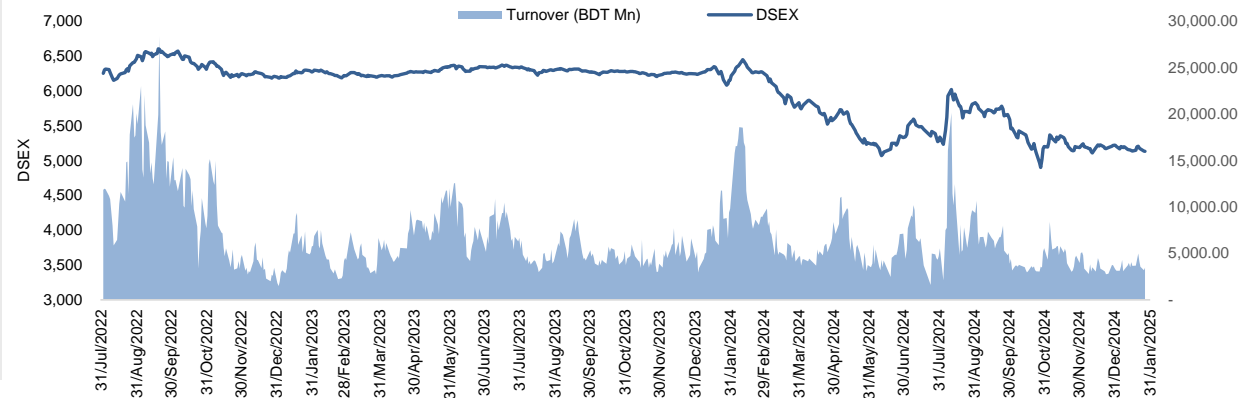


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.05%) lost 2.33 points and closed at 5,130.06. The blue-chip index DS30 (-0.05%), the Shariah-based index DSES (-0.06%), and the large-cap index CDSET (-0.03%) closed at 1,894.80, 1,150.18, and 1,044.68 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.65%, followed by Telecommunication (+0.42%), NBF1 (+0.10%), Food & Allied (+0.05%), Fuel & Power (-0.11%), Bank (-0.16%), and Pharmaceutical (-0.31%), respectively. Block trades contributed 10.2% of the overall market turnover. Malek Spinning Mills Ltd. (+3.4%) was the most traded share with a turnover of BDT 112 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,130.06	5,132.39	-2.33	-0.05%	-1.7%
DS30	1,894.80	1,895.76	-0.95	-0.05%	-2.3%
DSES	1,150.18	1,150.92	-0.75	-0.06%	-1.6%
CDSET	1,044.68	1,045.04	-0.36	-0.03%	-2.0%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	140	178	81	399
<b>A Category (Equity)</b>	79	104	37	220
<b>B Category (Equity)</b>	25	49	16	90
<b>N Category (Equity)</b>	4	0	0	4
<b>Z Category (Equity)</b>	32	25	28	85
<b>Mutual Funds</b>	6	16	15	37
<b>Corporate Bonds</b>	0	0	2	2
<b>Treasury Bonds</b>	1	3	0	4

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	6,587,169	6,584,887	+0.0%
Mn USD	53,993	53,974	
<b>Turnover</b>			
Mn BDT	3,440	3,185	+8.0%
Mn USD	28	26	
<b>Volume</b>			
Mn Shares	122	122	+0.4%
<b>No. of Trade</b>	118,915	120,079	-1.0%

\* Average Interbank Exchange Rate is BDT 122.00 as of Jan 27, 2025

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Figure: Sectorial Turnover (BDT Mn)

