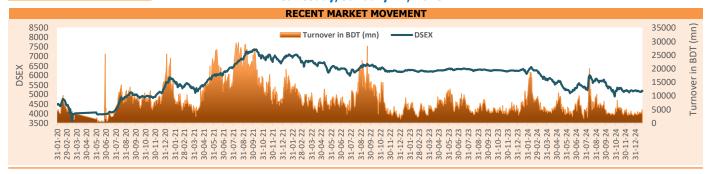


DAILY MARKET REVIEW

Wednesday, January 22, 2025



			DSE MARKET SUN	1MARY			
	Today	Yday	Point Change	Δ Daily	Δ1 Month	Δ YTD	Δ1 Year
DSEX	5,177	5,203 🔻	(25.4)	-0.5%	0.1%	-17.1%	-17.2%
DS30	1,920	1,925 🔻	(5.5)	-0.3%	-0.1%	-8.3%	-10.6%
DSMEX (SME)	1,098	1,086 📤	12.3	1.1%	0.6%	-13.1%	-17.7%
Market Cap (BDT bn)	6,609	6,620 🔻	(10.9)	-0.2%	0.3%	-15.4%	-14.5%
Turnover (BDT mn)	4,130	4,991 🔻	(861.2)	-17.3%	36.2%	-37.5%	-60.4%
Total Trade	133,417	163,900 🔻	(30,483.0)	-18.6%	24.8%	-17.3%	-50.2%
Volume (mn)	126	179 🔻	(52.5)	-29.4%	18.9%	-43.1%	-62.5%

		C	SE MARKET SUM	MARY			
	Today	Yday	Point Change	Daily	Δ1 Month	Δ YTD	Δ1 Year
CSCX	8,836	8,830 📤	5.7	0.1%	0.3%	-20.2%	-19.0%
CASPI	14,518	14,512 📤	6.9	0.0%	0.4%	-21.6%	-20.4%
Market Cap (BDT bn)	6,943	6,944 🔻	(1.4)	0.0%	-0.2%	-10.5%	-9.6%
Turnover (BDT mn)	54	46 📤	8.9	19.6%	-95.6%	-61.7%	-75.1%
Total Trade	1,382	1,696 🔻	(314.0)	-18.5%	-11.6%	-68.9%	-88.4%
Volume ('000)	1,853	2,014 🔻	(161.0)	-8.0%	-94.5%	-65.4%	-80.3%

TODAY'S MARKET COMMENTARY

The benchmark index of the Dhaka bourse failed to sustain the short-lived recovery witnessed in the past three sessions and reverted to a red trajectory as cautious investors were enticed into profit booking due to the weakened strength of the market trend amid prevailing concerns over the market's momentum. DSEX, the broad index of the Dhaka Stock Exchange, declined by 25.4 points to settle at 5,177 points as against 5,203 points in the previous trading session. The market extended its volatility from the previous session, while sellers exerted their dominance over the trading floor that pushed the majority of scrips to slide into the red territory. Meanwhile, market turnover also decreased by 17.3% to BDT 4.1 billion as against BDT 4.3 billion in the previous session. On the sectoral front, Pharma (18.0%) issues exerted the highest turnover, followed by IT (17.2%) and Bank (12.2%) sectors. Most of the sectors displayed dismal returns, out of which Services (-2.1%), Ceramic (-1.4%) and Financial Institution (-1.3%) exerted the most corrections, while IT (0.7%), Paper (0.5%) and Jute (0.5%) exhibited some gains on the bourse today. Out of the 397 issues traded, 92 advanced, 245 declined and 60 remained unchanged.

The port city bourse, CSE, however, settled on green terrain. The Selective Categories' Index (CSCX) and All Share Price Index (CASPI) edged up by 5.7 and 6.9 points, respectively.

