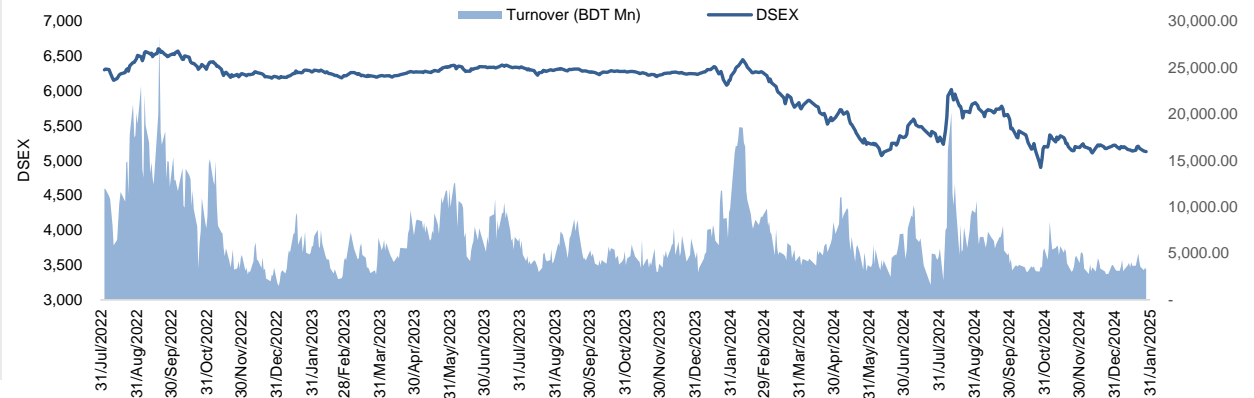


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.07%) lost 3.64 points and closed at 5,126.42. The blue-chip index DS30 (+0.11%), the Shariah-based index DSES (-0.41%), and the large-cap index CDSET (-0.08%) closed at 1,896.97, 1,145.48, and 1,043.80 points, respectively. Most of the large-cap sectors posted negative performance today. Engineering experienced the highest loss of 0.88% followed by Bank (-0.24%), Fuel & Power (-0.17%), NBF (0.13%), Pharmaceutical (-0.06%), Food & Allied (+0.08%), and Telecommunication (+0.26%), respectively. Block trades contributed 1.4% of the overall market turnover. BRAC Bank Ltd. (+1.2%) was the most traded share with a turnover of BDT 138 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,126.42	5,130.06	-3.64	-0.07%	-1.7%
DS30	1,896.97	1,894.80	+2.17	+0.11%	-2.2%
DSES	1,145.48	1,150.18	-4.69	-0.41%	-2.0%
CDSET	1,043.80	1,044.68	-0.88	-0.08%	-2.1%

	Advanced	Declined	Unchanged	Total
All Category	173	152	77	402
A Category (Equity)	91	87	44	222
B Category (Equity)	33	40	18	91
N Category (Equity)	1	3	0	4
Z Category (Equity)	48	22	15	85
Mutual Funds	9	9	18	36
Corporate Bonds	2	0	0	2
Treasury Bonds	0	6	0	6

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,622,205	6,587,169	+0.5%
Mn USD	54,280	53,993	
Turnover			
Mn BDT	3,283	3,440	-4.6%
Mn USD	27	28	
Volume			
Mn Shares	125	122	+2.1%
No. of Trade	123,320	118,915	+3.7%

* Based on Traded Scrips

Fahim Hassan Research Analyst (891) 1709636546 fahim.hassan@bracepl.com	Md Istiaz Uddin Research Associate (891) 1708805202 mistiaz.uddin@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

