

## Market Commentary

### Market closed lower after two trading sessions

The broad market DSEX index went down by 8.2 points to close at 6,286.53 (-0.13%) points at the day's end. Market movement today was driven by negative changes in the market cap of Travel & Leisure, Life Insurance, and Paper & Printing scrips amid positive changes in the market cap of Bank, Food & Allied, and Cement scrips.

Day's turnover today stood at BDT 7,527.5 mn, a 9.55% increase compared to the previous trading session. GENEXIL (-3.47%) topped the turnover list today, followed by BSC (5.47%), ORIONPHARM (1.54%), and OLYMPIC (2.02%). 43 scrips gained market cap today, 133 lost, and 171 remained unchanged. Total block market turnover stood at BDT 649.3 mn, representing 8.6% of the day's total turnover.

### Table: Market Breadth

Category	Advanced	Declined	Unchanged
All	43	133	171

### Chart: DSEX movement today



### Table: Top 10 Turnover

Company	Price (BDT)	Change (%)	Turnover (BDT mn)
GENEXIL	105.6	-3.47%	1,011.8
BSC	140.7	5.47%	676.3
ORIONPHARM	92.3	1.54%	462.2
OLYMPIC	146.8	2.02%	281.4
SPCERAMICS	50.3	-2.33%	251.8
AAMRANET	67.2	-3.59%	245.9
EHL	105.6	-2.40%	231.3
BPML	88.2	-0.23%	230.7
ORIONINFU	385.9	5.84%	164.1
GEMINISEA	455.4	2.54%	145.7

### Table: Top 10 Gainers

Company	Price (BDT)	Change (%)	Turnover (BDT mn)
HWAWELLTEX	52.9	9.98%	19.1
LIBRAINFU	723.1	6.23%	7.3
ORIONINFU	385.9	5.84%	164.1
APEXFOOT	277.1	5.80%	66.9
BSC	140.7	5.47%	676.3
DSHGARME	114.9	4.93%	2.8
JAMUNAOIL	178.5	3.24%	32.9
RANFOUNDRY	160.2	3.22%	7.9
AMBEEPFA	481.8	3.17%	1.0
ANLIMAYARN	32.0	2.89%	1.8

### Table: Top 10 Losers

Company	Price (BDT)	Change (%)	Turnover (BDT mn)
BEACONPHAR	294.2	-4.54%	50.5
MEGHNALIFE	85.4	-4.15%	114.1
AAMRANET	67.2	-3.59%	245.9
GENEXIL	105.6	-3.47%	1,011.8
SEAPEARL	261.6	-3.47%	127.1
SONALILIFE	67.3	-3.44%	53.1
RUPALILIFE	90.4	-3.42%	117.3
EGEN	50.2	-3.28%	26.3
SANDHANINS	28.4	-3.07%	10.2
PRAGATIINS	71.9	-2.97%	15.0

Data Source: DSE, BB, Investing.com & SSL Research

Note:

- In calculating valuation multiples, we have used last 4 quarterly earnings for Trailing P/E; latest audited book value for P/BV; Companies with negative earnings have been excluded from our calculation of P/E multiples. BDT/USD official exchange rate from the Bangladesh Bank was used to convert BDT figures to USD figures.

### Table: Market Summary

Index	05-Feb-23	02-Feb-23	Change %	YTD Change (%)
DSEX	6,286.5	6,294.7	-0.13%	1.28%
DSES	1,368.2	1,374.0	-0.42%	0.69%
DS30	2,226.3	2,230.7	-0.20%	1.41%
DSMEX	1,199.5	1,211.6	-0.99%	-8.85%

### Table: DSE Market Statistics

Particulars	05-Feb-23	02-Feb-23	Change %
Turnover (BDT mn)	7,527.5	6,871.2	9.55%
Turnover (USD mn)	72.8	66.4	9.55%
No. of Trade	136,227	125,588	8.47%
Total Volume (mn)	100.9	104.0	-3.00%
Market Cap (BDT bn)	7,671.1	7,673.4	-0.03%
Market Cap (USD bn)	73.5	73.5	-0.03%
Trailing P/E	14.8x	14.8x	-6bps
P/B	1.5x	1.5x	-6bps
D/Y	3.1%	3.1%	4bps

