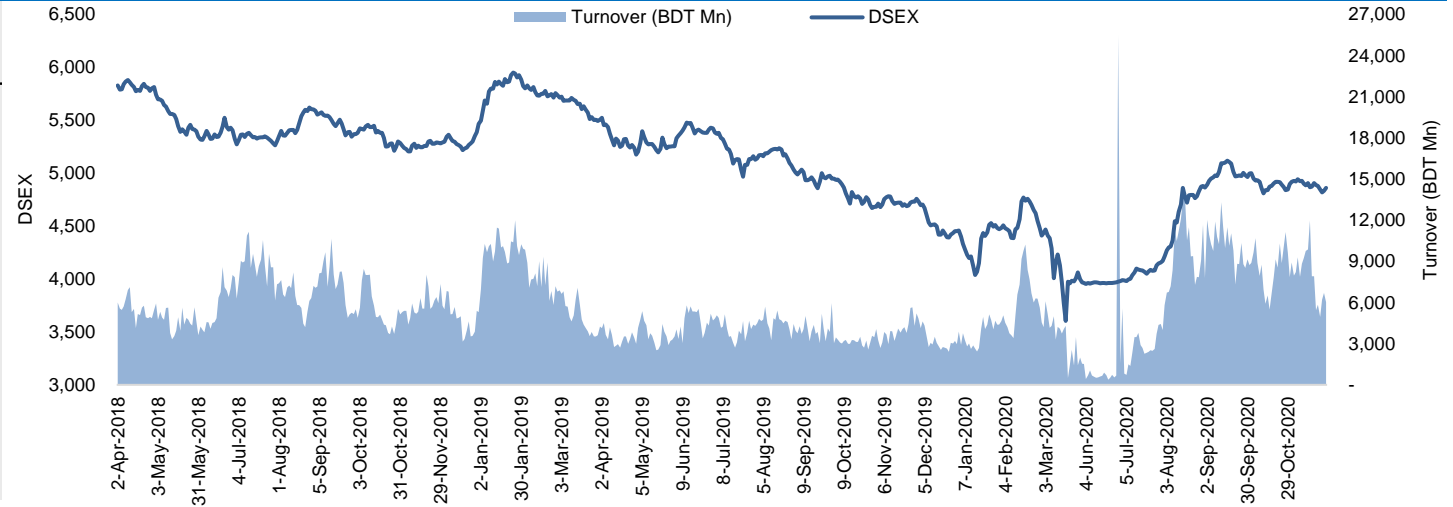


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.59%) gained 28.68 points and closed at 4,861.88. The blue-chip index DS30 (+0.43%), the Shariah-based index DSES (+0.40%), and the large-cap index CDSET (+0.37%) closed at 1,681.95, 1,117.24, and 987.33 points, respectively. All the large-cap sectors posted positive performance today except Food & Allied (-0.06%), and Engineering (-0.57%). Telecommunication booked the highest gain of 0.77% followed by NBF1 (+0.70%), Bank (+0.42%), Fuel & Power (+0.29%), and Pharmaceutical (+0.19%), respectively. Block trades contributed 2.1% of the overall market turnover. Nitel Insurance Co. Ltd. (+10.0%) was the most traded share with a turnover of BDT 249 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	4,861.88	4,833.20	+28.68	+0.59%	+9.2%
DS30	1,681.95	1,674.71	+7.24	+0.43%	+11.1%
DSES	1,117.24	1,112.83	+4.42	+0.40%	+11.7%
CDSET	987.33	983.69	+3.64	+0.37%	+9.7%

	Advanced	Declined	Unchanged	Total
All Category	142	109	91	342
A Category (Equity)	104	82	69	255
B Category (Equity)	22	10	19	51
N Category (Equity)	1	2	0	3
Z Category (Equity)	15	15	3	33
Mutual Funds	0	36	1	37
Corporate Bonds	1	1	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	3,904,475	3,893,341	+0.3%
	Mn USD	45,957	45,826	
Turnover	Mn BDT	6,027	6,710	-10.2%
	Mn USD	71	79	
Volume	Mn Shares	258	259	-0.4%
No. of Trade		140,259	128,968	+8.8%

Figure: Sectorial Turnover (BDT Mn)

