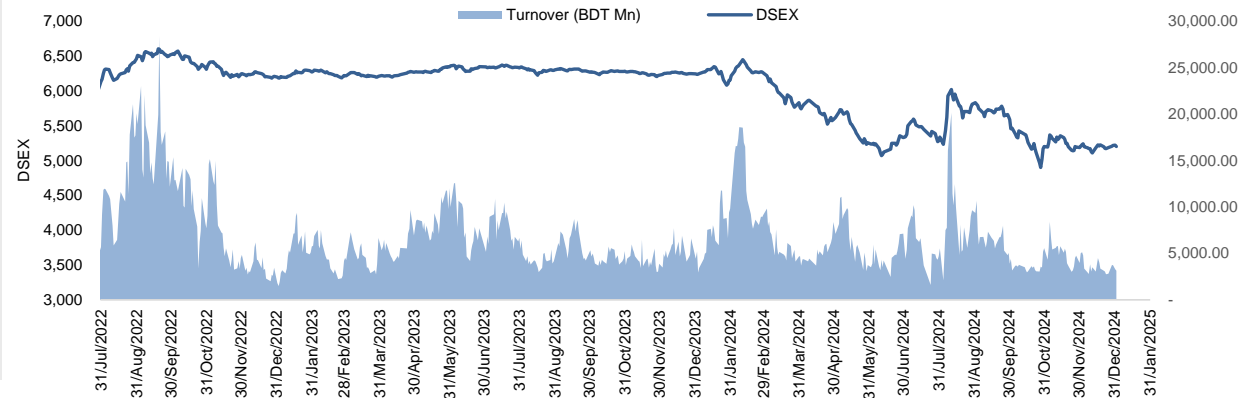


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.36%) lost 18.54 points and closed at 5,199.62. The blue-chip index DS30 (-0.56%), the Shariah-based index DSES (-0.86%), and the large-cap index CDSET (-0.25%) closed at 1,930.97, 1,155.10, and 1,065.48 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 1.48% followed by NBF1 (-1.20%), Fuel & Power (-1.01%), Telecommunication (-0.62%), Pharmaceutical (-0.59%), Engineering (-0.14%), and Bank (+1.63%), respectively. Block trades contributed 2.6% of the overall market turnover. Robi Axiata Limited (-1.4%) was the most traded share with a turnover of BDT 122 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,199.62	5,218.16	-18.54	-0.36%	-0.3%
DS30	1,930.97	1,941.94	-10.97	-0.56%	-0.5%
DSES	1,155.10	1,165.07	-9.97	-0.86%	-1.2%
CDSET	1,065.48	1,068.15	-2.67	-0.25%	-0.1%

	Advanced	Declined	Unchanged	Total
All Category	98	229	71	398
A Category (Equity)	45	138	37	220
B Category (Equity)	23	55	14	92
N Category (Equity)	0	4	0	4
Z Category (Equity)	30	32	20	82
Mutual Funds	6	9	22	37
Corporate Bonds	0	2	0	2
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,629,514	6,639,053	-0.1%
Mn USD	54,340	54,418	
Turnover			
Mn BDT	3,137	3,306	-5.1%
Mn USD	26	27	
Volume			
Mn Shares	133	116	+14.8%
No. of Trade	102,837	101,540	+1.3%

* Average Interbank Exchange Rate is BDT 122.00 as of Jan 02, 2025

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Figure: Sectorial Turnover (BDT Mn)

