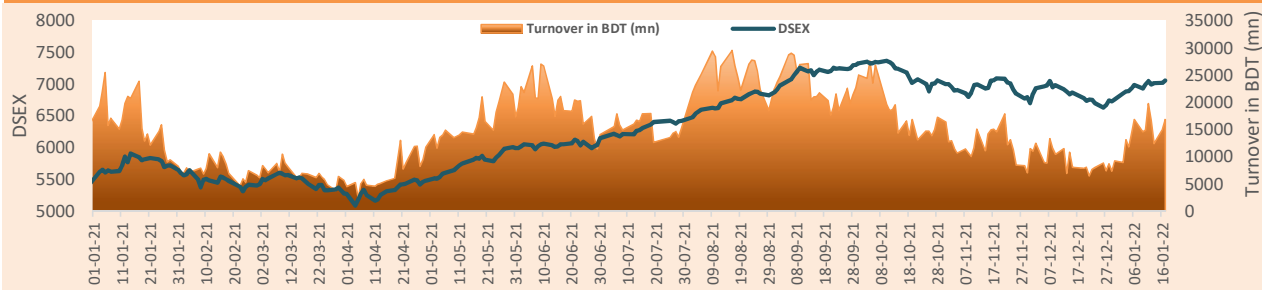


DAILY MARKET REVIEW

Monday, January 17, 2022

RECENT MARKET MOVEMENT



DSE MARKET SUMMARY

	Today	Yday	Point Change	Δ Daily	Δ 1 Month	Δ YTD	Δ 1 Year
DSEX	7,055	7,020	▲ 35.7	0.5%	4.0%	4.4%	20.6%
DS30	2,608	2,598	▲ 9.5	0.4%	2.4%	3.0%	18.1%
DSMEX (SME)	591	603	▼ (11.3)	-1.9%	-3.7%	-4.5%	n/a
Market Cap (BDT bn)	5,661	5,647	▲ 14.5	0.3%	3.6%	4.4%	14.1%
Turnover (BDT mn)	16,867	15,068	▲ 1,799.3	11.9%	114.5%	83.0%	-29.3%
Total Trade	263,750	250,918	▲ 12,832.0	5.1%	24.7%	67.2%	-12.6%
Volume (mn)	323	312	▲ 10.9	3.5%	57.4%	87.4%	-55.6%

CSE MARKET SUMMARY

	Today	Yday	Point Change	Daily	Δ 1 Month	Δ YTD	Δ 1 Year
CSCX	12,405	12,354	▲ 50.2	0.4%	4.6%	5.0%	20.6%
CASPI	20,651	20,567	▲ 83.5	0.4%	4.6%	5.0%	21.1%
Market Cap (BDT bn)	4,952	4,938	▲ 14.0	0.3%	4.8%	5.4%	16.9%
Turnover (BDT mn)	452	424	▲ 27.8	6.5%	-17.9%	-22.9%	-70.2%
Total Trade	14,763	13,568	▲ 1,195.0	8.8%	-54.9%	19.9%	-54.6%
Volume ('000)	11,548	11,252	▲ 296.9	2.6%	-51.7%	-51.5%	-72.8%

TODAY'S MARKET COMMENTARY

Indices on the Dhaka stock exchange settled upward as expectations of positive market momentum are driving investors' buying spree, beating worries of rising Covid cases in the country. DSEX, the prime index of the Dhaka Stock Exchange, ended higher with a rise of 35.7 points and settled at 7,055 points. The buoyant investors showed their buying appetite in a few sector-specific issues ahead of the forthcoming earning declarations. As a result, investors' participation in the market advanced while total turnover has increased by 11.9% and stood at 16.87bn as against BDT 15.07bn in the previous session. On the sectoral front, Miscellaneous (13.9%) issues exerted the highest turnover followed by Pharma (11.3%) and Fuel & Power (9.6%) stocks. The majority of the sectors displayed satisfactory performance, out of which Services (5.0%), General Insurance (2.1%), and Miscellaneous (2.0%) have exerted the most positive returns while Ceramics (-4.7%), Jute (-2.9%), and Paper (-1.6%) observed the most corrections on the bourse today. The majority of the stocks closed in green territory. Out of the 383 issues traded, 173 advanced, 152 declined, and 58 remained unchanged.