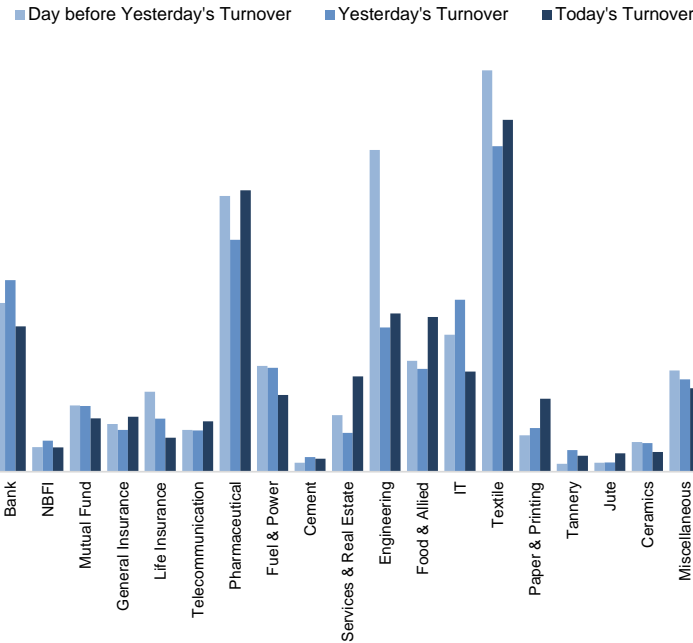
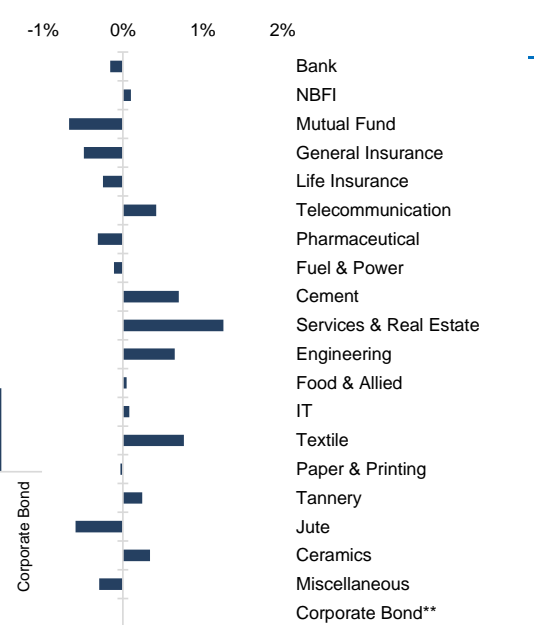


