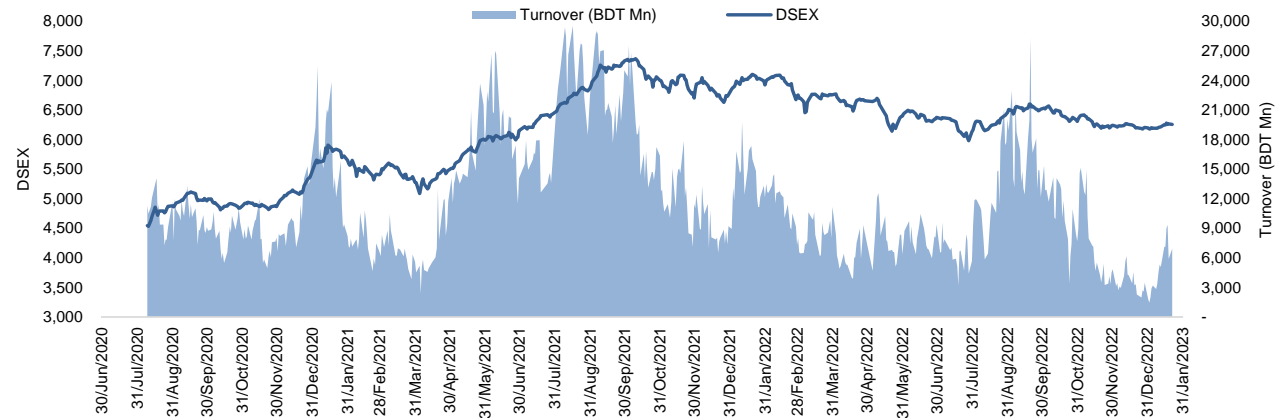


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.15%) lost 9.51 points and closed at 6,255.93. The blue-chip index DS30 (-0.19%), the Shariah-based index DSES (-0.52%), and the large-cap index CDSET (-0.29%) closed at 2,204.35, 1,360.67, and 1,215.93 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 0.06% followed by NBF1 (+0.05%), Telecommunication (0.00%). Pharmaceutical experienced the highest loss of 0.63% followed by Fuel & Power (-0.06%), Food & Allied (-0.06%), Engineering (-0.03%). Block trades contributed 8.4% of the overall market turnover. Genex Infosys Limited (-0.3%) was the most traded share with a turnover of BDT 670 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,255.93	6,265.44	-9.51	-0.15%	+0.8%
DS30	2,204.35	2,208.61	-4.26	-0.19%	+0.4%
DSES	1,360.67	1,367.73	-7.06	-0.52%	+0.1%
CDSET	1,215.93	1,219.49	-3.56	-0.29%	+0.1%

	Advanced	Declined	Unchanged	Total
All Category	54	129	186	369
A Category (Equity)	48	63	138	249
B Category (Equity)	6	51	39	96
N Category (Equity)	0	5	4	9
Z Category (Equity)	0	10	5	15
Mutual Funds	2	1	28	31
Corporate Bonds	1	0	2	3
Treasury Bonds	0	0	0	0

\* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,574,552	7,568,413	+0.1%
	Mn USD	71,408	71,350	
Turnover	Mn BDT	6,928	5,907	+17.3%
	Mn USD	65	56	
Volume	Mn Shares	122	100	+22.2%
	No. of Trade	184,082	125,622	+46.5%

\* Average Interbank Exchange Rate is BDT 106.08 as of Jan 19, 2023

Figure: Sectorial Turnover (BDT Mn)