### Table: Commodities (USD)

Name	05-Feb-23	02-Feb-23	Change	Change %
Gold	1,877.7	1,930.8	(53.10)	-2.75%
Silver	22.4	23.6	(1.23)	-5.19%
Crude Oil	73.2	75.9	(2.65)	-3.49%
Brent Oil	79.8	82.2	(2.35)	-2.86%
Natural Gas	2.4	2.5	(0.07)	-2.89%
US Wheat	757.0	760.0	(3.00)	-0.39%
US Cotton	85.3	86.4	(1.07)	-1.24%
US Sugar	21.3	21.7	(0.36)	-1.66%

### Table: Exchange Rate (BDT/Per Unit)

Currency	Buying	Selling	Mid-Point
USD	103.43	105.35	104.39
EUR	111.73	114.82	113.28
GBP	127.33	129.98	128.65
JPY	0.79	0.81	0.80
INR	1.19	1.19	1.19
LKR	3.74	3.84	3.79

**Table: Sectorwise Statistics**

DSE Sector Details		MCAP & Return				Turnover		Valuations	
Sector Name	No. of Scrips	MCAP (BDT mn)	MCAP (USD mn)	Daily Change	YTD Change	Daily (BDT mn)	% Share of Daily	TTM P/E	P/BV
Bank	34	670,664.6	6,424.7	0.19%	0.65%	111.6	1.48%	6.92x	0.71x
Cement	7	112,303.4	1,075.8	0.39%	0.88%	102.5	1.36%	20.47x	1.27x
Ceramics Sector	5	33,026.9	316.4	-0.45%	1.33%	337.2	4.48%	41.19x	1.94x
Corporate Bond	9	36,415.1	348.8	0.00%	-3.13%	1.5	0.02%	n/m	n/m
Debenture	8	517.5	5.0	0.00%	0.00%	-	0.00%	n/m	n/m
Engineering	42	527,080.3	5,049.2	0.03%	-0.28%	127.0	1.69%	29.96x	1.97x
Financial Institutions	23	189,587.4	1,816.2	0.00%	0.16%	25.5	0.34%	22.26x	1.55x
Food & Allied	21	381,510.8	3,654.7	0.16%	0.78%	523.0	6.95%	21.80x	6.11x
Fuel & Power	23	448,258.2	4,294.1	0.22%	0.31%	271.0	3.60%	13.88x	1.10x
General Insurance	43	101,620.9	973.5	-0.89%	6.91%	322.0	4.28%	9.79x	1.58x
IT Sector	11	42,794.0	409.9	-2.30%	10.70%	1,566.0	20.80%	29.75x	3.00x
Jute	3	3,065.2	29.4	0.09%	-15.62%	38.2	0.51%	289.17x	3.92x
Life Insurance	13	71,482.8	684.8	-1.16%	6.19%	482.4	6.41%	n/m	n/m
Miscellaneous	15	233,529.8	2,237.1	0.51%	2.14%	829.5	11.02%	13.45x	1.84x
Mutual Fund	36	37,672.0	360.9	-0.02%	-0.36%	4.0	0.05%	n/m	0.70x
Paper & Printing	6	41,807.2	400.5	-0.07%	3.37%	313.7	4.17%	52.20x	2.10x
Pharmaceuticals & Chemicals	33	718,764.3	6,885.5	-0.34%	0.09%	976.6	12.97%	17.71x	2.01x
Services & Real Estate	4	30,367.0	290.9	-1.50%	11.96%	367.4	4.88%	20.53x	1.35x
Tannery Industries	6	32,306.1	309.5	0.26%	-1.12%	70.8	0.94%	80.18x	3.23x
Telecommunication	3	580,231.8	5,558.4	0.00%	0.00%	2.8	0.04%	15.03x	3.78x
Textile	58	167,161.6	1,601.3	0.13%	-2.09%	145.1	1.93%	22.48x	1.05x
Travel & Leisure	4	55,926.7	535.8	-2.74%	29.19%	260.5	3.46%	30.94x	1.05x
Treasury Bond	251	3,031,589.0	29,041.4	0.00%	-2.01%	-	0.00%	n/m	n/m