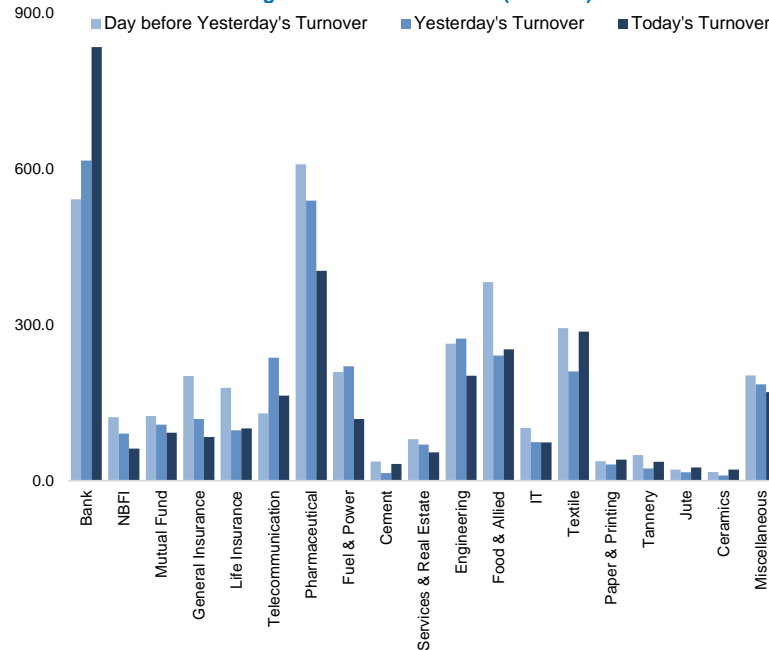
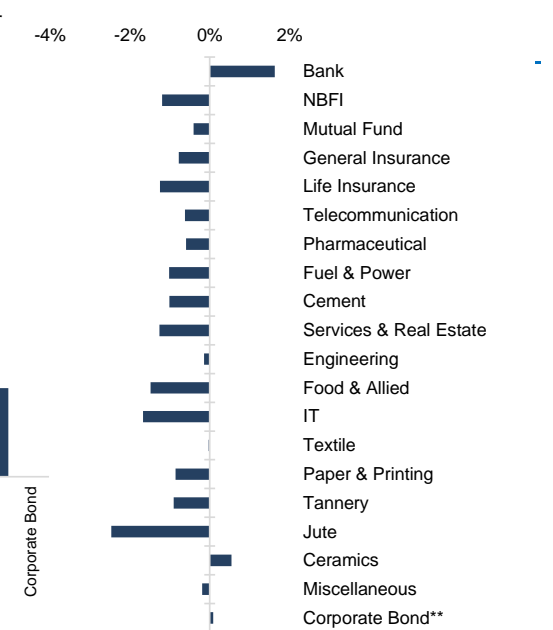


