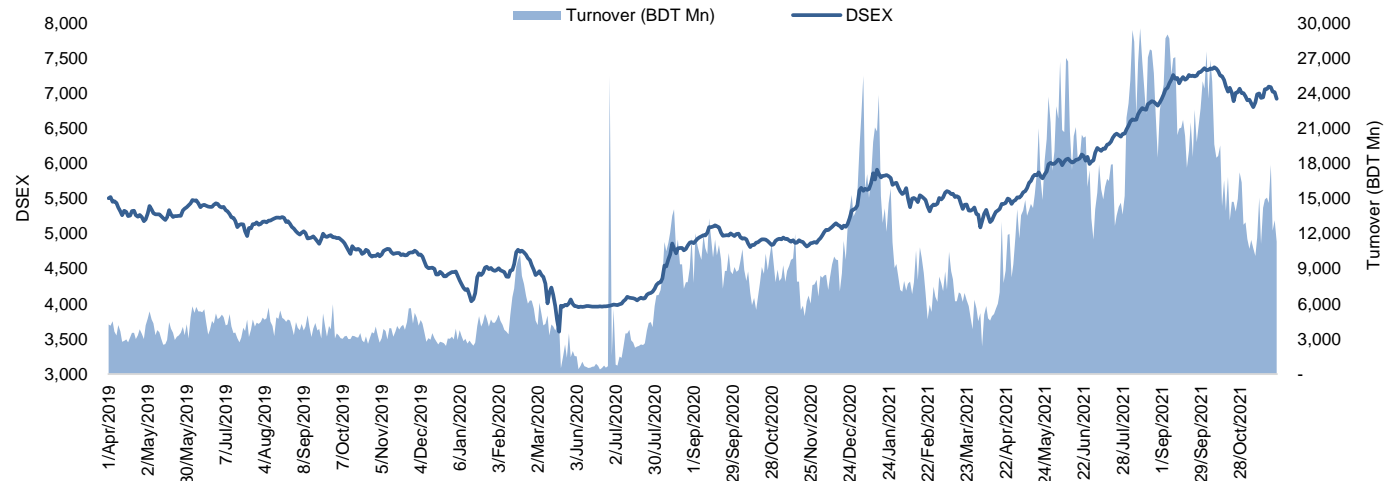


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.36%) lost 95.09 points and closed at 6,917.92. The blue-chip index DS30 (-1.11%), the Shariah-based index DSES (-1.13%), and the large-cap index CDSET (-1.15%) closed at 2,631.37, 1,452.01, and 1,413.30 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 2.50% followed by NBF1 (-1.20%), Pharmaceutical (-1.08%), Engineering (-1.06%), Food & Allied (-0.78%), Fuel & Power (-0.59%), and Telecommunication (-0.36%), respectively. Block trades contributed 0.6% of the overall market turnover. One Bank Limited (-1.1%) was the most traded share with a turnover of BDT 1,087 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,917.92	7,013.00	-95.09	-1.36%	+28.1%
DS30	2,631.37	2,660.86	-29.48	-1.11%	+34.0%
DSES	1,452.01	1,468.58	-16.57	-1.13%	+16.9%
CDSET	1,413.30	1,429.80	-16.50	-1.15%	+25.8%

	Advanced	Declined	Unchanged	Total
All Category	75	259	31	365
A Category (Equity)	48	208	18	274
B Category (Equity)	15	30	10	55
N Category (Equity)	3	8	0	11
Z Category (Equity)	9	13	3	25
Mutual Funds	1	27	8	36
Corporate Bonds	0	0	0	0

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,497,397	5,549,111	-0.9%
	Mn USD	64,523	65,130	
Turnover	Mn BDT	11,296	13,146	-14.1%
	Mn USD	133	154	
Volume	Mn Shares	364	399	-8.8%
No. of Trade		165,731	181,255	-8.6%

Figure: Sectorial Turnover (BDT)