The port city bourse, CSE, settled in green terrain. The selected indices (CSCX) and All Share Price Index (CASPI) advanced by 50.2 points and 83.5 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;

PE2=PE includes negative earnings and MFs; PE3=PE Based on last audited net earnings, excluding negative earnings.

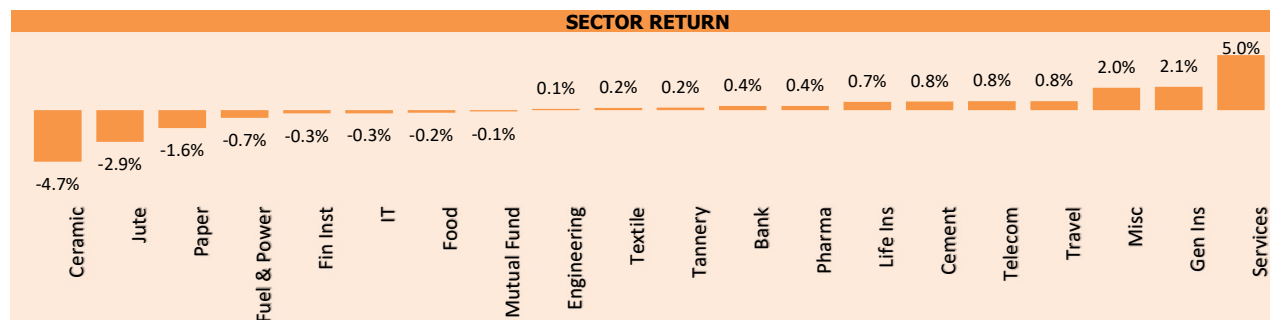
> Index Impact=Prev day closing index multiplied by Change in free float market cap multiplied by Last day free float market weight; >>Free float= Total holding-Sponsors-Gov.t holding;

DAILY MARKET REVIEW

Monday, January 17, 2022

MARKET VALUATION	Today		SCRIP WISE PERFORMANCE		
	Today	Yday	Advanced	Declined	Unchanged
Market P/NAVPS	2.0	2.0			
Market Fw. P/E ⁺	16.2	16.1	↑ 173	↓ 152	→ 58
DSEX Trailing PE ³	17.9	17.8			

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	846.9	5.0%	740,221	14.7%	10.2	8.0	0.9
Cement	242.7	1.4%	139,808	2.8%	27.2	23.2	2.9
Ceramics	544.2	3.2%	36,685	0.7%	83.1	39.6	2.3
Engineering	1,402.9	8.3%	578,360	11.5%	18.0	20.8	2.1
Financial Institutions	517.0	3.1%	234,912	4.7%	25.2	23.5	4.3
Food & Allied	1,098.2	6.5%	456,322	9.1%	33.6	25.2	9.2
Fuel & Power	1,606.2	9.6%	514,559	10.2%	13.0	12.8	1.3
General Insurance	752.9	4.5%	131,209	2.6%	25.5	20.0	2.2
IT	322.8	1.9%	39,225	0.8%	33.5	26.9	2.8
Jute	9.0	0.1%	2,038	0.0%	74.6	665.2	23.7
Life Insurance	1,190.3	7.1%	84,141	1.7%	106.4	n/a	n/a
Miscellaneous	2,337.8	13.9%	259,092	5.2%	24.0	12.7	2.3
Mutual Fund	56.1	0.3%	41,652	0.8%	5.0	4.3	0.6
Paper & Printing	238.2	1.4%	32,973	0.7%	63.5	36.6	2.1
Pharma. & Chemicals	1,902.7	11.3%	733,899	14.6%	20.1	16.3	2.8
Services & Real Est.	1,184.4	7.0%	30,292	0.6%	24.7	23.0	1.4
Tannery	498.5	3.0%	39,734	0.8%	108.0	43.1	4.0
Telecommunication	312.1	1.9%	734,277	14.6%	18.0	18.8	6.3
Textile	1,505.0	9.0%	172,937	3.4%	27.7	18.5	1.1
Travel & Leisure	237.8	1.4%	27,626	0.5%	225.9	187.7	0.8
Equity Market	16,805.5	100.0%	5,029,963	100.0%			