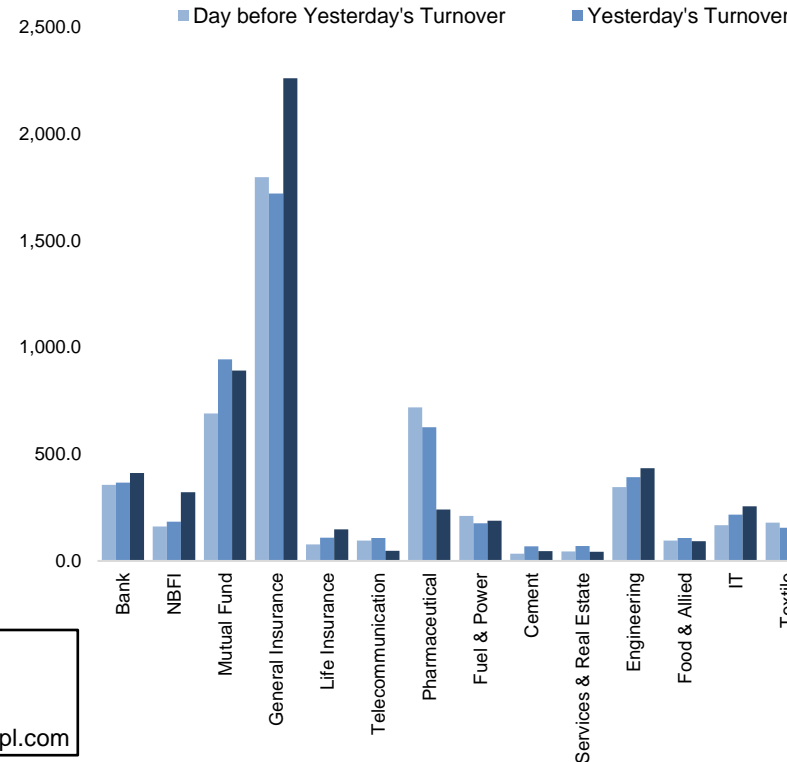
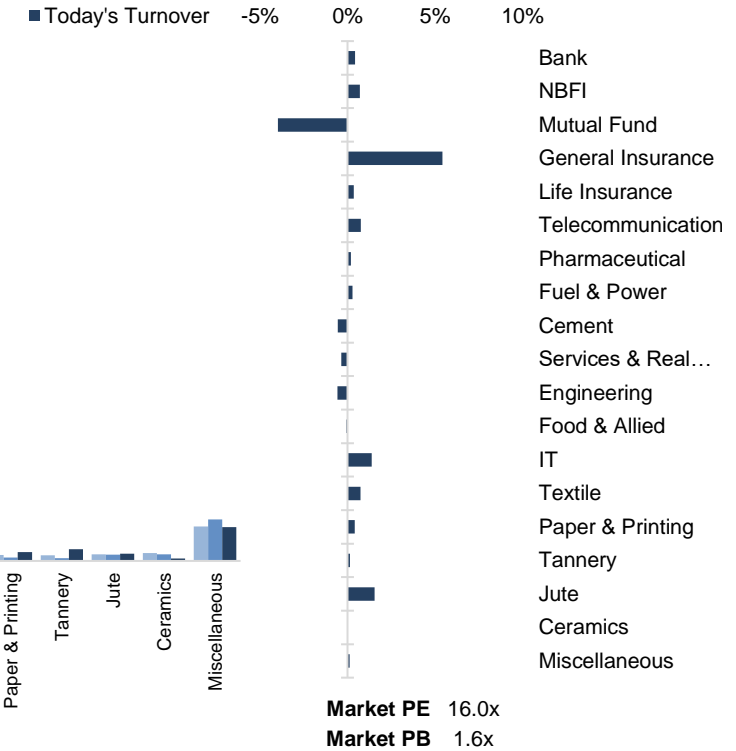