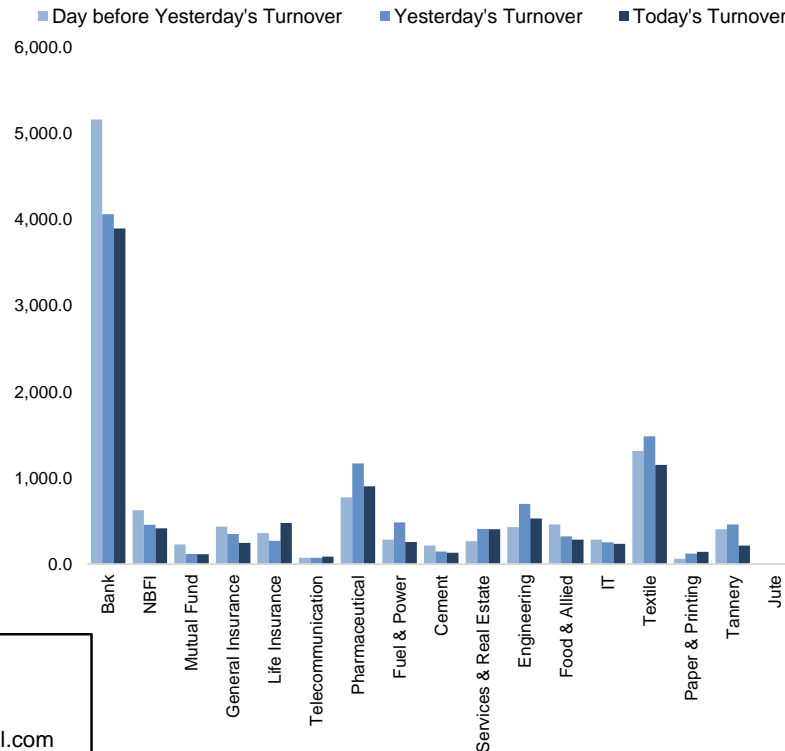
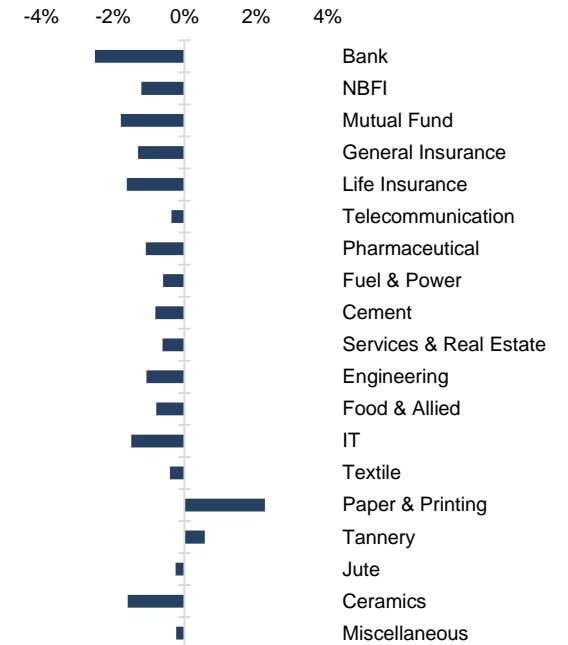


