	-0.13%	58	170,372	2.2%	9.5	0.6%	31.0x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	10,265	10,388	-123.57	-1.19%	6	39,548	0.5%	134.7	8.2%	44.5x	2.0x	ISLAMIBANK	53,613	1.2%	4.9	10.9x	0.8x
Tannery	3,087	3,093	-6.42	-0.21%	6	32,603	0.4%	13.4	0.8%	39.6x	3.0x	DUTCHBANGL	43,554	1.0%	1.3	7.4x	1.1x
Jute	14,704	14,850	-145.94	-0.98%	3	3,597	0.0%	11.4	0.7%	NM	126.9x	TITASGAS	40,459	0.9%	0.1	14.2x	0.5x
Ceramics	706	705	+1.20	+0.17%	5	32,650	0.4%	90.3	5.5%	34.2x	1.9x	POWERGRID	37,347	0.8%	0.0	38.5x	0.4x
Miscellaneous	4,066	4,071	-5.49	-0.13%	14	219,137	2.9%	63.0	3.8%	12.2x	1.8x	SUMITPOWER	36,308	0.8%	0.2	10.0x	0.9x
Corporate Bond**	89	91	-1.82	-2.00%	9	36,840	0.5%	0.3	0.0%	NM	NM	BSCCL	36,098	0.8%	0.0	14.9x	3.4x
Treasury Bond**	98	98	+0.00	+0.00%	252	3,135,950	41.2%	0.0	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
ICICL	30.9	+10.0%	0.0	34.2x	2.0x	SQURPHARMA	121,685	7.3%	10.0x	1.7x	ORIONINFU	530.8	+0.6%	180.5	NM	35.9x
MERCINS	31.8	+3.9%	0.1	14.3x	1.5x	BATBC	74,086	4.4%	16.8x	6.7x	INTRACO	39.9	-1.5%	106.8	32.3x	3.1x
BENGALWTL	30.7	+2.0%	87.9	60.2x	1.2x	BEXIMCO	70,355	4.2%	8.2x	1.2x	BPML	73.5	-2.8%	96.9	19.7x	1.0x
FINEFOODS	60.7	+1.7%	5.4	NM	5.7x	RENATA	68,196	4.1%	28.1x	4.6x	ORIONPHARM	80.9	-2.2%	89.4	20.0x	0.9x
MEGHNALIFE	65.2	+1.4%	9.9	NM	NM	BEACONPHAR	45,923	2.7%	80.7x	10.6x	BENGALWTL	30.7	+2.0%	87.9	60.2x	1.2x
MONNOCERA	124.2	+1.2%	87.7	NM	1.5x	BXPBARMA	45,538	2.7%	12.8x	1.6x	MONNOCERA	124.2	+1.2%	87.7	NM	1.5x
ISLAMIBANK	33.3	+0.9%	4.9	10.9x	1x	GP	38,700	2.3%	11.2x	9.1x	GENEXIL	78.6	-3.0%	87.6	22.7x	4.3x
MEGHNACEM	65.7	+0.8%	0.0	37.7x	1.2x	BRACBANK	30,976	1.8%	10.9x	1.0x	AAMRANET	50.3	-2.1%	54.3	22.0x	1.4x
PUBALIBANK	26.5	+0.8%	0.9	5.5x	0.6x	LHBL	26,581	1.6%	18.4x	4.1x	BSC	113.2	-1.8%	52.5	7.8x	1.5x
APEXFOOT	263.8	+0.6%	12.9	23.7x	1.1x	ISLAMIBANK	24,083	1.4%	10.9x	0.8x	EHL	76.7	-2.8%	43.2	12.4x	1.0x