Figure: Sectorial Mcap Change



Market PE 14.7x
Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

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	1,470	1,446	+23.60	+1.63%	36	695,433	10.5%	833.7	27.3%	9.0x	0.7x	GP	437,767	12.1%	32.0	12.4x	7.6x
NBFI	1,181	1,195	-14.29	-1.20%	23	112,558	1.7%	62.0	2.0%	NM	NM	BATBC	194,400	5.4%	49.6	11.1x	3.2x
Mutual Fund	598	600	-2.44	-0.41%	37	27,465	0.4%	92.5	3.0%	NM	0.5x	SQURPHARMA	192,005	5.3%	18.4	9.1x	1.4x
General Insurance	2,733	2,754	-21.33	-0.77%	43	78,016	1.2%	84.1	2.8%	14.1x	1.2x	ROBI	151,900	4.2%	121.8	27.6x	2.3x
Life Insurance	1,785	1,808	-22.55	-1.25%	15	47,487	0.7%	100.5	3.3%	NM	NM	WALTONHIL	148,102	4.1%	3.4	11.4x	1.3x
Telecommunication	5,225	5,257	-32.70	-0.62%	3	612,636	9.2%	163.5	5.4%	14.5x	4.3x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,930	2,948	-17.40	-0.59%	34	555,496	8.4%	403.3	13.2%	14.1x	1.5x	BRACBANK	89,370	2.5%	58.9	8.1x	1.2x
Fuel & Power	1,099	1,110	-11.26	-1.01%	23	291,162	4.4%	118.4	3.9%	14.2x	0.6x	BERGERPBL	84,500	2.3%	0.0	25.4x	5.3x
Cement	1,927	1,947	-19.72	-1.01%	7	91,852	1.4%	32.3	1.1%	15.4x	2.0x	ISLAMIBANK	81,949	2.3%	65.1	17.6x	1.1x
Services & Real Estate	1,009	1,022	-12.91	-1.26%	9	55,509	0.8%	54.8	1.8%	18.5x	0.4x	MARICO	72,929	2.0%	7.3	13.8x	9.6x
Engineering	2,497	2,501	-3.60	-0.14%	42	281,685	4.2%	202.0	6.6%	12.3x	0.9x	UPGDCL	71,708	2.0%	1.5	6.9x	1.9x
Food & Allied	16,919	17,173	-254.19	-1.48%	21	309,566	4.7%	252.6	8.3%	16.6x	4.4x	LHB	61,437	1.7%	25.3	15.2x	3.0x
IT	1,954	1,987	-33.19	-1.67%	11	25,773	0.4%	73.9	2.4%	19.0x	1.6x	ICB	52,816	1.5%	20.6	27.2x	1.2x
Textile	1,089	1,089	-0.27	-0.02%	58	113,378	1.7%	286.8	9.4%	NM	0.8x	UNILEVERCL	49,223	1.4%	0.4	67.0x	20.9x
Paper & Printing	3,963	3,998	-34.30	-0.86%	6	17,906	0.3%	40.3	1.3%	NM	0.8x	DUTCHBANGL	44,732	1.2%	11.6	7.2x	0.9x
Tannery	2,001	2,019	-18.28	-0.91%	6	22,290	0.3%	36.3	1.2%	68.2x	1.5x	POWERGRID	37,009	1.0%	6.7	NM	0.2x
Jute	13,965	14,317	-352.79	-2.46%	3	3,074	0.0%	25.8	0.8%	NM	NM	BXPHARMA	34,886	1.0%	35.5	5.8x	0.7x
Ceramics	359	357	+1.96	+0.55%	5	16,117	0.2%	21.5	0.7%	NM	1.0x	PUBALIBANK	34,589	1.0%	77.8	3.6x	0.6x
Miscellaneous	4,232	4,240	-8.07	-0.19%	15	229,793	3.5%	170.2	5.6%	42.2x	1.8x	EBL	33,274	0.9%	19.8	5.1x	0.8x
Corporate Bond**	14,351	14,338	+12.90	+0.09%	16	33,878	0.5%	0.2	0.0%	NM	NM	OLYMPIC	30,991	0.9%	12.6	16.9x	2.8x
Treasury Bond**	556	550	+5.63	+1.02%	235	3,007,909	45.4%	0.6	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
RUPALIBANK	24.4	+9.9%	31.8	17.9x	1.6x
KPPL	10.2	+9.7%	19.0	NM	NM
WMSHIPYARD	9.2	+9.5%	10.9	NM	0.6x
ONEBANKPLC	9.2	+9.5%	99.6	4.0x	0.5x
SALAMCRST	10.8	+8.0%	2.9	67.5x	0.6x
SHARPIND	24.8	+7.83%	10.2	68.9x	2.4x
GHCL	21.3	+7.6%	6.5	NM	0x
YPL	10.0	+7.5%	10.0	NM	1.9x
DUTCHBANGL	50.9	+5.8%	11.6	7.2x	0.9x
FINEFOODS	237.4	+5.8%	103.4	NM	19.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
1STPRIMFMF	26.8	-8.5%	39.3	NM	2.5x
USMANIAGL	35.2	-7.4%	0.0	NM	1x
RENWICKJA	660.0	-6.9%	0.0	NM	NM
MEGCONMILK	25.6	-6.2%	0.2	NM	NM
DAFODILCOM	58.9	-6.2%	2.8	NM	4.4x
TALLUSPIN	5.0	-3.8%	0.1	NM	0.3x
BXPHARMA	78.2	-3.7%	35.5	5.8x	0.7x
APEXTANRY	67.0	-3.5%	0.3	NM	1.6x
PHPMF1	3.1	-3.1%	0.4	NM	0.3x
POWERGRID	40.5	-3.1%	6.7	NM	0.2x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.1x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	11.1x	3.2x
RENATA	35,002	2.6%	22.8x	2.1x
ISLAMIBANK	33,649	2.5%	17.6x	1.1x
BXPHARMA	32,479	2.4%	5.8x	0.7x
BRACBANK	32,157	2.4%	8.1x	1.2x
GP	30,004	2.2%	12.4x	7.6x
LHB	24,690	1.8%	15.2x	3.0x
EBL	24,199	1.8%	5.1x	0.8x
PUBALIBANK	20,448	1.5%	3.6x	0.6x
NBL	16,930	1.2%	NM	2.7x
CITYBANK	16,830	1.2%	4.3x	0.8x
BSRMLTD	14,210	1.0%	4.7x	0.5x
ALARABANK	13,534	1.0%	12.8x	0.9x
PRIMEBANK	12,985	1.0%	4.3x	0.7x
OLYMPIC	12,616	0.9%	16.9x	2.8x
UTTARABANK	11,350	0.8%	7.5x	0.8x
ORIONPHARM	11,317	0.8%	44.0x	0.4x
ROBI	10,738	0.8%	27.6x	2.3x