Figure: Sectorial Mcap Change



Market PE 17.0x
Market PB 1.9x

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Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,702	1,745	-43.58	-2.50%	32	759,957	15.5%	3,892.0	36.4%	8.4x	0.9x	GP	486,513	9.9%	22.7	13.4x	11.7x
NBFI	2,327	2,355	-28.21	-1.20%	23	227,339	4.6%	414.2	3.9%	21.5x	4.0x	WALTONHIL	342,460	7.0%	6.6	22.5x	3.7x
Mutual Fund	950	967	-17.21	-1.78%	37	43,102	0.9%	114.2	1.1%	NM	0.8x	BATBC	339,822	6.9%	108.0	24.8x	8.5x
General Insurance	5,482	5,554	-71.68	-1.29%	39	127,339	2.6%	245.7	2.3%	20.0x	2.2x	ROBI	203,756	4.2%	30.7	88.7x	3.1x
Life Insurance	2,882	2,929	-47.21	-1.61%	13	76,719	1.6%	477.9	4.5%	NM	NM	SQURPHARMA	194,665	4.0%	151.9	11.4x	2.0x
Telecommunication	5,962	5,984	-21.74	-0.36%	3	719,391	14.7%	86.5	0.8%	17.7x	6.2x	BEXIMCO	152,304	3.1%	1,069.2	15.1x	2.1x
Pharmaceutical	3,931	3,974	-42.83	-1.08%	32	724,616	14.8%	902.4	8.4%	19.2x	2.7x	UPGDCL	148,518	3.0%	31.5	13.7x	4.2x
Fuel & Power	1,776	1,787	-10.56	-0.59%	23	474,293	9.7%	256.9	2.4%	11.8x	1.2x	RENATA	139,769	2.9%	14.6	26.8x	5.2x
Cement	2,579	2,600	-21.00	-0.81%	7	133,629	2.7%	132.3	1.2%	18.5x	2.7x	BXPBARMA	96,896	2.0%	180.1	17.6x	2.5x
Services & Real Estate	1,427	1,436	-8.74	-0.61%	8	53,584	1.1%	403.8	3.8%	NM	1.0x	ICB	94,844	1.9%	6.7	67.1x	2.1x
Engineering	4,635	4,685	-49.55	-1.06%	42	554,794	11.3%	530.2	5.0%	18.4x	2.1x	LHBL	88,381	1.8%	110.9	22.4x	4.6x
Food & Allied	25,657	25,860	-202.84	-0.78%	20	438,380	9.0%	285.2	2.7%	30.0x	8.8x	BERGERPBL	82,274	1.7%	1.5	26.4x	6.9x
IT	3,436	3,488	-51.73	-1.48%	11	41,885	0.9%	236.1	2.2%	35.8x	3.0x	BRACBANK	74,481	1.5%	144.6	13.0x	1.5x
Textile	1,575	1,582	-6.31	-0.40%	58	162,602	3.3%	1,152.1	10.8%	35.0x	1.0x	MARICO	72,154	1.5%	7.2	21.9x	30.7x
Paper & Printing	8,003	7,827	+175.95	+2.25%	6	21,857	0.4%	143.0	1.3%	NM	1.6x	DUTCHBANGL	53,067	1.1%	89.9	9.1x	1.5x
Tannery	3,335	3,316	+19.00	+0.57%	6	33,957	0.7%	216.2	2.0%	NM	3.4x	BEACONPHAR	51,398	1.1%	16.7	50.9x	9.8x
Jute	8,355	8,376	-20.47	-0.24%	3	1,854	0.0%	2.1	0.0%	NM	18.7x	ISLAMIBANK	50,715	1.0%	9.8	9.4x	0.8x
Ceramics	659	670	-10.61	-1.58%	5	31,245	0.6%	44.8	0.4%	32.0x	2.0x	SUMITPOWER	42,074	0.9%	32.7	7.9x	1.1x
Miscellaneous	5,154	5,166	-11.75	-0.23%	14	264,978	5.4%	1,166.4	10.9%	19.0x	2.4x	POWERGRID	38,844	0.8%	31.1	11.7x	0.4x
												EBL	36,628	0.7%	7.7	6.8x	1.2x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SHURWID	15.5	+9.9%	16.5	7.1x	1.2x
ACMEPL	23.3	+9.9%	0.0	14.2x	1.2x
SKICL	37.2	+9.7%	0.6	14.0x	2.0x
TOSRIFA	20.6	+9.6%	25.7	30.3x	0.7x
MITHUNKNIT	12.4	+8.8%	2.0	NM	0.7x
MONNOFABR	18.6	+6.9%	6.1	NM	0.7x
MICEMENT	70.0	+6.4%	4.8	12.0x	1.3x
ICBSONALI1	8.4	+5.0%	2.6	NM	1.2x
ZEALBANGLA	116.0	+5.0%	0.0	NM	NM
PDL	12.9	+4.9%	66.2	100.0x	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LRGLOBMF1	8.1	-10.0%	0.5	NM	0.9x
KTL	34.1	-9.1%	74.2	72.4x	2.0x
PREMIERLEA	9.2	-8.9%	16.6	NM	0.6x
GEMINISEA	222.9	-8.0%	27.0	37.0x	89.5x
HFL	27.2	-6.8%	19.5	NM	0.7x
TAMIJTEX	122.6	-6.6%	0.8	43.8x	1.5x
BIFC	6.5	-5.8%	0.7	NM	NM
ADNTEL	56.5	-5.5%	10.0	21.8x	2.1x
PF1STMF	9.2	-5.2%	7.3	NM	1.6x
IFIC	19.2	-5.0%	678.5	15.8x	1.1x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	127,369	6.9%	11.4x	2.0x
BEXIMCO	105,775	5.7%	15.1x	2.1x
BATBC	89,883	4.9%	24.8x	8.5x
RENATA	68,235	3.7%	26.8x	5.2x
BXPBARMA	67,652	3.7%	17.6x	2.5x
GP	48,651	2.6%	13.4x	11.7x
BRACBANK	40,041	2.2%	13.0x	1.5x
BEACONPHAR	35,977	1.9%	50.9x	9.8x
LHBL	31,216	1.7%	22.4x	4.6x
EBL	25,574	1.4%	6.8x	1.2x
ISLAMIBANK	24,689	1.3%	9.4x	0.8x
IFIC	20,619	1.1%	15.8x	1.1x
CITYBANK	20,343	1.1%	6.8x	0.9x
ROBI	20,274	1.1%	88.7x	3.1x
OLYMPIC	19,466	1.1%	17.1x	3.3x
PUBALIBANK	19,373	1.0%	5.3x	0.7x
NBL	17,998	1.0%	7.1x	0.5x
ALARABANK	16,714	0.9%	10.4x	1.2x
DELTALIFE	16,403	0.9%	NM	NM
ORIONPHARM	15,678	0.8%	28.2x	1.2x

*NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ONEBANKLTD	18.5	-1.1%	1,087.4	9.4x	1.0x
BEXIMCO	173.8	-0.5%	1,069.2	15.1x	2.1x
IFIC	19.2	-5.0%	678.5	15.8x	1.1x
FIRSTSBANK	14.4	-2.7%	538.7	5.1x	0.8x
DELTALIFE	209.2	-1.3%	427.1	NM	NM
PTL	94.3	-1.3%	365.5	22.7x	3.5x
SAIFPOWER	43.0	-0.7%	275.4	24.0x	2.6x
NRBCBANK	31.0	-4.9%	224.1	12.1x	1.9x
FORTUNE	97.7	+0.7%	209.3	41.9x	6.6x
BXPBARMA	217.2	-1.5%	180.1	17.6x	2.5x

Block Trade	Maximum Price (BDT)	Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
RENATA	1,300.0	1,300.0	3.0	110	143.00
LANKABAFIN	40.8	40.8	1.0	3,000	122.40
BDFINANCE	58.3	58.3	1.0	1,600	93.28
DELTALIFE	205.0	199.1	2.0	303	62.15
SALVOCHEM	61.0	54.2	4.0	1,010	58.07
KTL	41.0	36.0	10.0	657	25.55
BATASHOE	867.9	867.9	2.0	22	18.66
BRACBANK	56.5	54.0	4.0	250	13.89
SHAHJABANK	23.8	23.8	3.0	342	8.14
MAKSONSPIN	21.6	21.6	1.0	369	7.96

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
RENATA	1,300.0	1,300.0	143.0	110	3
LANKABAFIN	40.8	40.8	122.4	3,000	1
BDFINANCE	58.3	58.3	93.3	1,600	1
DELTALIFE	205.0	199.1	62.1	303	2
SALVOCHEM	61.0	54.2	58.1	1,010	4
KTL	41.0	36.0	25.5	657	10
BATASHOE	867.9	867.9	18.7	22	2
BRACBANK	56.5	54.0	13.9	250	4
SHAHJABANK	23.8	23.8	8.1	342	3
MAKSONSPIN	21.6	21.6	8.0	369	1
PTL	86.0	86.0	6.9	80	1
SONALIPAPR	627.0	551.0	5.8	10	2
NEWLINE	39.3	39.2	4.2	107	3
NRBCBANK	35.5	33.5	2.8	80	4
GREENDELMF	7.9	7.9	2.5	311	1
MERCANBANK	21.1	21.1	2.1	100	1
SAIFPOWER	44.5	40.9	2.0	47	2
FORTUNE	105.9	95.0	1.9	19	2
GBBPOWER	35.7	35.5	1.6	45	2
BEACONPHAR	235.0	235.0	1.4	6	1
AIL	42.1	42.1	1.3	30	1
WALTONHIL	1,210.0	1,210.0	1.2	1	1
Total			593.4		63