Figure: Sectorial Mcap Change



Market PE 16.0x
Market PB 1.6x

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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	1,331	1,326	+5.61	+0.42%	30	554,314	16.6%	410.7	7.0%	7.7x	0.7x	GP	433,176	12.9%	20.2	12.2x	10.3x
NBFI	1,791	1,779	+12.41	+0.70%	23	165,229	4.9%	321.6	5.5%	124.3x	2.6x	WALTONHIL	218,108	6.5%	36.6	32.1x	2.7x
Mutual Fund	919	957	-37.98	-3.97%	37	43,418	1.3%	891.3	15.1%	NM	0.9x	BATBC	185,976	5.6%	16.9	16.2x	5.0x
General Insurance	3,851	3,653	+198.26	+5.43%	36	96,736	2.9%	2,258.2	38.3%	21.4x	1.9x	SQURPHARMA	170,199	5.1%	61.6	12.2x	2.1x
Life Insurance	2,081	2,074	+7.53	+0.36%	12	55,565	1.7%	147.5	2.5%	NM	NM	UPGDCL	159,047	4.8%	58.4	22.5x	4.8x
Telecommunication	4,461	4,427	+33.98	+0.77%	2	454,416	13.6%	47.8	0.8%	12.4x	9.3x	RENATA	93,178	2.8%	6.0	23.2x	4.3x
Pharmaceutical	2,932	2,926	+5.66	+0.19%	32	550,092	16.4%	240.8	4.1%	18.8x	2.3x	ICB	69,542	2.1%	9.5	31.3x	1.6x
Fuel & Power	1,615	1,610	+4.68	+0.29%	20	417,899	12.5%	187.4	3.2%	12.3x	1.4x	MARICO	65,400	2.0%	1.8	22.4x	41.1x
Cement	1,186	1,192	-6.63	-0.56%	7	73,815	2.2%	45.9	0.8%	28.4x	1.8x	BERGERPBL	61,683	1.8%	1.4	27.6x	7.0x
Services & Real Estate	1,007	1,011	-3.59	-0.36%	9	40,886	1.2%	42.8	0.7%	85.7x	0.9x	BRACBANK	60,858	1.8%	83.9	14.4x	1.4x
Engineering	2,935	2,952	-16.86	-0.57%	40	364,124	10.9%	433.4	7.3%	30.6x	1.6x	BXPBARMA	59,901	1.8%	0.0	17.0x	1.8x
Food & Allied	12,716	12,724	-7.70	-0.06%	17	238,607	7.1%	91.8	1.6%	20.3x	5.4x	LHBL	42,622	1.3%	10.3	20.6x	2.5x
IT	2,242	2,212	+30.55	+1.38%	10	24,783	0.7%	255.5	4.3%	23.7x	2.1x	ISLAMIBANK	42,021	1.3%	8.5	7.5x	0.7x
Textile	1,025	1,017	+7.62	+0.75%	56	105,830	3.2%	222.2	3.8%	221.0x	0.7x	SUMITPOWER	39,405	1.2%	11.2	7.3x	1.1x
Paper & Printing	5,240	5,219	+21.59	+0.41%	4	14,761	0.4%	42.0	0.7%	61.9x	1.1x	OLYMPIC	36,009	1.1%	13.7	17.8x	4.4x
Tannery	1,654	1,651	+2.37	+0.14%	6	17,907	0.5%	55.4	0.9%	NM	1.7x	DUTCHBANGL	35,255	1.1%	2.6	7.7x	1.2x
Jute	9,161	9,022	+139.28	+1.54%	3	2,084	0.1%	34.5	0.6%	NM	10.8x	TITASGAS	30,270	0.9%	2.7	8.5x	0.4x
Ceramics	418	418	-	-	5	22,360	0.7%	10.7	0.2%	56.0x	1.5x	EBL	28,251	0.8%	4.6	7.1x	1.0x
Miscellaneous	1,834	1,832	+2.13	+0.12%	13	104,908	3.1%	158.3	2.7%	32.6x	1.1x	NATLIFEINS	25,926	0.8%	21.2	NM	NM
												CITYBANK	24,800	0.7%	13.8	8.0x	0.9x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GOLDENSON	11.2	+12.0%	28.1	NM	0.6x
DSSL	12.1	+10.0%	34.1	9.8x	0.6x
SONARBAINS	50.7	+10.0%	84.3	23.7x	2.5x
NITOLINS	69.6	+10.0%	248.6	12.0x	2.6x
PRIMEINSUR	43.3	+9.9%	32.2	NM	2.5x
GREENDELT	59.2	+9.8%	32.4	12.1x	0.9x
RELIANCINS	59.2	+9.8%	92.7	9.5x	1.0x
CONTININS	47.5	+9.7%	130.0	35.8x	2.4x
DHAKAINS	55.7	+9.4%	45.1	23.1x	2.8x
MALEKSPIN	15.5	+9.2%	18.0	NM	0.4x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	111,361	8.8%	12.2x	2.1x
BXPBARMA	52,000	4.1%	17.0x	1.8x
BATBC	49,191	3.9%	16.2x	5.0x
RENATA	45,490	3.6%	23.2x	4.3x
GP	43,318	3.4%	12.2x	10.3x
BRACBANK	33,904	2.7%	14.4x	1.4x
OLYMPIC	26,024	2.1%	17.8x	4.4x
ISLAMIBANK	20,473	1.6%	7.5x	0.7x
EBL	19,725	1.6%	7.1x	1.0x
CITYBANK	17,876	1.4%	8.0x	0.9x
PUBALIBANK	16,837	1.3%	10.3x	0.7x
UPGDCL	15,905	1.3%	22.5x	4.8x
BEXIMCO	15,604	1.2%	43.7x	0.3x
LHBL	15,054	1.2%	20.6x	2.5x
SUMITPOWER	14,497	1.1%	7.3x	1.1x
NBL	14,392	1.1%	5.8x	0.4x
ALARABANK	13,309	1.0%	6.3x	1.0x
PRIMEBANK	11,685	0.9%	16.5x	0.8x
SHAHJABANK	11,362	0.9%	11.4x	1.2x
BEACONPHAR	11,141	0.9%	40.1x	3.4x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NITOLINS	69.6	+10.0%	248.6	12.0x	2.6x
CONTININS	47.5	+9.7%	130.0	35.8x	2.4x
PIONEERINS	84.0	+6.2%	128.3	11.3x	1.8x
NORTHRNINS	42.3	+3.4%	125.2	25.2x	2.0x
ASIAPACINS	90.6	+3.7%	112.7	49.9x	4.4x
ADNTEL	55.6	-1.8%	101.2	19.4x	2.2x
RELIANCINS	59.2	+9.8%	92.7	9.5x	1.0x
BDFINANCE	22.6	+6.1%	88.0	11.3x	1.3x
NFML	18.9	+5.6%	86.7	65.6x	1.6x
QUASEMIND	47.1	+6.3%	86.7	70.7x	1.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SEMLFBSLGF	10.4	-6.3%	17.9	NM	1.0x
1STPRIMFMF	20.1	-6.1%	30.4	NM	1.9x
ICB3RDNRB	6.5	-5.8%	9.5	NM	1.2x
AIBL1STIMF	8.4	-5.6%	8.6	NM	0.9x
VAMLBDMF1	8.6	-5.5%	9.2	NM	0.8x
VAMLRBBF	10.7	-5.3%	8.4	NM	1.1x
SHYAMPUSUG	62.0	-5.2%	0.6	NM	NM
ICBAMCL2ND	9.2	-5.2%	15.9	NM	1.5x
EXIM1STMF	7.4	-5.1%	47.5	NM	0.8x
POPULAR1MF	5.7	-5.0%	16.0	NM	0.6x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of
ACFL	30.6	30.6	0.6	20	1
ASIAPACINS	86	85	36.6	430	9
BRACBANK	46	45.6	27.4	600	2
CAPMBDBLMF	9.6	9.6	0.6	61	1
CAPMIBBLMF	20.7	20.7	2.1	100	1
CENTRALINS	54.5	52	2.8	52	3
COPPERTECH	18.7	18.7	0.6	29	1
EASTERNINS	117.5	110	31.6	276	10
GQBALLPEN	220.5	220.5	2.2	10	3
GRAMEENS2	18.8	18.8	3.8	200	1