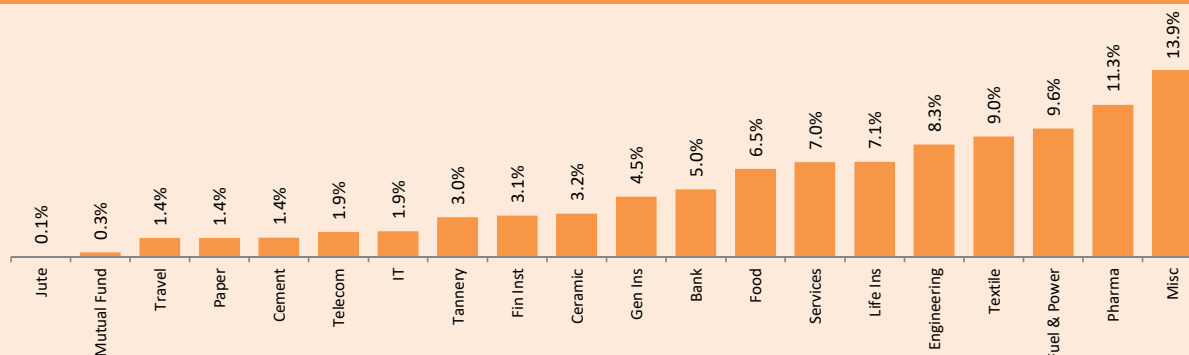


TODAY'S INDEX (DSEX) PULLER ^{>}				TODAY'S INDEX (DSEX) DRAGGER ^{>}			
TICKER	%Δ in M.Cap	(+ve Cont.		TICKER	%Δ in M.Cap	(-ve Cont.	
BEXIMCO	2.0%	6.8		TITASGAS	-6.4%	(3.0)	
ORIONPHARM	6.8%	4.2		RAK CERAMIC	-6.4%	(1.8)	
BSC	9.8%	3.5		POWERGRID	-2.9%	(1.5)	
BSRMLTD	4.8%	3.2		DELTALIFE	-1.7%	(1.0)	
SAIFPOWER	7.7%	2.8		BATBC	-0.3%	(0.9)	
ROBI	3.1%	2.4		BRACBANK	-0.5%	(0.9)	
SIBL	6.4%	2.2		EBL	-0.8%	(0.8)	
LHBL	1.4%	1.8		FAREASTLIF	-3.0%	(0.7)	
ACMELAB	3.1%	1.3		CVOPRL	-5.0%	(0.7)	
RENATA	0.4%	1.2		BSCCL	-1.5%	(0.6)	

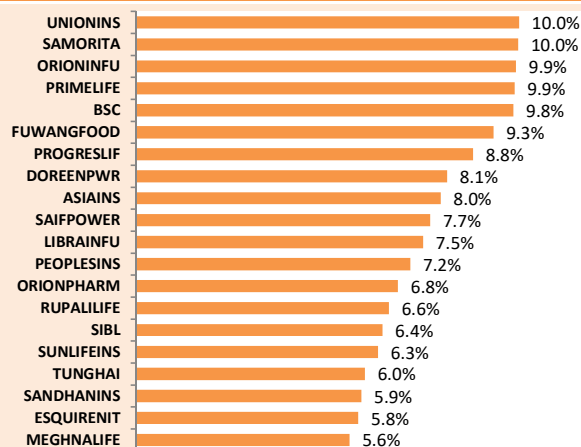
Sources: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; EBLSL Research Team;

