Daily Market Review

Market closed flat

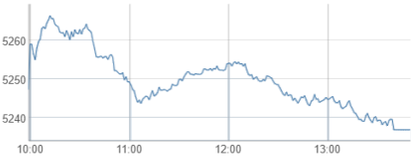
2-Mar-2025

DSEX WENT DOWN BY 10.45 POINTS

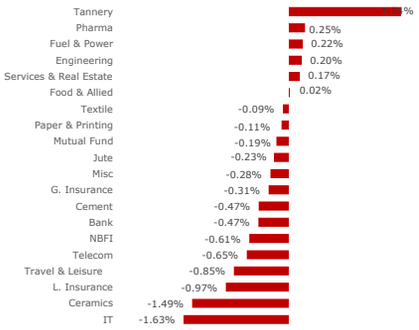
Market closed flat today with decrease in turnover. Broad index DSEX went down by 10.45 points. Tannery, Pharma, and Fuel & Power are the top three sectors that closed positive today while IT, Ceramics, and Life Insurance are the top three sectors that closed negative.

Turnover decreased by 13.51% to BDT 4.2bn. Textile sector dominated the turnover chart covering 13.96% of the total turnover.

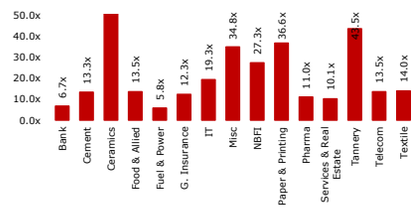
Intraday Performance of DSEX



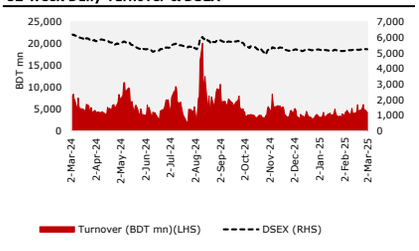
Sector Return



Sector P/E



52 Week Daily Turnover & DSEX



Index

Particulars	Value	Δ Points	Daily Δ %	Dec'24 Value	YTD Δ %
DSEX	5,236.85	(10.45)	-0.20%	5,216.44	0.39%
DS30	1,903.68	(1.87)	-0.10%	1,939.73	-1.86%
DSES	1,166.56	(0.44)	-0.04%	1,168.90	-0.20%
S&P 500	5,954.50	92.93	1.59%	5,881.63	1.24%
Nikkei 225	37,155.50	(1,100.67)	-2.88%	39,894.54	-6.87%
FTSE 100	8,809.74	53.53	0.61%	8,132.56	8.33%

Market Statistics

Particulars	Today	Last Day	Daily Δ	Daily Δ %	60 Day MA
Turnover (BDT mn)	4,220	4,879	-659	-13.51%	3,911
Turnover (USD mn)	35	40	-5	-13.51%	33
Volume (mn)	156	204	-48	-23.62%	151
Market Cap (BDT bn)	6,926	6,954	-27	-0.39%	
Market Cap (USD bn)	57	57	0	-0.39%	
Market P/E (x)	10.8				

Particulars	Gainer	Loser	Unchanged
Market Breadth	144	184	67

Sector Statistics

Sector	Market Cap (BDTmn)	% of total Market Cap	Sector Return	Turnover (BDTmn)	% of total Turnover
Bank	683,812	19.34%	-0.5%	356.1	8.44%
Telecom	612,627	17.33%	-0.6%	101.6	2.41%
Pharma	539,943	15.27%	0.3%	542.2	12.85%
Fuel & Power	293,308	8.30%	0.2%	204.6	4.85%
Food & Allied	292,322	8.27%	0.0%	433.3	10.27%
Engineering	283,531	8.02%	0.2%	530.2	12.57%
Misc	238,830	6.76%	-0.3%	186.4	4.42%
Textile	123,776	3.50%	-0.1%	589.2	13.96%
NBFI	104,751	2.96%	-0.6%	85.5	2.03%
Cement	88.024	2.49%	-0.5%	22.0	0.52%
G. Insurance	72,771	2.06%	-0.3%	77.2	1.83%
L. Insurance	46.410	1.31%	-1.0%	104.5	2.48%
IT	27,152	0.77%	-1.6%	193.1	4.58%
Mutual Fund	26,385	0.75%	-0.2%	164.6	3.90%
Tannery	22,393	0.63%	1.7%	88.5	2.10%
Paper & Printing	21,952	0.62%	-0.1%	251.9	5.97%
Travel & Leisure	19,326	0.55%	-0.8%	43.2	1.02%
Services & Real Estate	18,124	0.51%	0.2%	42.8	1.02%

Top Turnover

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
ORIONINFU	394.40	0.05%	210.04	0.53	191.46
INTRACO	22.80	7.04%	101.07	4.55	15.62
RDFOOD	28.60	5.93%	100.31	3.61	21.67
RELIANCE1	22.70	-2.99%	97.52	4.37	49.35
KDSALTD	42.80	4.90%	96.98	2.31	20.38

