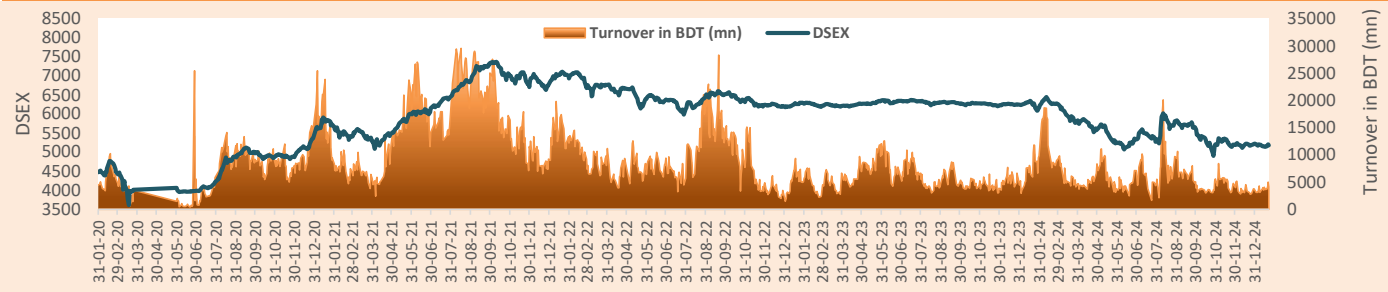


RECENT MARKET MOVEMENT

DSE MARKET SUMMARY

	Today	Yday	Point Change	Δ Daily	Δ 1 Month	Δ YTD	Δ 1 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%

CSE MARKET SUMMARY

	Today	Yday	Point Change	Daily	Δ 1 Month	Δ YTD	Δ 1 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;

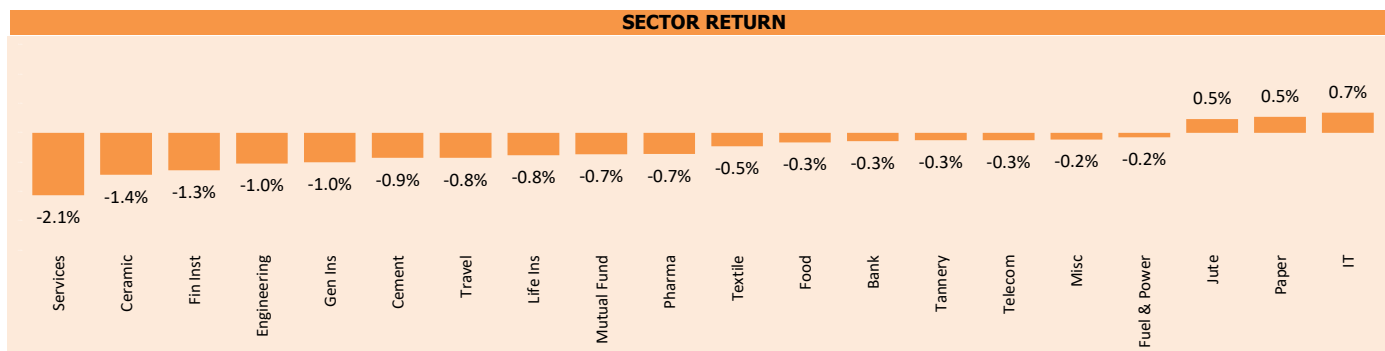
*Turnover includes block trade in DSE; **Return means Capital gain plus any dividend yield;

**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;

MARKET VALUATION			SCRIP WISE PERFORMANCE			
	Today	Yday	Advanced	Declined	Unchanged	
Market P/NAVPS	1.22	1.22				
Market Fw. P/E**	15.66	15.73	↑ 92	↓ 245	▬ 60	

DAY'S SECTOR MOVEMENT							
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)

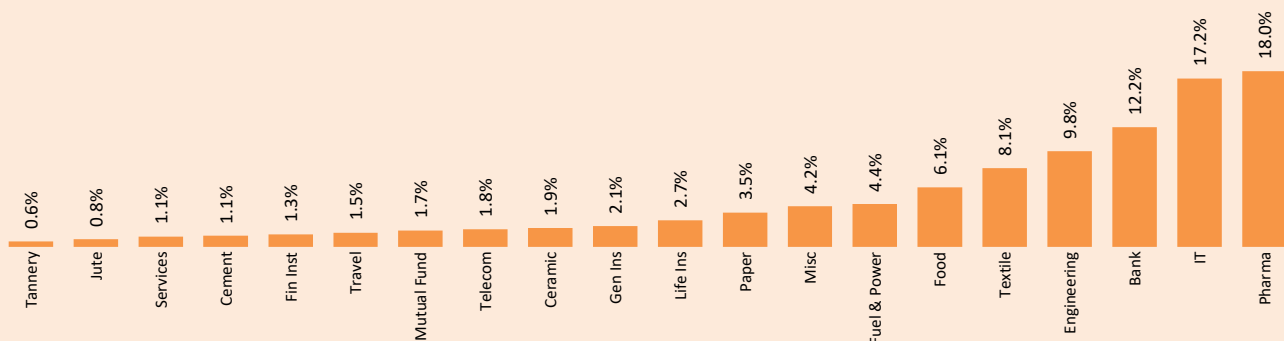
Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