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ICBEPMF1S1	8.1	8.1	0.6	70	1
JANATAINS	34.1	34.1	1.0	30	1
KOHINOOR	470	469.6	1.7	4	3
NFML	18.1	18.1	4.9	270	4
NITOLINS	68	57	4.1	70	2
PARAMOUNT	150.9	150.9	3.3	22	1
PRAGATILIF	79.5	79.5	0.5	7	1
PROVATIINS	84	84	1.0	12	1
PURABIGEN	29.2	29.2	0.6	20	1
SAIHAMCOT	16.1	16.1	0.7	43	1
SEMLIBLSF	12.4	12.4	1.3	105	1
SKTRIMS	59	56	1.6	28	3
Total			129.6		52

Important DSE News
MALEKSPIN

The Company has informed that the Board of Directors has approved the proposal of the Board of Directors of New Asia Synthetics Limited (NSL) a wholly owned subsidiary of the company to raise the paid up capital from existing Tk. 500,000,000.00 to Tk. 660,000,000.00 consisting of 6,600,000 ordinary shares of Tk.100.00 each. The funds so raised would be utilized for payment for purchase of additional strategic lands, ancillary investments, other purposes and obligations of NSL. The Board of Directors of NSL has offered the proportionate additional shares of Tk.158,868,800.00 to MSML. The Board of Directors of MSML have approved the proposal of NSL. As a result, the shareholding percentage will remain unchanged i.e 99.293%. MSML shall subscribe to the proposed additional share issues of the above subsidiary from its internal generation of funds. The proposed Capital Restructuring of the subsidiary and liquidation of their loans/advances/quasi equity and payment for additional land and ancillary investments as the case may be, are expected to result in financial discipline and economic operations of the respective company. It may be mentioned that the implementation of NSL project was shelved, as approved by the shareholders of MSML in its AGM held on 27th December, 2010 due to non-availability of gas from Titas Gas Transmission & Distribution Company Ltd. However, NSL had to continue to purchase certain contracted strategic lands due to geographical contiguity, location and security positions which would require additional funds for implementation of the project in due course of time.