Figure: Sectorial Mcap Change



Market PE 14.8x  
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	1,407	1,409	-2.23	-0.16%	36	665,833	10.1%	248.4	8.0%	8.6x	0.7x	GP	446,679	12.6%	46.6	12.6x	7.7x
NBFI	1,093	1,092	+1.09	+0.10%	23	104,142	1.6%	41.4	1.3%	NM	NM	SQURPHARMA	191,828	5.4%	45.5	9.1x	1.4x
Mutual Fund	569	572	-3.86	-0.68%	37	26,132	0.4%	91.2	3.0%	NM	0.5x	BATBC	186,354	5.3%	17.5	10.6x	3.0x
General Insurance	2,632	2,645	-12.91	-0.49%	43	75,135	1.1%	94.0	3.0%	13.6x	1.1x	WALTONHIL	152,585	4.3%	4.0	11.7x	1.3x
Life Insurance	1,685	1,689	-4.21	-0.25%	15	44,805	0.7%	58.0	1.9%	NM	NM	ROBI	146,138	4.1%	36.3	26.6x	2.2x
Telecommunication	5,250	5,228	+21.78	+0.42%	3	615,561	9.3%	86.0	2.8%	14.6x	4.4x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,864	2,873	-9.04	-0.31%	34	542,869	8.2%	480.7	15.6%	13.9x	1.5x	BRACBANK	88,486	2.5%	35.8	8.0x	1.2x
Fuel & Power	1,063	1,065	-1.17	-0.11%	23	281,705	4.3%	131.1	4.2%	18.2x	0.6x	BERGERPBL	83,777	2.4%	0.9	24.4x	5.8x
Cement	1,857	1,844	+12.93	+0.70%	7	88,488	1.3%	22.3	0.7%	14.9x	1.9x	MARICO	73,115	2.1%	2.3	13.8x	9.6x
Services & Real Estate	1,005	993	+12.50	+1.26%	9	55,272	0.8%	162.8	5.3%	18.2x	0.4x	ISLAMIBANK	72,450	2.0%	10.9	15.5x	1.0x
Engineering	2,544	2,527	+16.46	+0.65%	42	286,966	4.4%	270.5	8.8%	12.5x	0.9x	RENATA	61,271	1.7%	12.4	20.7x	1.8x
Food & Allied	16,368	16,360	+7.80	+0.05%	21	299,485	4.5%	264.6	8.6%	16.2x	4.2x	LHB	57,720	1.6%	5.1	14.3x	2.8x
IT	2,086	2,084	+1.68	+0.08%	11	27,511	0.4%	171.2	5.5%	20.2x	1.7x	UNILEVERCL	48,716	1.4%	0.4	66.3x	20.7x
Textile	1,134	1,126	+8.60	+0.76%	58	118,110	1.8%	601.0	19.5%	NM	0.8x	ICB	47,699	1.3%	9.3	24.5x	1.1x
Paper & Printing	4,053	4,054	-1.23	-0.03%	6	18,309	0.3%	124.9	4.0%	NM	0.8x	DUTCHBANGL	44,380	1.3%	2.4	7.1x	0.9x
Tannery	1,996	1,991	+4.83	+0.24%	6	22,243	0.3%	27.2	0.9%	66.4x	1.6x	BXPHERMA	33,681	1.0%	9.4	5.6x	0.7x
Jute	13,393	13,474	-80.12	-0.59%	3	2,948	0.0%	31.6	1.0%	NM	NM	PUBALIBANK	33,548	0.9%	1.3	3.5x	0.6x
Ceramics	365	364	+1.23	+0.34%	5	16,370	0.2%	33.7	1.1%	NM	1.0x	EBL	32,867	0.9%	2.4	5.0x	0.8x
Miscellaneous	4,300	4,313	-12.85	-0.30%	15	233,510	3.5%	142.9	4.6%	42.1x	1.8x	CITYBANK	30,579	0.9%	23.2	4.3x	0.8x
Corporate Bond**	15,345	15,345	-	-	16	33,608	0.5%	0.1	0.0%	NM	NM	OLYMPIC	30,491	0.9%	2.9	16.6x	2.7x
Treasury Bond**	729	711	+18.16	+2.56%	233	3,027,686	46.0%	5.0	0.2%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SHARPIND	27.9	+9.8%	49.3	77.5x	2.7x
KPPL	23.8	+9.7%	72.2	NM	NM
DELTASPINN	5.0	+6.4%	5.7	NM	0.4x
CENTRALPHL	12.5	+5.9%	62.4	NM	1.8x
PRIMETEX	14.4	+5.9%	4.9	NM	0.2x
PREMIERCEM	51.3	+5.34%	7.8	7.7x	0.8x
ASIATICLAB	39.6	+5.3%	58.3	16.8x	1x
ALLTEX	14.8	+5.0%	3.7	74.0x	0.7x
RENWICKJA	610.3	+4.7%	0.0	NM	NM
JUTESPINN	249.2	+4.5%	0.2	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	108,958	7.7%	9.1x	1.4x
ISLAMIBANK	74,730	5.3%	15.5x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.6x	3.0x
WALTONHIL	46,773	3.3%	11.7x	1.3x
BRACBANK	46,489	3.3%	8.0x	1.2x
GP	44,708	3.2%	12.6x	7.7x
RENATA	32,968	2.3%	20.7x	1.8x
BXPHERMA	23,409	1.7%	5.6x	0.7x
PUBALIBANK	22,905	1.6%	3.5x	0.6x
CITYBANK	21,020	1.5%	4.3x	0.8x
LHB	20,953	1.5%	14.3x	2.8x
OLYMPIC	20,496	1.5%	16.6x	2.7x
ALARABANK	18,282	1.3%	12.3x	0.9x
BEACONPHAR	17,838	1.3%	57.7x	4.6x
PRIMEBANK	16,142	1.1%	4.3x	0.7x
ROBI	14,876	1.1%	26.6x	2.2x
UTTARABANK	13,699	1.0%	7.5x	0.8x
NBL	13,055	0.9%	NM	2.5x
BSRMLTD	12,852	0.9%	5.1x	0.5x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MALEKSPIN	27.1	+3.4%	111.5	3.5x	0.5x
BEACHHATCH	91.9	+0.4%	100.1	37.7x	6.9x
DSSL	12.6	-1.6%	97.0	40.6x	0.7x
KPPL	23.8	+9.7%	72.2	NM	NM
ADNTEL	108.4	-0.6%	71.9	20.0x	3.4x
ORIONINFU	363.5	-3.0%	65.4	NM	22.7x
CENTRALPHL	12.5	+5.9%	62.4	NM	1.8x
LOVELLO	84.8	+0.2%	59.7	46.2x	6.5x
ASIATICLAB	39.6	+5.3%	58.3	16.8x	0.7x
EHL	67.7	+2.3%	55.8	9.7x	0.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EIL	53.1	-6.0%	31.9	37.1x	2.8x
BDTHAIFOOD	13.9	-5.4%	7.8	NM	1x
PRIMEFIN	4.0	-4.8%	0.6	NM	0.4x
OIMEX	26.2	-4.7%	48.1	26.4x	7.6x
ARGONDENIM	16.6	-3.5%	5.4	18.2x	0.7x
HRTEX	30.6	-3.5%	10.8	NM	1.6x
RENATA	534.2	-3.4%	12.4	20.7x	1.8x
MITHUNKNIT	16.9	-3.4%	3.2	NM	5.3x
TUNGHAI	2.9	-3.3%	0.1	NM	NM
BARKAPOWER	9.0	-3.2%	2.8	8.8x	0.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ACI	155.8	155.8	5.0	1,600	249.28
RENATA	540.0	540.0	1.0	35	18.90
EIL	58.0	58.0	3.0	215	12.49
LOVELLO	82.0	81.5	4.0	125	10.24
RUPALILIFE	101.0	88.0	5.0	96	9.26
EHL	69.0	69.0	1.0	107	7.38
ORIONINFU	407.3	374.9	3.0	16	6.21
POWERGRID	33.6	33.6	2.0	97	3.27
GEMINISEA	155.5	155.3	2.0	19	2.95
SEMILLECMF	6.6	6.6	1.0	409	2.70