**Table: Top 30 Large Market-Cap. Scrips**

Particulars		MCAP & Return				Turnover		Valuations	
Company Name	Price (BDT)	MCAP (BDT mn)	MCAP (USD mn)	Daily Change	YTD Change	Daily (BDT mn)	% Share of Daily	TTM P/E	P/BV
GP	286.6	386,996.0	3,707.3	0.00%	0.00%	1.1	0.02%	11.31x	9.10x
WALTONHIL	1,047.7	317,378.0	3,040.4	0.00%	0.00%	0.0	0.00%	26.29x	3.27x
BATBC	518.7	280,098.0	2,683.2	0.00%	0.00%	1.2	0.02%	18.71x	6.68x
SQURPHARMA	209.8	185,977.4	1,781.6	0.00%	0.00%	8.2	0.11%	9.70x	1.77x
ROBI	30.0	157,138.0	1,505.3	0.00%	0.00%	0.2	0.00%	87.14x	1.60x
RENATA	1,217.9	139,688.9	1,338.2	0.00%	0.00%	0.1	0.00%	30.84x	4.98x
UPGDCL	233.7	135,474.8	1,297.8	0.00%	0.00%	0.0	0.00%	13.58x	3.81x
BEXIMCO	115.6	101,302.5	970.4	0.00%	0.00%	0.8	0.01%	8.76x	1.22x
BERGERPBL	1,738.3	80,618.7	772.3	0.38%	0.91%	0.7	0.01%	29.46x	6.71x
LHBL	65.9	76,534.5	733.2	0.61%	1.70%	100.3	1.33%	19.72x	4.12x
MARICO	2,421.5	76,277.3	730.7	0.00%	0.00%	0.8	0.01%	20.66x	28.55x
ICB	87.6	74,118.9	710.0	0.00%	0.00%	0.3	0.00%	135.26x	1.74x
BEACONPHAR	294.2	67,960.2	651.0	-4.54%	2.87%	50.5	0.67%	72.46x	10.99x
BXPHARMA	146.2	65,221.6	624.8	0.00%	0.00%	75.4	1.00%	14.08x	1.56x
BRACBANK	38.5	57,618.5	552.0	0.00%	0.00%	0.2	0.00%	7.37x	0.97x
ISLAMIBANK	33.1	53,290.7	510.5	-0.60%	0.30%	6.5	0.09%	10.94x	0.78x
DUTCHBANGL	62.6	43,554.0	417.2	0.00%	0.00%	0.9	0.01%	8.17x	1.09x
TITASGAS	40.9	40,459.2	387.6	0.00%	0.00%	0.4	0.01%	12.33x	0.55x
POWERGRID	52.4	37,346.9	357.8	0.00%	0.00%	0.0	0.00%	n/m	0.38x
SUMITPOWER	34.0	36,307.8	347.8	0.00%	0.00%	0.0	0.00%	9.94x	0.91x
BSCCL	218.9	36,097.8	345.8	0.00%	0.00%	1.4	0.02%	14.02x	2.91x
UNILEVERCL	2,849.0	34,320.3	328.8	0.00%	0.00%	0.9	0.01%	65.05x	23.02x
EBL	31.8	34,124.5	326.9	0.00%	0.00%	2.5	0.03%	7.34x	0.99x
OLYMPIC	146.8	29,351.0	281.2	2.02%	18.39%	281.4	3.74%	19.11x	3.08x
MJLBD	86.7	27,462.4	263.1	0.00%	0.00%	0.2	0.00%	12.13x	2.18x
TRUSTBANK	34.9	27,165.7	260.2	0.00%	0.00%	0.2	0.00%	10.40x	1.34x
PUBALIBANK	26.4	27,147.0	260.1	0.38%	0.38%	0.4	0.01%	6.29x	0.64x
BSRMLTD	90.0	26,872.6	257.4	0.00%	0.00%	-	0.00%	n/m	0.71x
NBL	8.3	26,723.8	256.0	0.00%	0.00%	0.2	0.00%	n/m	0.56x
CITYBANK	22.0	26,413.3	253.0	0.92%	0.92%	11.7	0.16%	3.00x	0.79x