Sources: DSE, http://www.dsebd.org; http://www.bloomberg.com; EBLSL Research Team;

^{*}Turnover includes block trade in DSE; **Return means Capital gain plus any dividend yield;

^{**}PE includes negative earnings and MFs

> Index Impact=Prev day closing index multiplied by Change in free float market cap multiplied by Last day free float market weight; >>Free float= Total holding-Sponsors-Gov.t holding;

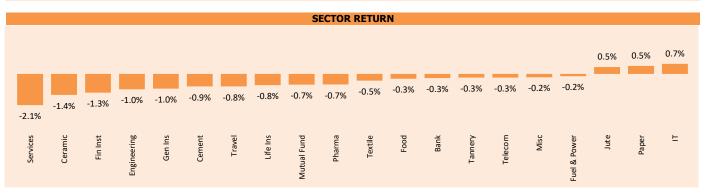
EBL Securities Ltd.

DAILY MARKET REVIEW

Wednesday, January 22, 2025

	MARKET VALUATION					SCRIP W	ISE PERFORMANC	E	
		Today	Yday		Advanced		Declined	U	nchanged
Market P/NAVPS Market Fw. P/E**		1.22 15.66	1.22 15.73	•	92	•	245		60

			DAY'S SECTOR MO	VEMENT			
Castan	T (0/ -f.T/O			T.D.C.()	E D/E ()	D (NA) ((-)
Sector	Turnover (mn)	% of T/O	M. Cap (mn)	% of M. Cap	T.PE (x)	F. P/E (x)	P/NAV (x)
Bank	505.3	12.2%	671,275	18.8%	7.0	6.6	0.7
Cement	46.9	1.1%	88,225	2.5%	10.8	13.5	1.9
Ceramics	79.6	1.9%	16,737	0.5%	31.4	333.2	1.0
Engineering	403.6	9.8%	290,596	8.2%	12.9	19.2	0.9
Financial Institutions	53.3	1.3%	106,370	3.0%	(3.9)	27.7	(2.6)
Food & Allied	251.3	6.1%	302,298	8.5%	15.8	13.9	4.3
Fuel & Power	181.3	4.4%	284,170	8.0%	26.2	5.7	0.6
General Insurance	87.9	2.1%	77,090	2.2%	13.8	12.9	1.2
IT	711.1	17.2%	27,715	0.8%	20.8	20.7	1.6
Jute	33.7	0.8%	3,029	0.1%	(60.3)	46.2	(17.9)
Life Insurance	112.1	2.7%	45,633	1.3%	46.3	n/a	n/a
Miscellaneous	172.4	4.2%	234,308	6.6%	43.3	33.1	1.8
Mutual Fund	69.3	1.7%	26,772	0.8%	(8.5)	5.1	0.5
Paper & Printing	144.1	3.5%	18,709	0.5%	70.2	36.6	0.8
Pharma. & Chemicals	741.7	18.0%	552,656	15.5%	13.7	11.6	1.6
Services & Real Est.	44.1	1.1%	17,304	0.5%	13.8	10.3	0.7
Tannery	23.5	0.6%	22,429	0.6%	40.3	28.3	1.5
Telecommunication	75.6	1.8%	624,142	17.5%	16.4	13.4	4.4
Textile	332.7	8.1%	113,896	3.2%	211.6	14.5	0.8
Travel & Leisure	60.2	1.5%	37,922	1.1%	16.2	67.7	0.3
Equity Market	4,129.8	100.0%	3,561,276	100.0%			