Day before Yesterday's Turnover Yesterday's Turnover Today's Turnover

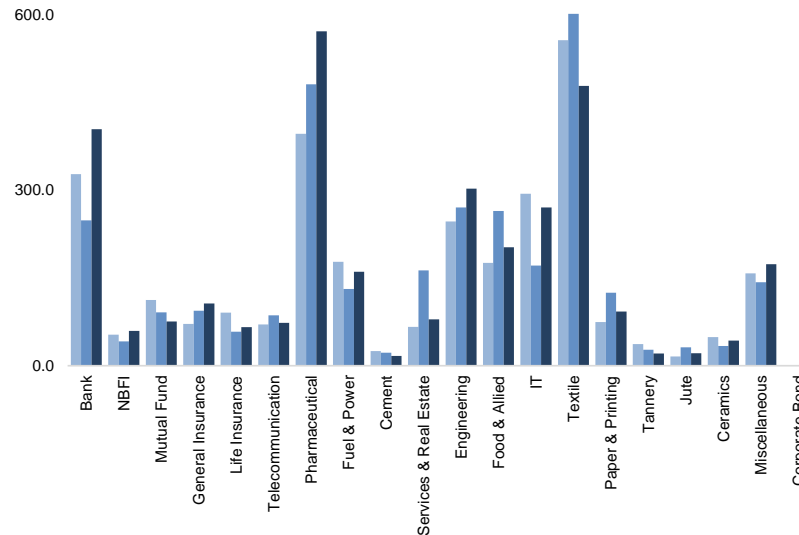
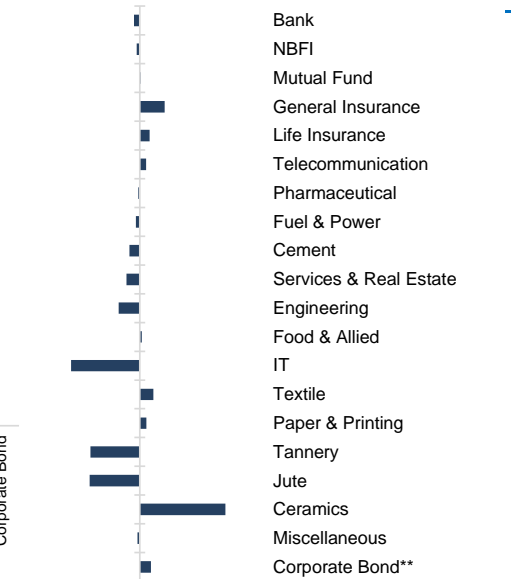