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

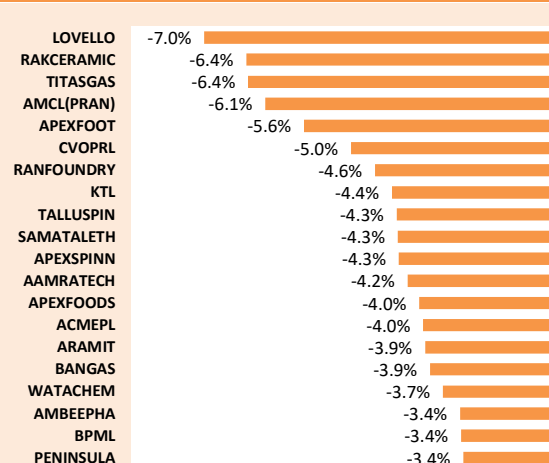
TURNOVER DISTRIBUTION



TOP GAINERS**



TOP LOSERS**



TOP 20 TURNOVER* (BDT mn)

TICKER	Turnover	% Turnover	Price
BSC	1,318.1	7.8%	138.3
SAIFPOWER	1,021.5	6.1%	46.3
BEXIMCO	909.3	5.4%	147.9
ORIONPHARM	764.5	4.5%	106.3
POWERGRID	550.3	3.3%	73.2
PTL	514.5	3.1%	107.2
RAKCERAMIC	456.5	2.7%	57.0
GPHISPAT	452.7	2.7%	63.3
FORTUNE	441.4	2.6%	129.3
FAREASTLIF	426.8	2.5%	104.5
FUWANGFOOD	329.7	2.0%	21.1
TITASGAS	306.7	1.8%	45.5
LOVELLO	237.0	1.4%	46.6
ORIONINFU	236.8	1.4%	104.2
LHBL	211.7	1.3%	80.5
DELTALIFE	210.9	1.3%	185.1
SIBL	204.1	1.2%	18.2
PHARMAID	199.9	1.2%	677.8
GSPFINANCE	185.6	1.1%	29.0
PENINSULA	171.9	1.0%	42.7

TOP MKT CAP (BDT mn)

Ticker	M. Cap (mn)	MKT. Weight	Price
GP	485,433	9.7%	359.5
BATBC	349,380	6.9%	647.0
WALTONHIL	344,914	6.9%	1,138.6
ROBI	212,136	4.2%	40.5
SQURPHARMA	195,817	3.9%	220.9
UPGDCL	150,083	3.0%	258.9
RENATA	141,570	2.8%	1,320.7
BEXIMCO	129,608	2.6%	147.9
ICB	103,547	2.1%	128.5
LHBL	93,491	1.9%	80.5
BXPBARMA	86,903	1.7%	194.8
BERGERPBL	83,202	1.7%	1,794.0
BRACBANK	79,493	1.6%	57.1
MARICO	72,897	1.4%	2,314.2
BEACONPHAR	55,509	1.1%	240.3
POWERGRID	52,172	1.0%	73.2
ISLAMIBANK	51,520	1.0%	32.0
DUTCHBANGL	49,841	1.0%	78.8
TITASGAS	45,010	0.9%	45.5
SUMITPOWER	42,395	0.8%	39.7

DAILY MARKET REVIEW

Monday, January 17, 2022

UPCOMING IPOs								
Ticker	IPO Size (mn)	GP Quota	Quota(Shares)	Min.Inv	Cut of Date	Offer Price	Subs. Open	Subs. Close
n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a