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

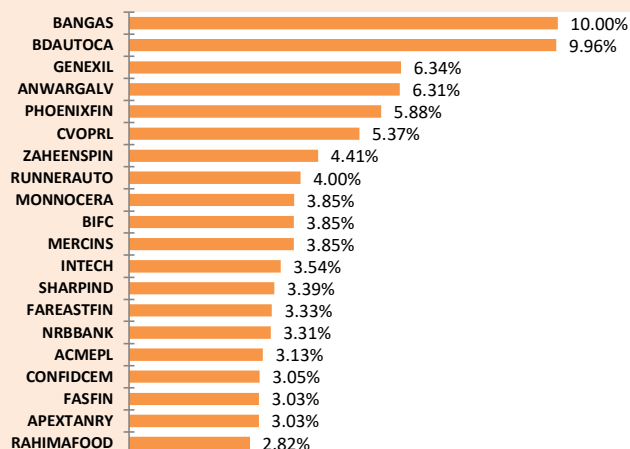
DAILY MARKET REVIEW

Wednesday, January 22, 2025

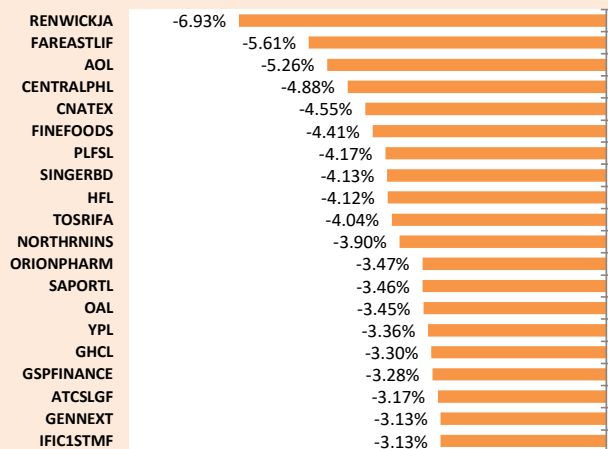
TURNOVER DISTRIBUTION



TOP GAINERS**



TOP LOSERS**



TOP 20 TURNOVER* (BDT mn)

TICKER	Turnover	% Turnover	Price
ADNTEL	545.7	13.2%	110.1
MIDLANDBNK	170.1	4.1%	26.0
BRACBANK	128.7	3.1%	50.1
SQURPHARMA	115.2	2.8%	216.7
KOHINOOR	97.9	2.4%	576.9
ORIONINFU	90.4	2.2%	381.6
KBPPWBIL	82.4	2.0%	176.5
ASIATICLAB	78.4	1.9%	39.0
GENEXIL	75.8	1.8%	28.5
LOVELLO	65.4	1.6%	84.3
SUNLIFEINS	64.7	1.6%	70.1
AFTABAUTO	56.4	1.4%	38.3
MONNOCERA	53.7	1.3%	83.6
FINEFOODS	53.5	1.3%	193.0
MONOSPOOL	52.3	1.3%	109.9
DSSL	49.2	1.2%	11.7
ORIONPHARM	48.0	1.2%	36.2
ANWARGALV	47.0	1.1%	74.1
BESTHLDNG	44.6	1.1%	18.7
CENTRALPHL	44.1	1.1%	11.7

TOP MKT CAP (BDT mn)

Ticker	M. Cap (mn)	MKT. Weight	Price
GP	453,296	12.7%	335.7
SQURPHARMA	192,094	5.4%	216.7
BATBC	188,838	5.3%	349.7
WALTONHIL	152,615	4.3%	503.8
ROBI	147,186	4.1%	28.1
BEXIMCO	103,575	2.9%	110.1
BRACBANK	88,663	2.5%	50.1
BERGERPBL	84,695	2.4%	1,826.2
ISLAMIBANK	74,704	2.1%	46.4
MARICO	72,582	2.0%	2,304.2
UPGDCL	71,708	2.0%	123.7
RENATA	66,868	1.9%	583.0
LHB	57,604	1.6%	49.6
ICB	49,347	1.4%	56.9
UNILEVERCL	48,770	1.4%	2,530.3
DUTCHBANGL	44,644	1.3%	50.8
BXPHARMA	34,931	1.0%	78.3
PUBALIBANK	33,432	0.9%	28.9
EBL	33,003	0.9%	24.3
CITYBANK	30,444	0.9%	22.6

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