Figure: Sectorial Mcap Change

-5% 0% 5%



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	1,404	1,407	-3.45	-0.24%	36	664,202	10.1%	404.2	12.5%	8.6x	0.7x	GP	447,895	12.7%	37.6	12.6x	7.8x
NBFI	1,091	1,093	-1.45	-0.13%	23	104,003	1.6%	59.3	1.8%	NM	NM	SQURPHARMA	192,449	5.4%	38.9	9.2x	1.4x
Mutual Fund	569	569	+0.14	+0.03%	37	26,139	0.4%	75.3	2.3%	NM	0.5x	BATBC	186,246	5.3%	19.3	10.6x	3.0x
General Insurance	2,659	2,632	+27.32	+1.04%	43	75,915	1.2%	106.1	3.3%	13.7x	1.2x	WALTONHIL	150,677	4.3%	3.2	11.4x	1.4x
Life Insurance	1,692	1,685	+6.98	+0.41%	15	44,991	0.7%	66.1	2.0%	NM	NM	ROBI	146,662	4.1%	33.0	26.7x	2.2x
Telecommunication	5,263	5,250	+13.87	+0.26%	3	617,188	9.4%	73.2	2.3%	14.6x	4.4x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,862	2,864	-1.63	-0.06%	34	542,561	8.2%	571.1	17.6%	13.8x	1.5x	BRACBANK	89,547	2.5%	137.9	8.1x	1.2x
Fuel & Power	1,062	1,063	-1.78	-0.17%	23	281,232	4.3%	160.4	5.0%	17.6x	0.6x	BERGERPBL	84,055	2.4%	0.3	24.5x	5.8x
Cement	1,849	1,857	-7.97	-0.43%	7	88,108	1.3%	16.8	0.5%	14.8x	1.9x	MARICO	73,137	2.1%	31.3	13.1x	9.6x
Services & Real Estate	999	1,005	-5.58	-0.55%	9	54,966	0.8%	79.3	2.5%	18.1x	0.4x	UPGDCL	70,955	2.0%	3.1	6.8x	1.8x
Engineering	2,522	2,544	-22.33	-0.88%	42	284,447	4.3%	302.4	9.3%	12.4x	0.9x	RENATA	60,342	1.7%	16.1	20.4x	1.8x
Food & Allied	16,381	16,368	+13.69	+0.08%	21	299,735	4.6%	202.5	6.3%	16.3x	4.2x	LHB	57,488	1.6%	7.6	14.2x	2.8x
IT	2,026	2,086	-59.77	-2.87%	11	26,722	0.4%	270.3	8.4%	19.7x	1.7x	UNILEVERCL	48,986	1.4%	0.1	66.7x	20.8x
Textile	1,141	1,134	+6.47	+0.57%	58	118,784	1.8%	478.2	14.8%	NM	0.8x	ICB	47,439	1.3%	12.3	24.4x	1.1x
Paper & Printing	4,064	4,053	+10.96	+0.27%	6	18,358	0.3%	92.5	2.9%	NM	0.8x	DUTCHBANGL	44,380	1.3%	1.7	7.1x	0.9x
Tannery	1,955	1,996	-41.20	-2.06%	6	21,784	0.3%	20.7	0.6%	65.1x	1.6x	BXPBARMA	34,172	1.0%	12.6	5.7x	0.7x
Jute	13,113	13,393	-280.55	-2.09%	3	2,886	0.0%	21.5	0.7%	NM	NM	PUBALIBANK	33,548	0.9%	9.1	3.5x	0.6x
Ceramics	378	365	+13.06	+3.58%	5	16,956	0.3%	42.8	1.3%	NM	1.0x	EBL	32,867	0.9%	2.8	5.0x	0.8x
Miscellaneous	4,296	4,300	-4.35	-0.10%	15	233,274	3.5%	173.3	5.4%	42.0x	1.8x	OLYMPIC	30,791	0.9%	5.5	16.8x	2.7x
Corporate Bond**	15,417	15,345	+72.14	+0.47%	16	33,766	0.5%	0.3	0.0%	NM	NM	CITYBANK	30,713	0.9%	42.9	4.3x	0.8x
Treasury Bond**	748	729	+19.38	+2.66%	233	3,030,627	46.0%	19.5	0.6%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
TALLUSPIN	5.5	+10.0%	1.4	NM	0.4x
DELTASPINN	5.5	+10.0%	3.3	NM	0.4x
KPCL	13.3	+9.9%	4.8	NM	0.7x
MAKSONSPIN	7.0	+9.4%	10.7	NM	0.7x
REGENTTEX	4.0	+8.1%	0.6	NM	0.2x
CNATEX	4.5	+7.14%	11.3	NM	NM
GENNEXT	3.1	+6.9%	1.8	NM	0x
OIMEX	28.0	+6.9%	42.8	28.2x	8.1x
CLICL	36.6	+6.4%	7.5	NM	NM
RENWICKJA	646.7	+6.0%	0.0	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	108,958	7.7%	9.2x	1.4x
ISLAMIBANK	74,730	5.3%	14.9x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.6x	3.0x
WALTONHIL	46,773	3.3%	11.4x	1.4x
BRACBANK	46,489	3.3%	8.1x	1.2x
GP	44,708	3.2%	12.6x	7.8x
RENATA	32,968	2.3%	20.4x	1.8x
BXPBARMA	23,409	1.7%	5.7x	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%	14.2x	2.8x
OLYMPIC	20,496	1.5%	16.8x	2.7x
ALARABANK	18,282	1.3%	12.1x	0.9x
BEACONPHAR	17,838	1.3%	57.4x	4.6x
PRIMEBANK	16,142	1.1%	4.4x	0.7x
ROBI	14,876	1.1%	26.7x	2.2x
UTTARABANK	13,699	1.0%	7.6x	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
BRACBANK	50.6	+1.2%	137.9	8.1x	1.2x
ADNTEL	97.8	-9.8%	127.2	18.1x	3.0x
ORIONINFU	364.0	+0.1%	101.6	NM	22.8x
AGNISYSL	26.8	+3.5%	87.4	22.5x	1.6x
ASIATICLAB	39.0	-1.5%	75.4	16.6x	0.7x
DSSL	12.5	-0.8%	70.0	40.3x	0.7x
DOMINAGE	12.6	-	69.5	NM	0.7x
MALEKSPIN	26.6	-1.8%	67.4	3.5x	0.5x
KPPL	24.8	+4.2%	61.8	NM	NM
LOVELLO	84.1	-0.8%	54.6	45.8x	6.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ADNTEL	97.8	-9.8%	127.2	18.1x	3.0x
BAYLEASING	6.1	-6.2%	3.5	NM	2x
CENTRALPHL	11.8	-5.6%	40.9	NM	1.7x
LIBRAINFU	820.3	-5.4%	22.0	NM	1.0x
MITHUNKNIT	16.0	-5.3%	3.4	NM	5.0x
SINGERBD	101.4	-5.1%	3.1	NM	3.9x
BDTHAIFOOD	13.2	-5.0%	13.6	NM	0.9x
MIRACLEIND	29.2	-4.6%	9.9	NM	2.3x
PRIMETEX	13.8	-4.2%	0.3	NM	0.2x
ISLAMIBANK	43.3	-3.8%	31.1	14.9x	1.0x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
LOVELLO	86.7	83.0	2.0	148	12.31
ADNTEL	106.9	102.0	4.0	46	4.81
AIL	92.0	92.0	1.0	49	4.51
SEMILLECMF	6.7	6.7	1.0	577	3.87
SOUTHEASTB	8.7	8.7	1.0	400	3.48
BBSCABLES	17.0	17.0	1.0	200	3.40
BEXIMCO	99.1	99.1	6.0	31	3.08
LHB	54.6	54.6	1.0	41	2.24
RELIANCE1	21.5	21.5	1.0	100	2.15
EIL	56.0	56.0	1.0	36	1.99