	TODAY'S INDEX (DSEX) PULLER>			TODAY'S INDEX (DSEX) DRAGGER>	
TICKER	%Δ in M.Cap	(+)ve Cont.	TICKER	%Δ in M.Cap	(-)ve Cont.
BRACBANK	1.4%	2.5	ISLAMIBANK	-0.9%	(2.4)
SUMITPOWER	2.7%	0.6	WALTONHIL	-1.3%	(2.0)
GENEXIL	6.3%	0.5	SQURPHARMA	-0.4%	(1.5)
UTTARABANK	0.8%	0.4	RENATA	-1.1%	(1.4)
CONFIDCEM	3.0%	0.4	BEACONPHAR	-1.5%	(1.0)
ALARABANK	0.5%	0.4	NBL	-2.0%	(1.0)
CVOPRL	5.4%	0.4	LHB	-1.0%	(0.8)
MPETROLEUM	1.0%	0.3	ORIONPHARM	-3.5%	(0.8)
ANWARGALV	6.3%	0.3	SINGERBD	-4.1%	(0.7)
MONNOCERA	3.9%	0.3	SOUTHEASTB	-2.2%	(0.7)

Sources: DSE, http://www.dsebd.org; http://www.bloomberg.com; EBLSL Research Team;

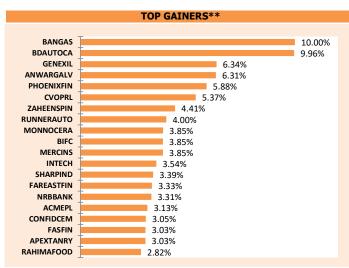
Note: Disclaimer has been annexed at the end of the report.

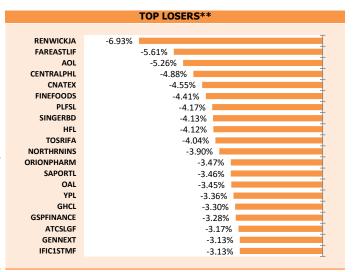


DAILY MARKET REVIEW

Wednesday, January 22, 2025







	TOP 20 TURNOVE	ER* (BDT mn)		TOP MKT CAP (BDT mn)				
TICKER	Turnover	% Turnover	Price	Ticker	M. Cap (mn)	MKT. Weight	Price	
ADNTEL	545.7	13.2%	110.1	GP	453,296	12.7%	335.7	
MIDLANDBNK	170.1	4.1%	26.0	SQURPHARMA	192,094	5.4%	216.7	
BRACBANK	128.7	3.1%	50.1	BATBC	188,838	5.3%	349.7	
SQURPHARMA	115.2	2.8%	216.7	WALTONHIL	152,615	4.3%	503.8	
KOHINOOR	97.9	2.4%	576.9	ROBI	147,186	4.1%	28.1	
ORIONINFU	90.4	2.2%	381.6	BEXIMCO	103,575	2.9%	110.1	
KBPPWBIL	82.4	2.0%	176.5	BRACBANK	88,663	2.5%	50.1	
ASIATICLAB	78.4	1.9%	39.0	BERGERPBL	84,695	2.4%	1,826.2	
GENEXIL	75.8	1.8%	28.5	ISLAMIBANK	74,704	2.1%	46.4	
LOVELLO	65.4	1.6%	84.3	MARICO	72,582	2.0%	2,304.2	
SUNLIFEINS	64.7	1.6%	70.1	UPGDCL	71,708	2.0%	123.7	
AFTABAUTO	56.4	1.4%	38.3	RENATA	66,868	1.9%	583.0	
MONNOCERA	53.7	1.3%	83.6	LHB	57,604	1.6%	49.6	
FINEFOODS	53.5	1.3%	193.0	ICB	49,347	1.4%	56.9	
MONOSPOOL	52.3	1.3%	109.9	UNILEVERCL	48,770	1.4%	2,530.3	
DSSL	49.2	1.2%	11.7	DUTCHBANGL	44,644	1.3%	50.8	
ORIONPHARM	48.0	1.2%	36.2	BXPHARMA	34,931	1.0%	78.3	
ANWARGALV	47.0	1.1%	74.1	PUBALIBANK	33,432	0.9%	28.9	
BESTHLDNG	44.6	1.1%	18.7	EBL	33,003	0.9%	24.3	
CENTRALPHL	44.1	1.1%	11.7	CITYBANK	30,444	0.9%	22.6	

EBL Securities Ltd.