\* 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
ACI	155.8	155.8	249.3	1,600	5
RENATA	540.0	540.0	18.9	35	1
EIL	58.0	58.0	12.5	215	3
LOVELLO	82.0	81.5	10.2	125	4
RUPALILIFE	101.0	88.0	9.3	96	5
EHL	69.0	69.0	7.4	107	1
ORIONINFU	407.3	374.9	6.2	16	3
POWERGRID	33.6	33.6	3.3	97	2
GEMINISEA	155.5	155.3	3.0	19	2
SEMLLECMF	6.6	6.6	2.7	409	1
AMANFEED	28.4	28.3	2.6	92	2
AIL	95.0	92.0	2.4	26	2
DGIC	22.1	22.1	2.2	101	1
BSC	94.8	94.8	2.1	22	1
MIDLANDBNK	27.4	27.4	1.8	67	1
TILIL	36.6	36.0	1.7	48	2
DBH1STMF	3.9	3.9	1.3	341	1
LHB	54.4	54.4	1.3	23	1
RDFOOD	22.3	22.3	1.1	50	1
CNATEX	3.8	3.8	1.0	276	1
BSRMSTEEL	56.6	56.6	1.0	18	1
TECHNODRUG	36.4	31.4	1.0	30	2
<b>Total</b>			<b>351.9</b>		<b>58</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
KAY&QUE		2.0%	0.0%	Record Date	2-Feb-25
POWERGRID		0.0%	0.0%	Record Date	6-Feb-25

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

**(Q2 Un-audited):** EPS was Tk. 2.03 for October-December 2024 as against Tk. 1.53 for October-December 2023; EPS was Tk. 3.83 for July-December 2024 as against Tk. 2.95 for July-December 2023. NOCFPS was Tk. 71.34 for July-December 2024 as against Tk. 82.92 for July-December 2023. NAV per share was Tk. 431.89 as on December 31, 2024 and Tk. 431.24 as on June 30, 2024.

**MONNOFABR**

**(Q2 Un-audited):** EPS was Tk. 0.04 for October-December 2024 as against Tk. 0.04 for October-December 2023; EPS was Tk. 0.07 for July-December 2024 as against Tk. 0.07 for July-December 2023. NOCFPS was Tk. 0.03 for July-December 2024 as against Tk. 0.12 for July-December 2023. NAV per share was Tk. 25.42 as on December 31, 2024 and Tk. 25.41 as on June 30, 2024.

**EHL**

**(Q2 Un-audited):** EPS was Tk. 2.46 for October-December 2024 as against Tk. 2.07 for October-December 2023; EPS was Tk. 4.17 for July-December 2024 as against Tk. 3.25 for July-December 2023. NOCFPS was Tk. 2.73 for July-December 2024 as against Tk. (4.29) for July-December 2023. NAV per share was Tk. 85.89 as on December 31, 2024 and Tk. 83.62 as on June 30, 2024.

**BERGERPBL**

**(Q3 un-audited):** Consolidated EPS was Tk. 20.32 for October-December 2024 as against Tk. 18.30 for October-December 2023; Consolidated EPS was Tk. 53.26 for April-December 2024 as against Tk. 49.38 for April-December 2023. Consolidated NOCFPS was Tk. 18.46 for April-December 2024 as against Tk. 104.99 for April-December 2023. Consolidated NAV per share was Tk. 312.79 as on December 31, 2024 and Tk. 309.53 as on March 31, 2024.

**RELIANCE1**

**(Q2 Un-audited):** EPU was Tk. 0.09 for October-December 2024 as against Tk. 0.13 for October-December 2023; EPU was Tk. 0.23 for July-December 2024 as against Tk. 0.14 for July-December 2023. NOCFPU was Tk. 0.37 for July-December 2024 as against Tk. 0.23 for July-December 2023. NAV per unit at market price was Tk. 11.01 as on December 31, 2024 and Tk. 11.18 as on June 30, 2024. NAV per unit at cost price was Tk. 10.87 as on December 31, 2024 and Tk. 11.01 as on June 30, 2024.

**NCCBANK**

Mr. Syed Asif Nizamuddin, one of the Directors of the Company, has informed that he will receive a total of 10,16,613 shares from his father, Late S. M. Abu Mohsin, by way of nomination.

**DACCADYE**

Refer to their earlier news disseminated by DSE on 30.08.2023 regarding temporary closure of gas connection. The Titas Gas authorities disconnected the gas supply to the factory of the company on July 26, 2023. As a result, production in the dyeing and printing department was completely closed. In line with this, the company has now informed that the gas connection has not yet been restored.

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