UPCOMING DIVIDENDS							
Ticker	Period	Cash Div	Bonus Div	EPS (BDT)	NAVPS (BDT)	Record Date	AGM Date
EASTRNLU	FY 2021	140%	20.00%	52.18	229.36	18-01-22	12-03-22
PADMAOIL	FY 2021	125%	-	23.27	174.16	20-01-22	26-02-22
DACCADYE	FY 2021	2%	-	0.6	34.47	03-02-22	14-03-22

TODAY'S TOP BLOCK TRANSACTIONS				UPCOMING BOARD MEETING DATE		
Ticker	Volume ('000)	Value (mn)	Price Range	Ticker	Period	Meeting Date
PTL	887.6	92.7	103.8 - 105	SSSTEEL	Q1'2022	17-Jan-22
FORTUNE	350.1	41.9	115 - 120	ANLIMAYARN	Q2'2022	17-Jan-22
GENEXIL	171.0	27.7	162 - 164	MHSML	Q2'2022	18-Jan-22
SAIFPOWER	352.5	15.2	41.8 - 45	TALLUSPIN	FY 2019, FY 2020, FY 2021	19-Jan-22
BEACONPHAR	57.5	12.8	222.1 - 222.1	DOREENPWR	Q2'2022	19-Jan-22
PRIMELIFE	130.0	10.6	81.2 - 81.2	AZIZPIPES	Q2'2022	19-Jan-22
SONARBAINS	142.0	9.9	70 - 70	WALTONHIL	Q2'2022	19-Jan-22
BEXIMCO	56.0	8.8	155 - 158	IBNSINA	Q2'2022	20-Jan-22
GBBPOWER	200.0	7.2	36 - 36	SINGERBD	FY 2021	25-Jan-22
ASIANS	67.0	6.9	103.7 - 103.7	ESQUIRENIT	Q2'2022	30-Jan-22
SHEPHERD	228.0	6.6	29.1 - 29.1			
AIL	107.0	6.1	57.1 - 57.1			
RDFOOD	100.0	5.6	56.2 - 56.2			
ORIONPHARM	50.0	5.0	96 - 101.5			
PROVATIINS	42.9	4.9	112 - 115			
NAHEEACP	92.1	4.2	45.4 - 45.4			
BSC	22.0	2.9	131 - 132			
LOVELLO	52.0	2.6	48 - 50.5			
GPHISPAT	40.0	2.5	62.5 - 62.5			
RAKCERAMIC	36.0	2.3	64.4 - 65.8			
SAMORITA	20.0	2.3	115.2 - 116.9			
DELTALIFE	11.5	2.3	197 - 206.8			
ORIONINFU	21.0	2.1	94.9 - 101			
ACTIVEFINE	65.0	2.0	31 - 31			
DOREENPWR	30.0	2.0	67 - 67			
KAY&QUE	4.0	1.2	295 - 295			
PROGRESLIF	10.0	1.0	103 - 105			
FAREASTLIF	10.0	1.0	97 - 97			
ANWARGALV	1.8	0.8	440 - 440			
RUPALIINS	16.0	0.7	46 - 46			
GSPFINANCE	20.0	0.6	29.5 - 29.5			
BBSCABLES	10.0	0.6	55.1 - 55.1			
REPUBLIC	10.7	0.6	51.6 - 51.6			
EASTRNLU	0.2	0.5	3160.1 - 3160.1			
PADMALIFE	10.0	0.5	53 - 53			
SIBL	31.0	0.5	16.7 - 16.7			
SPCL	5.6	0.5	91.8 - 91.8			
SONALILIFE	6.9	0.5	73 - 73			
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DSE NEWS IN BRIEF

BBSCABLES: Sale Confirmation of a Corporate Director: Bangladesh Building Systems Ltd., one of the Corporate Directors of the Company, has further reported that it has completed its sale of 11,00,000 shares of the Company at prevailing market price through Chittagong Stock Exchange as per declaration disseminated on 12.01.2022.

GENERAL DISCLOSURE

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