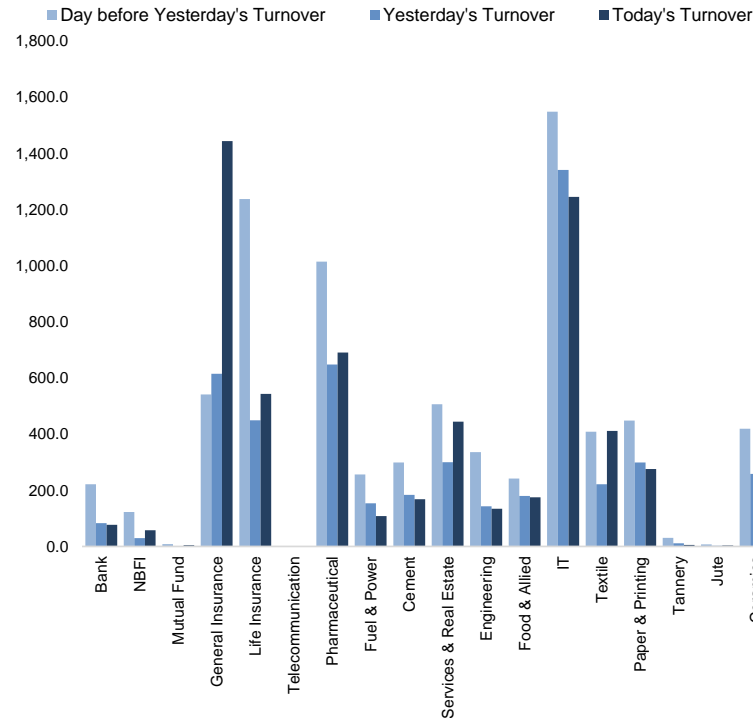
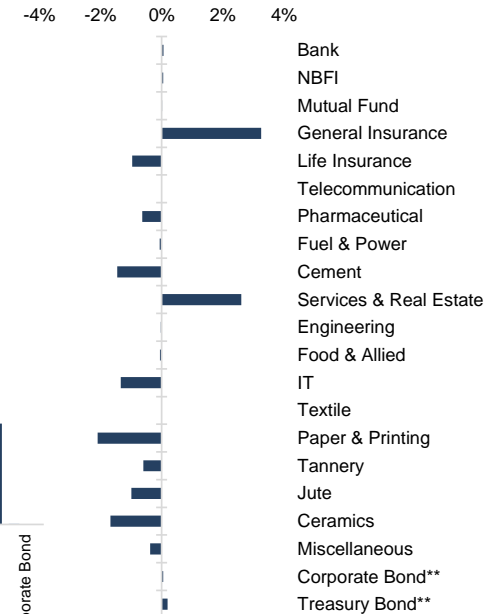