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
CVO Petrochemical Refinery Limited	-	10.0%	0.0%	Record Date	25-Nov-21
Queen South Textile Mills Limited	-	0.0%	10.0%	Record Date	25-Nov-21
SK Trims & Industries Limited	-	0.0%	5.0%	Record Date	25-Nov-21
Far Chemical Industries Limited	-	0.0%	1.0%	Record Date	25-Nov-21
M.L. Dyeing Limited	-	0.0%	10.0%	Record Date	25-Nov-21
Global Heavy Chemicals Limited	-	0.0%	5.0%	Record Date	25-Nov-21
Associated Oxygen Limited	-	7.0%	5.0%	Record Date	25-Nov-21
Hwa Well Textiles (BD) Limited	-	0.0%	20.0%	Record Date	25-Nov-21
Prime Textile Spinning Mills Limited	-	0.0%	2.0%	Record Date	25-Nov-21
S. Alam Cold Rolled Steels Ltd.	-	0.0%	10.0%	Record Date	25-Nov-21
Central Pharmaceuticals Limited	-	0.0%	0.0%	Record Date	25-Nov-21
GBB Power Ltd.	-	0.0%	11.5%	Record Date	25-Nov-21
Information Services Networks Limited	-	0.0%	0.0%	Record Date	25-Nov-21
Khulna Printing & Packaging Limited	-	0.0%	0.0%	Record Date	25-Nov-21
Jute Spinners Ltd	-	0.0%	0.0%	Record Date	25-Nov-21
R.N. Spinning Mills Limited	-	0.0%	0.0%	Record Date	25-Nov-21

Important DSE News
PREMIERLEA

The Board of Directors has recommended No dividend for the year ended on December 31, 2020. Date of AGM: 30.12.2021, Time: 11:00 AM, Venue: Digital Platform. Record Date: 14.12.2021. The Company has also reported Consolidated EPS of Tk. (2.93), Consolidated NAV per share of Tk. 16.03 and Consolidated NOCFPS of Tk. 3.26 for the year ended on December 31, 2020 as against Tk. 0.17, Tk. 18.96 and Tk. 3.08 respectively for the same period of the previous year.

SILCOPHL

The Board of Directors has recommended 10% cash dividend for all shareholders excluding Directors for the year ended on June 30, 2021. The Directors hold 4,02,78,370 shares out of total 10,38,07,000 shares of the Company and the cash dividend to be payable to the General shareholders, Independent Directors and Sponsors only is Tk. 6,35,28,630.00. Date of AGM: 16.01.2022, Time: 11:30 AM, Venue: Digital Platform. Record Date: 20.12.2021. The Company has reported EPS of Tk. 0.82, NAV per share of Tk. 21.85 and NOCFPS of Tk. 2.48 the year ended on June 30, 2021 as against Tk. 0.80, Tk. 21.64 and Tk. 1.41 respectively for the same period of the previous year.

NRBCBANK

The Company has informed that Bangladesh Securities and Exchange Commission has approved Unsecured, Non-convertible, Fully Redeemable, Floating Rate, Subordinated Bond of BDT 300,00,00,000.00 (BDT Three Hundred Crore) @ per unit face value of BDT 1,00,00,000.00 (BDT One Crore) in favor of NRB Commercial Bank Limited for raising Tier-II Capital through private placement among Institutional Investors and Individuals.

ABBANK

The Company has informed that Bangladesh securities and Exchange Commission (BSEC) has accorded its consent to AB Bank Limited for raising Additional Tier-I (AT-I) capital through issuance of Transferrable, Unsecured, Non-Cumulative, Contingent-Convertible AB Bank Perpetual Bonds of BDT 600 crore of which BDT 540 crore through Private Placement and BDT 60 crore through Public Issue with a face value of BDT 1,000 each. Interest rate of the said bonds is 20-years Treasury-Bond rate plus 2.0% margin p.a. with a coupon floor rate of 6% p.a. and coupon ceiling rate of 10.0% p.a. The consent has been accorded subject to the compliance of relevant laws and regulatory requirements.

FASFIN

As per Regulation 16(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Directors will be held on November 30, 2021 at 3:00 PM to consider, among others, un-audited financial statements of the Company for the Third Quarter (Q3) period ended on September 30, 2021.

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