AFCAGRO

The Board of Directors has recommended no dividend for the year ended on June 30, 2020. Date of AGM: 31.12.2020, Time: 10:00 AM, Venue: Digital Platform. Record Date: 15.12.2020. The Company has reported EPS of Tk. 0.32, NAV per share of Tk. 17.85 and NOCFPS of Tk. 2.28 for the year ended on June 30, 2020 as against Tk. 2.93 (Restated), Tk. 19.29 and Tk. 4.10 respectively for the same period of the previous year.

GOLDENSON

The Board of Directors has recommended 2.5% cash for General Shareholders excluding Sponsors/Directors for the year ended on June 30, 2020. The Sponsors/Directors hold 6,69,33,171 shares out of total 171,729,772 shares and the cash dividend to be payable to the General shareholders of Tk. 2,61,99,150.25. Date of AGM: 31.12.2020, Time: 11:00 AM, Venue: To be notified later. Record Date: 15.12.2020. The Company has also reported Consolidated EPS of Tk. (1.05), Consolidated NAV per share of Tk. 20.03 and Consolidated NOCFPS of Tk. 0.10 for the year ended on June 30, 2020 as against Tk. (0.99), Tk. 21.08 and Tk. 1.02 respectively for the same period of the previous year. The Company has also informed that the significant deviation in EPS and NOCFPS as follows: Consolidated EPS decreased significantly due to significant decrease of turnover and increase of financial expenses in comparison to the previous year as an effect of COVID 19 pandemic. Consolidated NOCFPS decreased significantly because of significant decrease of cash receipts from customers in comparison to the previous year due to COVID 19 pandemic.

GLAXOSMITH

The Board of Directors of DSE has approved the change of name, trading code and sector of the Company will be 'Unilever Consumer Care Limited' instead of 'GlaxoSmithKline Bangladesh Limited' and DSE Trading Code for Unilever Consumer Care Limited will be "UNILEVERCL" instead of "GLAXOSMITH" and sector will be "Food & Allied" instead of "Pharmaceuticals and Chemicals" with effect from November 26, 2020. Other things (except name, trading code and sector) will remain unchanged.

MONNOSTAF

The Board of Directors of DSE has approved the change of name and trading code of the Company will be 'Monno Agro & General Machinery Limited' instead of 'Monno Jute Stafflers Limited' and DSE Trading Code for Monno Agro & General Machinery Limited will be "MONNOAGML" instead of "MONNOSTAF" with effect from November 26, 2020. Other things (except name and trading code) will remain unchanged.

SEMLFBSLGF

Padma Bank Securities Ltd., one of the Corporate Sponsors of the Fund, has expressed its intention to sell 25,00,000 units out of its total holding of 20,500,000 units of the Fund at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
MEGCONMILK	-	0.0%	0.0%	Record Date	26-Nov-20
MEGHNAPEP	-	0.0%	0.0%	Record Date	26-Nov-20
OLYMPIC	-	0.0%	52.0%	Record Date	26-Nov-20
QUEENSOUTH	-	8.0%	8.0%	Record Date	26-Nov-20
SKTRIMS	-	0.0%	15.0%	Record Date	26-Nov-20
NORTHERN	-	0.0%	5.0%	Record Date	26-Nov-20

Upcoming IPOs

Company Name	Event	Opening Date	Closing Date
Robi Axiata Limited	Subscription	17-11-20	23-11-20
Energypac Power	Subscription	07-12-20	13-12-20

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ALARABANK

The Company has informed that the Board of Directors has approved the revaluation of Land measuring 30.36 Khata situated at 63, Purana Palton, Dhaka of the bank from book value of Tk. 136.62 crore to Tk. 151.80 crore i.e. increased by Tk. 15.18 crore only as conducted by a renowned surveyor G.K Adjuster Limited and certified by Rahman Mostafa Alam & Co. Chartered Accountants and Hussain Farhad & Co. Chartered Accountants.

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