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.
 ** The base of the Bond index starts at 100, starting from Jan 13, 2022
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ROBI	29.0	-1.4%	121.8	27.6x	2.3x
ORIONINFU	387.2	-0.6%	109.4	NM	24.2x
CITYBANK	23.0	+1.3%	109.4	4.3x	0.8x
FINEFOODS	237.4	+5.8%	103.4	NM	19.9x
ONEBANKPLC	9.2	+9.5%	99.6	4.0x	0.5x
PUBALIBANK	29.9	+1.4%	77.8	3.6x	0.6x
BSC	91.8	-1.7%	68.3	4.8x	0.9x
ISLAMIBANK	50.9	+0.4%	65.1	17.6x	1.1x
BRACBANK	50.5	+2.2%	58.9	8.1x	1.2x
UTTARABANK	23.0	+1.8%	56.5	7.5x	0.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
AIL	101.6	83.5	9.0	366	31.13
BSC	87.0	87.0	2.0	200	17.40
BXPHARMA	78.0	78.0	1.0	97	7.57
RENATA	679.9	679.9	1.0	8	5.44
BRACBANK	48.9	48.9	2.0	108	5.29
FINEFOODS	225.0	224.0	2.0	12	2.74
DUTCHBANGL	43.3	43.3	1.0	60	2.60
ASIATICLAB	35.9	35.7	2.0	51	1.84
EIL	57.0	57.0	1.0	16	0.91
NLTUBES	80.0	80.0	1.0	10	0.80

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
AIL	101.6	83.5	31.1	366	9
BSC	87.0	87.0	17.4	200	2
BXPHERMA	78.0	78.0	7.6	97	1
RENATA	679.9	679.9	5.4	8	1
BRACBANK	48.9	48.9	5.3	108	2
FINEFOODS	225.0	224.0	2.7	12	2
DUTCHBANGL	43.3	43.3	2.6	60	1
ASIATICLAB	35.9	35.7	1.8	51	2
EIL	57.0	57.0	0.9	16	1
NLTUBES	80.0	80.0	0.8	10	1
PROVATIINS	37.5	37.5	0.8	20	1
SQURPHARMA	216.0	216.0	0.7	3	1
1STPRIMFMF	32.0	32.0	0.7	22	1
EGEN	24.9	24.9	0.7	27	1
FORTUNE	18.0	18.0	0.6	34	1
BATBC	378.1	378.1	0.6	2	1
AOL	18.4	18.4	0.5	29	1
AMANFEED	26.0	26.0	0.5	20	1
POWERGRID	37.9	37.9	0.5	13	1
Total			81.3		31

Important DSE News

HRTEX

(Q1 Un-audited): EPS was Tk. (2.82) for July-September 2024 as against Tk. 0.94 for July-September 2023. NOCFPS was Tk. (2.72) for July-September 2024 as against Tk. 2.83 for July-September 2023. NAV per share was Tk. 18.61 as on September 30, 2024 and Tk. 21.43 as on June 30, 2024.

STANCERAM

(Q1 Un-audited): EPS was Tk. (7.14) for July-September 2024 as against Tk. (7.34) for July-September 2023; NOCFPS was Tk. (0.20) for July-September 2024 as against Tk. (8.16) for July-September 2023. NAV per share was Tk. (44.98) as on September 30, 2024 and Tk. (37.84) as on June 30, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
DACCADYE		0.0%	0%	Record Date	7-Jan-25
GEMINISEA		0.0%	8%	Record Date	7-Jan-25
AL-HAJTEX		0.0%	0%	Record Date	8-Jan-25
NBL		0.0%	0%	Record Date	16-Jan-25
HRTEX		0.0%	0%	Record Date	22-Jan-25

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