**Table: DSE Block Trades**

Company	Price (BDT)		Trade	Volume	Value (BDT mn)
	Max	Min			
SEAPEARL	294.5	277.5	11	424,000	117.96
IPDC	57.6	51.9	6	2,020,690	110.01
BSC	136	132	4	563,480	76.40
BEXIMCO	115.9	104.1	10	654,890	75.08
BXPHARMA	146.2	146.2	1	400,000	58.48
SILVAPHL	20.5	19.5	11	1,164,199	22.75
ADNTEL	125	116.2	2	179,000	21.76
BATBC	480	479.8	11	45,025	21.60
MEGHNALIFE	94	91	2	157,000	14.73
SQURPHARMA	205.5	202	15	71,500	14.65
BRACBANK	38.1	34.7	2	319,095	12.09
BDFINANCE	42.6	42.3	5	173,000	7.35
BSCCL	200.7	199.8	10	33,626	6.72
SONALIPAPR	661	569	5	10,315	6.14
ANWARGALV	213.4	194.7	2	28,800	6.10
ITC	43.4	40	3	144,601	5.97
AAMRANET	71.1	71.1	1	80,000	5.69
ORIONPHARM	99.8	89	2	55,000	5.06
GP	264.9	263	8	19,000	5.03
ACFL	26.2	26.2	1	175,562	4.60
DELTALIFE	136.5	136.5	1	30,000	4.10
ACIFORMULA	156	155	2	25,600	3.98
AOL	33	32.9	2	104,000	3.43
BGIC	65.7	65.7	1	50,100	3.29
KOHINOOR	458	458	1	7,000	3.21
PRAGATILIF	145	140	3	19,469	2.78
BENGALWTL	38	33	2	54,000	1.91
SHAHJABANK	19	19	1	100,000	1.90
UNIONBANK	9.4	9.4	1	197,864	1.86
TITASGAS	37.1	36.9	2	42,511	1.57
AL-HAJTEX	126	124.5	3	12,100	1.51
UNIQUEHRL	72.4	72.4	1	20,000	1.45
GENEXIL	108.5	108.5	1	12,000	1.30
UNIONINS	42.9	42.8	2	29,700	1.27
GSPFINANCE	30.1	30.1	1	40,006	1.20
NAHEEACP	64.9	64.9	1	18,510	1.20
MONOSPOOL	285.2	285.2	1	3,600	1.03
EHL	103	103	1	9,000	0.93
SPCERAMICS	51.9	51.9	1	17,000	0.88
DOMINAGE	17.8	17.8	1	49,000	0.87
EASTLAND	27.4	27.4	1	31,700	0.87
MERCINS	33.5	33.5	1	25,491	0.85
RUNNERAUTO	43.6	43.6	1	15,000	0.65
FUWANGCER	17.3	17.3	1	36,000	0.62
PRIMELIFE	59.6	59.6	1	10,060	0.60
CLICL	66.5	66.5	1	9,000	0.60
MONNOAGML	818	818	1	700	0.57
FEKDIL	15.5	15.5	1	35,000	0.54
IFIC	11.2	11.2	1	48,000	0.54
SAIFPOWER	26.8	26.8	1	20,000	0.54
LINDEBD	1315	1315	1	400	0.53
RENATA	1142	1142	1	459	0.52
MJLBD	80.1	80.1	1	6,500	0.52
GIB	8.1	8.1	1	64,000	0.52
BEACONPHAR	319.5	319.5	1	1,600	0.51
Other	44.7	44.7	1	11,187	2.52
<b>Total</b>					<b>649.3</b>

### Major DSE Declarations Today

#### DBLPBOND: Trading of New Bond

Trading of the Bond of Dhaka Bank Perpetual Bond will commence at DSE from today i.e. February 05, 2023 under 'N' category. DSE Trading Code for Dhaka Bank Perpetual Bond is "DBLPBOND" and DSE Company Code is 26012. Some salient features of the bond are as follows: 1. Name of the Bond: Dhaka Bank Perpetual Bond, 2. Issuer: Dhaka Bank Limited, 3. Issue price: BDT 5,000 per bond, 4. Face value: BDT 5,000 per bond, 5. Market lot: 01 (One), 6. Tenure: N/A, 7. Coupon rate: 6%-10%, 8. Coupon payment frequency: Semi-Annual.

#### EXCH: Crediting gain on transaction of equity securities at ATB to IPF

This is for information of all concerned that "if any investor or beneficial owner makes any gain by the purchase and sale, or the sale and purchase, of any equity security within a period of less than 3 (three) months, such investors or beneficial owner shall make a report to the Exchange and tender the amount of such gain to the investors' protection fund" as per regulation 9(5)(g) of the Dhaka Stock Exchange (Alternative Trading Board) Regulations, 2022. As such, all TREC Holder Companies are requested to make aware their investors about depositing/crediting aforementioned gain to Investor Protection Fund of DSE. Account Name: "Dhaka Stock Exchange Investor Protection Fund", Account No. 3101063951001, The City Bank Ltd., Principal Branch, Dhaka and also submit a report as per requirement of aforesaid regulation and DSE Circular No.: DSE/SME, ATB & OTC/2023/558 dated January 25, 2023.

### Important Disclosures:

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