Figure: Sectorial Mcap Change



Market PE 17.2x

Market PB 1.5x

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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	1,434	1,433	+0.89	+0.06%	34	669,630	8.8%	77.0	1.2%	7.8x	0.7x	GP	386,996	8.6%	0.8	11.2x	9.1x
NBFI	1,928	1,928	+0.93	+0.05%	23	188,133	2.5%	57.7	0.9%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	851	851	+0.12	+0.01%	37	38,482	0.5%	4.5	0.1%	NM	0.8x	BATBC	280,098	6.2%	1.2	16.8x	6.7x
General Insurance	3,509	3,398	+110.58	+3.25%	42	102,410	1.4%	1,442.9	22.7%	17.2x	1.7x	SQURPHARMA	185,977	4.1%	0.9	10.0x	1.7x
Life Insurance	2,660	2,686	-25.98	-0.97%	14	74,601	1.0%	543.4	8.6%	NM	NM	ROBI	157,138	3.5%	0.1	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.7%	1.0	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.1	28.1x	4.6x
Pharmaceutical	3,749	3,773	-23.95	-0.63%	34	727,196	9.6%	690.6	10.9%	18.6x	2.4x	UPGDCL	135,475	3.0%	0.1	13.6x	3.8x
Fuel & Power	1,693	1,694	-1.01	-0.06%	23	446,295	5.9%	107.7	1.7%	14.4x	1.1x	BEXIMCO	101,302	2.3%	1.6	8.2x	1.2x
Cement	2,317	2,352	-34.24	-1.46%	7	111,299	1.5%	167.8	2.6%	33.4x	2.5x	BERGERPBL	80,396	1.8%	0.7	26.1x	7.0x
Services & Real Estat	2,013	1,961	+51.14	+2.61%	8	79,513	1.1%	444.1	7.0%	45.0x	1.0x	MARICO	76,277	1.7%	0.2	21.3x	44.9x
Engineering	4,491	4,492	-1.44	-0.03%	42	527,046	7.0%	134.4	2.1%	38.6x	1.8x	ICB	74,119	1.6%	0.7	68.1x	1.6x
Food & Allied	21,139	21,150	-11.69	-0.06%	21	376,658	5.0%	174.9	2.8%	21.4x	7.4x	BEACONPHAR	67,614	1.5%	57.2	83.2x	11.0x
IT	3,376	3,422	-45.63	-1.33%	11	44,019	0.6%	1,244.7	19.6%	31.4x	3.0x	BXPHERMA	65,578	1.5%	53.0	12.8x	1.6x
Textile	1,605	1,606	-0.35	-0.02%	58	168,795	2.2%	411.5	6.5%	30.7x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	10,707	10,936	-228.85	-2.09%	6	41,254	0.5%	275.7	4.3%	46.4x	2.1x	ISLAMIBANK	53,613	1.2%	2.2	10.9x	0.8x
Tannery	3,038	3,056	-18.34	-0.60%	6	32,087	0.4%	5.4	0.1%	39.0x	3.0x	DUTCHBANGL	43,554	1.0%	3.7	7.4x	1.1x
Jute	12,892	13,021	-128.75	-0.99%	3	3,154	0.0%	3.5	0.1%	NM	111.3x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	691	703	-11.77	-1.68%	5	31,952	0.4%	196.2	3.1%	33.6x	1.9x	POWERGRID	37,347	0.8%	0.4	38.5x	0.4x
Miscellaneous	4,112	4,127	-15.41	-0.37%	14	221,607	2.9%	359.4	5.7%	12.4x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.0x	0.9x
Corporate Bond**	88	88	+0.05	+0.05%	9	36,415	0.5%	0.5	0.0%	NM	NM	BSCCL	36,098	0.8%	0.1	14.9x	3.4x
Treasury Bond**	96	96	+0.19	+0.20%	252	3,071,118	40.6%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DHAKAINS	57.2	+10.0%	22.1	17.5x	1.7x
TAKAFULINS	47.3	+10.0%	16.6	27.3x	2.5x
SONARBAINS	53.1	+8.4%	46.4	27.1x	2.4x
PEOPLESINS	38.1	+7.3%	52.6	16.4x	1.2x
SEAPEARL	245.0	+7.3%	201.5	90.7x	18.8x
PIONEERINS	76.7	+7.3%	113.6	12.4x	1.7x
ASIAPACINS	49.0	+7.2%	26.0	20.9x	2x
UNITEDINS	45.0	+6.9%	4.8	52.9x	1.4x
NORTHRNINS	42.5	+6.8%	6.0	22.7x	2.0x
METROSPIN	52.4	+5.2%	253.4	53.5x	2.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
JHRML	85.4	-8.3%	164.5	25.6x	2.7x
ORIONINFU	341.8	-7.0%	89.2	NM	23x
NAVANAPHAR	79.6	-6.4%	82.3	21.2x	1.7x
SPCERAMICS	43.1	-6.1%	158.6	91.7x	1.4x
EHL	83.9	-5.9%	105.2	13.6x	1.1x
BPML	86.6	-5.1%	236.2	23.2x	1.1x
ORIONPHARM	85.2	-4.4%	167.1	21.1x	0.9x
RUPALILIFE	85.2	-4.3%	47.4	NM	NM
ADNTEL	119.1	-3.7%	55.5	40.1x	4.2x
AAMRATECH	41.2	-3.5%	60.7	26.4x	1.8x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	121,685	7.2%	10.0x	1.7x
BATBC	74,086	4.4%	16.8x	6.7x
BEXIMCO	70,355	4.2%	8.2x	1.2x
RENATA	68,196	4.0%	28.1x	4.6x
BEACONPHAR	47,330	2.8%	83.2x	11.0x
BXPHERMA	45,787	2.7%	12.8x	1.6x
GP	38,700	2.3%	11.2x	9.1x
BRACBANK	30,976	1.8%	10.9x	1.9x
LHBL	26,581	1.6%	18.4x	4.1x
ISLAMIBANK	24,083	1.4%	10.9x	0.8x
NBL	19,116	1.1%	NM	0.6x
PUBALIBANK	18,525	1.1%	5.5x	0.6x
CITYBANK	17,615	1.0%	4.5x	0.8x
SEAPEARL	15,730	0.9%	90.7x	18.8x
ROBI	15,714	0.9%	NM	2.4x
OLYMPIC	14,918	0.9%	19.5x	2.5x
ALARABANK	14,609	0.9%	14.6x	1.1x
BSRMLTD	14,417	0.9%	62.6x	0.7x
ORIONPHARM	13,561	0.8%	21.1x	0.9x
UPGDCL	13,547	0.8%	13.6x	3.8x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GENEXIL	102.1	-0.3%	670.0	30.1x	5.8x
BSC	129.6	-3.3%	285.6	9.0x	1.7x
METROSPIN	52.4	+5.2%	253.4	53.5x	2.5x
BPML	86.6	-5.1%	236.2	23.2x	1.1x
AAMRANET	61.5	-0.2%	204.7	26.9x	1.7x
SEAPEARL	245.0	+7.3%	201.5	90.7x	18.8x
LHBL	64.8	-2.1%	167.5	18.4x	4.1x
ORIONPHARM	85.2	-4.4%	167.1	21.1x	0.9x
JHRML	85.4	-8.3%	164.5	25.6x	2.7x
PROVATIINS	59.1	+0.3%	159.9	25.1x	3.0x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ISLAMIBANK	35.5	35.5	3.0	5,550	197.03
SEAPEARL	236.1	208.4	15.0	276	60.49
BEXIMCO	125.0	104.1	44.0	353	37.50
KDSALTD	77.0	70.6	8.0	485	37.27
METROSPIN	52.0	44.9	8.0	653	32.59
AOL	36.5	36.5	1.0	800	29.19
HRTEX	115.9	115.8	2.0	214	24.75
ADNTEL	128.8	127.9	3.0	180	23.05
ACFL	26.4	23.9	2.0	571	14.27
GP	267.5	265.0	18.0	41	10.88