DAILY MARKET REVIEW

Wednesday, January 22, 2025

UPCOMING DIVIDENDS							
Ticker	Period	Cash Div	Bonus Div	EPS (BDT)	NAVPS (BDT)	Record Date	AGM Date

	TODAY'S TOP BLOCK TR	ANSACTIONS		UPCOMING BOARD MEETING DATE				
Ticker	Volume ('000)	Value (mn)	Price Range	Ticker	Period	Meeting Date		
ADNTEL	1,180.0	135.5	112.5 - 115	NTC	FY 2024	23-Jan-25		
KOHINOOR	89.8	50.4	558 - 572.5	RENATA	Q2 2025	25-Jan-25		
MIDLANDBNK	1,464.7	36.6		SAMORITA	Q2 2025	25-Jan-25		
SQURPHARMA	116.2	25.4		ANLIMAYARN	Q2 2025	25-Jan-25		
RENATA	30.0	17.4		IBNSINA	Q2 2025	25-Jan-25		
LOVELLO	187.2	16.1		BSCPLC	Q2 2025	25-Jan-25		
BRACBANK	294.3	14.7		BERGERPBL	Q3 2024	26-Jan-25		
TOSRIFA	449.8	9.4	21 - 21		Q2 2025	26-Jan-25		
PRAGATILIF	80.0	9.1		MONNOFABR	Q2 2025	26-Jan-25		
AIL	74.3			APEXFOOT				
		6.8		SINGERBD	Q2 2025	26-Jan-25		
EIL	80.0	4.6			FY 2024	27-Jan-25		
BSC	40.0	3.7		RAKCERAMIC	FY 2024	27-Jan-25		
LHB	55.0	3.0		WALTONHIL	Q2 2025	27-Jan-25		
RDFOOD	129.9	2.9		MARICO	Q3 2025	27-Jan-25		
RELIANCE1	123.0	2.7		INDEXAGRO	Q2 2025	27-Jan-25		
PROVATIINS	52.0	2.0	38.4 - 39.5	RANFOUNDRY	Q2 2025	27-Jan-25		
EASTLAND	81.4	1.7	20.4 - 20.4					
MJLBD	14.8	1.4	97 - 97		SELECTED NEWS IN BRIEF			
UPGDCL	11.0	1.4	129.1 - 129.1	JUL-SEP FDI INFLOV	W HITS LOWEST IN 11 YEARS: The cou	intry's net foreign direct		
MONNOFABR	75.1	1.4	18.3 - 18.3	investment (FDI) in	flow during the first quarter of fiscal y	ear 2024-25 dropped to		
SONARGAON	33.4	1.1	32.5 - 33	\$104 million, the lov	west in 11 years. According to data from	the central bank, net FDI		
ORIONPHARM	29.0	1.1	36.5 - 36.5		quarter of FY24 was \$361 million. This n			
ACI	6.6	1.0	150.4 - 150.4		ompared to the previous fiscal year.			
KBPPWBIL	6.0	1.0	160 - 160		v.tbsnews.net/economy/jul-sep-fdi-inflo	w-hits-lowest-11-vears-		
ICBSONALI1	116.8	0.9	8 - 8	1049206				
BERGERPBL	0.4	0.6	1793.1 - 1793.1		LOOKS CLOAKED IN UNCERTAINTY:	Announcement of the		
BATBC	1.6	0.6	380.6 - 380.6		atement (MPS) for the second half of			
LINDEBD	0.6	0.6	910.3 - 910.3	, , ,	, ,	,		
TECHNODRUG	14.5	0.5	37.6 - 37.6		ked in uncertainty probably because of			
SAMORITA	9.3	0.5	55.5 - 55.5	•	conomic indicators. With the postponer			
574171014171		-	-	•	ogramme set for January 27th beco	mes largely uncertain,		
	_	_	_	according to official				
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