* 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
LOVELLO	86.7	83.0	12.3	148	2
ADNTEL	106.9	102.0	4.8	46	4
AIL	92.0	92.0	4.5	49	1
SEMILLECMF	6.7	6.7	3.9	577	1
SOUTHEASTB	8.7	8.7	3.5	400	1
BBSCABLES	17.0	17.0	3.4	200	1
BEXIMCO	99.1	99.1	3.1	31	6
LHB	54.6	54.6	2.2	41	1
RELIANCE1	21.5	21.5	2.2	100	1
EIL	56.0	56.0	2.0	36	1
BEACHHATCH	87.0	84.0	1.3	16	2
ICBSONALI1	7.2	7.2	1.0	137	1
POPULARLIF	50.0	50.0	0.8	15	1
BXPHARMA	68.5	68.5	0.6	8	1
LRBDL	14.5	14.5	0.6	39	1
GP	301.9	301.9	0.5	2	1
ORIONPHARM	35.7	35.7	0.5	15	1
Total			47.1		27

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
RAKCERAMIC		0.0%	10.0%	Record Date	17-Feb-25
SINGERBD		0.0%	10.0%	Record Date	18-Feb-25
MARICO		0.0%	440.0%	Record Date	23-Feb-25

Important DSE News
SINGERBD

The Board of Directors has recommended 10% cash dividend for the year ended December 31, 2024. Date of AGM: 22.04.2025, Time: 2:30 PM, Venue: Digital Platform, Record Date: 18.02.2025. The Company has also reported EPS of Tk. (4.91), NAV per share of Tk. 25.81 and NOCFPS of Tk. (7.96) for the year ended December 31, 2024 as against Tk. 5.24, Tk. 34.03 and Tk. 22.76 respectively for the year ended December 31, 2023.

RAKCERAMIC

The Board of Directors has recommended 10% Cash Dividend for the year ended December 31, 2024. Date of AGM: 22.03.2025. Venue: Digital Platform (Necessary link will be circulated with AGM Notice). Record date: 17.02.2025. The Company has also reported consolidated EPS of Tk. (0.06), consolidated NAV per share of Tk. 17.23 and consolidated NOCFPS of Tk. 0.49 for the year ended December 31, 2024 as against Tk. 1.44, Tk. 18.29 and Tk. 0.75 respectively for the year ended December 31, 2023.

NAHEEACP

(Q2 Un-audited): EPS was Tk. 0.12 for October-December 2024 as against Tk. 0.22 for October-December 2023; EPS was Tk. 0.28 for July-December 2024 as against Tk. 0.71 for July-December 2023. NOCFPS was Tk. (0.53) for July-December 2024 as against Tk. 0.39 for July-December 2023. NAV per share was Tk. 19.37 as on December 31, 2024 and Tk. 19.48 as on June 30, 2024.

AMCL(PRAN)

(Q2 Un-audited): EPS was Tk. 1.69 for October-December 2024 as against Tk. 1.73 for October-December 2023; EPS was Tk. 3.54 for July-December 2024 as against Tk. 3.39 for July-December 2023. NOCFPS was Tk. (22.93) for July-December 2024 as against Tk. 14.18 for July-December 2023. NAV per share was Tk. 91.24 as on December 31, 2024 and Tk. 90.90 as on June 30, 2024.

ZEALBANGLA

(Q2 Un-audited): EPS was Tk. (16.88) for October-December 2024 as against Tk. (16.99) for October-December 2023; EPS was Tk. (36.95) for July-December 2024 as against Tk. (36.71) for July-December 2023. NOCFPS was Tk. (48.77) for July-December 2024 as against Tk. (38.55) for July-December 2023. NAV per share was Tk. (1098.81) as on December 31, 2024 and Tk. (1063.39) as on June 30, 2024.

INDEXAGRO

(Q2 Un-audited): EPS was Tk. 1.06 for October-December 2024 as against Tk. 1.04 for October-December 2023; EPS was Tk. 2.07 for July-December 2024 as against Tk. 2.06 for July-December 2023. NOCFPS was Tk. (0.53) for July-December 2024 as against Tk. 16.87 for July-December 2023. NAV per share was Tk. 82.28 as on December 31, 2024 and Tk. 82.14 as on June 30, 2024.