Top Gainers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
HRTEX	40.00	9.89%	50.43	1.27	n/a
FORTUNE	20.10	9.84%	60.14	3.03	50.25
RSRMSTEEL	13.60	9.68%	2.48	0.18	n/a
SAFKOSPINN	12.90	9.32%	7.24	0.56	n/a
SHURWID	9.40	9.30%	2.83	0.30	3.73

Top Losers

Ticker	Close Price (BDT)	Daily Δ %	Turnover (BDTmn)	Volume (mn)	P/E (x)
SPCERAMICS	16.10	-9.04%	77.05	4.61	n/a
KPPL	24.10	-7.66%	28.39	1.14	n/a
ADNTEL	88.00	-6.08%	60.57	0.67	27.85
FUWANGFOOD	16.00	-5.88%	68.43	4.17	n/a
MIDLANDBNK	19.90	-5.69%	56.52	2.79	27.64

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RINGSHINE

Q2 Financials

EPS was Tk. (0.71) for October-December 2024 as against Tk. (0.55) for October-December 2023; EPS was Tk. (1.50) for July-December 2024 as against Tk. (1.41) for July-December 2023. NOCFPS was Tk. (0.90) for July-December 2024 as against Tk. (0.36) for July-December 2023. NAV per share was Tk. (9.50) as on December 31, 2024 and Tk. (8.03) as on June 30, 2024.

INTRACO

Board decision to transfer all investment with Intraco Automobiles Ltd.

The company in its Board of Directors Meeting held on February 27, 2025 decided that one of their subsidiary company "Intraco Automobiles Ltd." completed its lease tenure with the Station Land Owner and they do not want to continue the operation of the CNG station from 1st week of March 2025. In this regard the Board of Directors of the company decided to transfer all the investment with Intraco Automobiles Ltd. to their Bhola Non-Pipe Gas Line Unit (IRSPLC).

Block Trade

Ticker	Max Price (BDT)	Min Price (BDT)	No. of Trades	Volume	Value (BDTmn)
ACI	156.1	156	2	27000	4.214
AGNISYSL	28.5	28.5	1	132377	3.773
AL-HAJTEX	148	145	14	251628	36.529
BBS	12.9	12.9	1	55000	0.71
BEACHHATCH	105	105	3	300000	31.5
BERGERPBL	1847	1847	1	1729	3.193
BRACBANK	52.3	52.3	1	15300	0.8
BSCPLC	120.1	120.1	1	4165	0.5
CITYGENINS	36	36	2	131000	4.716
DSSL	12.3	12.3	1	60000	0.738
EBL	26.1	26.1	1	1697388	44.302
FEKDIL	18.6	18.6	1	30000	0.558
FINEFOODS	200	200	1	4023	0.805
GPHISPAT	23.3	23.3	1	200000	4.66
IFIC	8.3	8.3	1	62000	0.515
ISLAMIBANK	47	47	1	50000	2.35
ISNLTD	41.4	41.4	1	14884	0.616
KDSALTD	41.1	37.3	7	513202	20.948
LOVELLO	82.1	82.1	2	24000	1.97
MALEKSPIN	27	27	2	63500	1.714
MONNOCERA	87.1	87.1	1	10000	0.871
MPETROLEUM	187.9	187.9	1	2993	0.562
NAVANAPHAR	57	57	1	9500	0.541
NRBBANK	12.7	12.7	1	188839	2.398
ONEBANKPLC	8.1	8.1	1	228217	1.849
ORIONINFU	395	360	2	7870	2.938
PEOPLESINS	31.2	31.2	2	156500	4.883
POWERGRID	32.2	32.2	1	90000	2.898
RELIANCE1	22.6	21.1	6	1085001	23.288
ROBI	29	29	2	44000	1.276
RUNNERAUTO	28.8	28.8	1	125000	3.6
SEMLLECMF	6.8	6.8	2	500000	3.4
SILCOPHL	17.3	17.3	1	42700	0.739
SONARGAON	46.5	46.5	2	26500	1.232
SOUTHEASTB	8.9	8.9	4	732500	6.519
SPCL	31.1	31.1	1	29419	0.915
SQURPHARMA	225.5	216.2	2	29400	6.444
SUNLIFEINS	74.8	74.8	1	9449	0.707
TOSRIFA	25.6	25.6	1	33000	0.845
UNITEDFIN	13.8	13.8	1	160000	2.208
UNITEDINS	37	37	1	25000	0.925
WATACHEM	117	117	1	29000	3.393

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Expected absolute returns are calculated as the % of difference between our target price and latest close price. Stock recommendations are based on absolute upside (downside) and have a 12-month horizon. Please note that future price fluctuations could lead to a temporary mismatch between upside/downside for a stock and our recommendation.

Recommendation Type	Holding period (if not otherwise mentioned)	Absolute Return Potential
Buy	12 Months	More than +15%
Neutral/ Hold	12 Months	Between -5% and +15%
Underweight	12 Months	Less than -5%

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