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)
ANWARGALV	225.6	-4.5%	30.9	51.5x	19.0x	PUBALIBANK	18,666	1.1%	5.5x	0.6x	BEACONPHAR	262.0	262.0	3.0	120	31.31
EGEN	49.9	-4.2%	5.9	34.7x	2x	CITYBANK	17,615	1.1%	4.5x	0.8x	GP	263.2	261.6	18.0	91	23.93
ADVENT	24.5	-3.5%	37.6	22.9x	1.7x	ROBI	15,714	0.9%	NM	2.4x	ANWARGALV	234.0	234.0	1.0	71	16.50
NAVANAPHAR	75.6	-3.4%	30.6	20.1x	1.6x	OLYMPIC	14,699	0.9%	19.2x	2.5x	DOMINAGE	20.8	20.8	2.0	378	7.85
ADNTEL	110.6	-3.1%	23.4	37.2x	3.9x	ALARABANK	14,609	0.9%	14.6x	1.1x	EHL	83.0	83.0	2.0	84	6.97
ECABLES	189.3	-3.0%	5.8	NM	0.6x	BSRMLTD	14,417	0.9%	62.6x	0.7x	FORTUNE	83.2	68.2	2.0	91	6.79
MONOSPOOL	277.6	-3.0%	18.3	41.4x	6.0x	UPGDCL	13,547	0.8%	13.6x	3.8x	SUNLIFEINS	59.9	59.9	1.0	113	6.78
SAPORTL	29.1	-3.0%	34.5	20.3x	0.8x	SUMITPOWER	13,358	0.8%	10.0x	0.9x	BEXIMCO	104.1	104.1	8.0	61	6.36
GENEXIL	78.6	-3.0%	87.6	22.7x	4.3x	PRIMEBANK	13,324	0.8%	6.3x	0.7x	SEAPEARL	194.9	189.8	2.0	20	3.87
BDTHAIFOOD	48.5	-2.8%	22.5	NM	3.4x						BSCCL	212.7	199.8	5.0	19	3.83

\* 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 (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BEACONPHAR	262.0	262.0	31.3	120	3
GP	263.2	261.6	23.9	91	18
ANWARGALV	234.0	234.0	16.5	71	1
DOMINAGE	20.8	20.8	7.9	378	2
EHL	83.0	83.0	7.0	84	2
FORTUNE	83.2	68.2	6.8	91	2
SUNLIFEINS	59.9	59.9	6.8	113	1
BEXIMCO	104.1	104.1	6.4	61	8
SEAPPEARL	194.9	189.8	3.9	20	2
BSCCL	212.7	199.8	3.8	19	5
MALEKSPIN	25.0	24.4	3.6	146	5
AOL	32.9	32.9	2.4	73	1
COPPERTECH	36.9	36.9	2.2	60	1
SQURPHARMA	205.8	205.0	2.2	11	3
BATBC	479.8	479.8	2.0	4	3
RINGSHINE	9.0	8.9	1.8	200	2
IFIC	12.6	12.6	1.6	125	1
BDTHAIFOOD	51.0	50.1	1.5	30	2
EGEN	51.0	51.0	1.4	28	1
RENATA	1,143.0	1,141.8	1.3	1	2
NPOLYMER	50.0	50.0	1.1	22	1
MARICO	2,352.0	2,342.0	1.1		2
<b>Total</b>			<b>145.4</b>		<b>82</b>

**Important DSE News**
**APEXFOOT**

Syed Manzur Elahi, one of the Sponsor Directors of the Company, has further informed that he has completed his buying of 39,361 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 21.12.2022.

**AMBEEPHA**

Refer to their earlier news disseminated by DSE on 23.11.2022 regarding Dividend Declaration (Additional Information), the company has further informed that the decision regarding raising of paid-up capital through issuance of 20% stock dividend for the year ended June 30, 2022 has not been approved by Bangladesh Securities and Exchange Commission.

**SUMITPOWER**

The Company has informed that the Board of Directors has appointed Engr. Md. Mozammel Hossain as the Managing Director of the Company for a period of one year commencing from January 01, 2023.

**MONNOCERA**

Monno Welfare Foundation, one of the Corporate Directors of the Company, has further informed that it has completed its sale of 6,00,000 shares of the Company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 19.12.2022.

**SKICL**

Sena Kalyan Sangstha, one of the Sponsors of the Company, has further informed that it has completed its buying of 06 shares of the company at prevailing market price through Dhaka Stock Exchange as per declaration disseminated on 28.12.2022.

**HRTEX**

The Company has further informed that BSEC has accorded its consent for raising paid-up capital through issuance of 10% Stock Dividend for the year ended June 30, 2022. The company has also informed that Record date as of November 22, 2022 will remain unchanged.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Queen South Textile Mills Limited	-	6.0%	0.0%	Record Date	2-Jan-23
Desh Garmants Ltd.	-	10.0%	0.0%	Record Date	3-Jan-23

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