\* 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
ISLAMIBANK	35.5	35.5	197.0	5,550	3
SEAPEARL	236.1	208.4	60.5	276	15
BEXIMCO	125.0	104.1	37.5	353	44
KDSALTD	77.0	70.6	37.3	485	8
METROSPIN	52.0	44.9	32.6	653	8
AOL	36.5	36.5	29.2	800	1
HRTEX	115.9	115.8	24.7	214	2
ADNTEL	128.8	127.9	23.1	180	3
ACFL	26.4	23.9	14.3	571	2
GP	267.5	265.0	10.9	41	18
SILCOPHL	21.1	21.1	10.6	500	3
RDFOOD	33.9	32.7	8.2	249	13
FORTUNE	83.2	68.2	8.1	108	4
SQURPHARMA	202.0	201.0	6.3	31	10
DOMINAGE	20.5	18.8	6.2	326	2
SILVAPHL	21.5	19.5	5.9	280	3
GSPFINANCE	27.3	27.3	5.5	201	2
GENEXIL	112.5	100.2	4.7	46	4
IPDC	63.0	51.9	4.5	81	5
BEACONPHAR	264.1	264.1	4.3	16	1
BSCCL	201.4	199.8	4.1	21	4
EHL	96.5	96.5	3.8	39	1
<b>Total</b>			<b>584.7</b>		<b>221</b>

#### Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		

#### Important DSE News

##### KAY&QUE

**(Q2 Un-audited):** EPS was Tk. 0.11 for October-December 2022 as against Tk. 0.11 for October-December 2021; EPS was Tk. 0.26 for July-December 2022 as against Tk. 0.16 for July-December 2021. NOCFPS was Tk. (1.21) for July-December 2022 as against Tk. 0.16 for July-December 2021. NAV per share was Tk. 74.17 as on December 31, 2022 and Tk. 75.64 as on June 30, 2022. The Company has also informed that due to insufficient collection against sales, NOCFPS has significantly decreased.

##### PHARMAID

**(Q2 Un-audited):** EPS was Tk. (0.76) for October-December 2022 as against Tk. 5.53 for October-December 2021; EPS was Tk. 1.23 for July-December 2022 as against Tk. 10.69 for July-December 2021. NOCFPS was Tk. 2.92 for July-December 2022 as against Tk. 14.56 for July-December 2021. NAV per share was Tk. 94.73 as on December 31, 2022 and Tk. 98.83 as on June 30, 2022.

##### KAY&QUE

Refer to their earlier news disseminated by DSE on 05.06.2019 regarding Sanction of the Scheme of Amalgamation by the Court, the company has further informed that the Hon'ble Appellate Division of Supreme Court of Bangladesh has reconfirmed the Scheme of Amalgamation of MultiSourcing Limited (The Transferor Company) with Kay & Que (Bangladesh) Limited (The Transferee Company) approved on October 17, 2018 by the Shareholders and Creditors in the respective Extra-Ordinary General Meeting (EGM) & the Creditors Meeting.

##### NBL

Refer to their earlier news disseminated by DSE on 29.05.2022 regarding Decision to issue Subordinated Bond, the Company has further informed that Bangladesh Securities and Exchange Commission has accorded its consent to the Company for raising of capital through issuance of non-convertible, unsecured, fully redeemable, floating rate subordinated bond of BDT 5,000.00 million through private placement. The consent has been accorded subject to compliance of relevant laws and regulatory requirements. The purpose of the issue is to strengthen the capital base of the Company.

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