RANFOUNDRY

(Q2 Un-audited): EPS was Tk. 1.02 for October-December 2024 as against Tk. 1.01 for October-December 2023; EPS was Tk. 2.19 for July-December 2024 as against Tk. 2.17 for July-December 2023. NOCFPS was Tk. 0.18 for July-December 2024 as against Tk. 0.67 for July-December 2023. NAV per share was Tk. 33.43 as on December 31, 2024 and Tk. 33.54 as on June 30, 2024.

SINOBANGLA

(Q2 Un-audited): EPS was Tk. 0.21 for October-December 2024 as against Tk. 0.14 (restated) for October-December 2023; EPS was Tk. 0.48 for July-December 2024 as against Tk. 0.38 (restated) for July-December 2023. NOCFPS was Tk. 1.93 for July-December 2024 as against Tk. 7.66 for July-December 2023. NAV per share was Tk. 26.58 as on December 31, 2024 and Tk. 26.12 as on June 30, 2024. The significant deviation in NOCFPS is due to right share issue.

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PENINSULA

(Q2 Un-audited): EPS was Tk. (0.08) for October-December 2024 as against Tk. (0.01) for October-December 2023; EPS was Tk. (0.39) for July-December 2024 as against Tk. (0.11) for July-December 2023. NOCFPS was Tk. 0.12 for July-December 2024 as against Tk. (0.30) for July-December 2023. NAV per share was Tk. 27.88 as on December 31, 2024 and Tk. 27.84 as on June 30, 2024.

WALTONHIL

(Q2 Un-audited): EPS was Tk. 5.13 for October-December 2024 as against Tk. 4.56 for October-December 2023; EPS was Tk. 10.05 for July-December 2024 as against Tk. 11.24 for July-December 2023. NOCFPS was Tk. 6.93 for July-December 2024 as against Tk. 27.16 for July-December 2023. NAV per share was Tk. 365.47 (with revaluation) as on December 31, 2024 and Tk. 379.30 as on June 30, 2024. NAV per share was Tk. 264.07 (without revaluation) as on December 31, 2024 and Tk. 277.86 as on June 30, 2024.

AMANFEED

(Q2 Un-audited): EPS was Tk. 0.21 for October-December 2024 as against Tk. 0.15 for October-December 2023; EPS was Tk. 0.53 for July-December 2024 as against Tk. 0.50 for July-December 2023. NOCFPS was Tk. (0.68) for July-December 2024 as against Tk. 0.10 for July-December 2023. NAV per share was Tk. 28.33 as on December 31, 2024 and Tk. 28.17 as on June 30, 2024.

PADMAOIL

(Q2 Un-audited): EPS was Tk. 12.73 for October-December 2024 as against Tk. 7.29 for October-December 2023; EPS was Tk. 25.40 for July-December 2024 as against Tk. 16.53 for July-December 2023. NOCFPS was Tk. (20.36) for July-December 2024 as against Tk. (73.84) for July-December 2023. NAV per share was Tk. 256.95 as on December 31, 2024 and Tk. 231.56 as on June 30, 2024.

MARICO

The Board of Directors has declared interim cash dividend of 440% i.e. BDT 44.00 per share on face value of BDT 10.00 based on the Audited Financial Statements as at and for the period ended December 31, 2024 to those whose names will appear in the Register of Members of the Company or in the Depository Register as Shareholders as on record date. Record Date: 23.02.2025.

(Q3 Audited): EPS was Tk. 44.34 for October-December 2024 as against Tk. 34.93 for October-December 2023; EPS was Tk. 145.65 for April-December 2024 as against Tk. 114.22 for April-December 2023. NOCFPS was Tk. 88.35 for April-December 2024 as against Tk. 143.15 for April-December 2023. NAV per share was Tk. 241.29 as on December 31, 2024 and Tk. 228.07 as on December 31, 2023.

SPCL

(Q2 Un-audited): Consolidated EPS was Tk. 1.10 for October-December 2024 as against Tk. 1.14 for October-December 2023; Consolidated EPS was Tk. 1.46 for July-December 2024 as against Tk. 3.38 for July-December 2023. Consolidated NOCFPS was Tk. (1.10) for July-December 2024 as against Tk. 4.72 for July-December 2023. Consolidated NAV per share was Tk. 39.38 as on December 31, 2024 and Tk. 37.92 as on June 30, 2024.

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