

## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.64%) lost 44.22 points and closed at 6,837.81. The blue-chip index DS30 (-0.65%), the Shariah-based index DSES (-0.25%), and the large-cap index CDSET (-0.62%) closed at 2,568.42, 1,456.66, and 1,382.53 points, respectively. All the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 1.26% followed by NBF1 (-1.04%), Bank (-0.94%), Engineering (-0.74%), Fuel & Power (-0.65%), Pharmaceutical (-0.30%), and Food & Allied (-0.07%), respectively. Block trades contributed 0.7% of the overall market turnover. One Bank Limited (-7.0%) was the most traded share with a turnover of BDT 1,249 million.

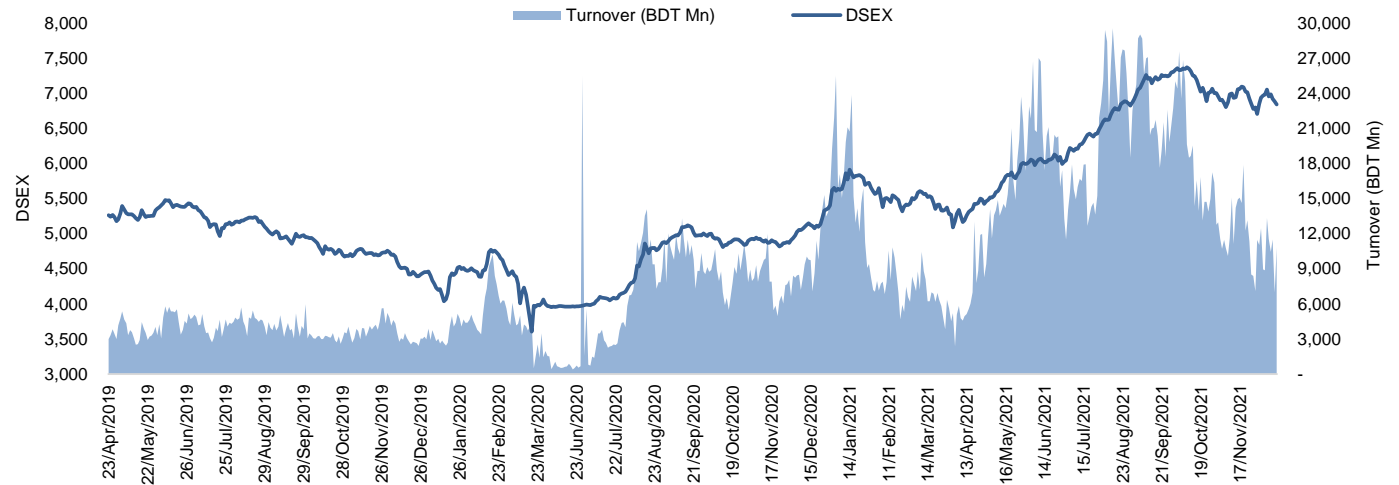


Figure: Sectorial Turnover (BDT)

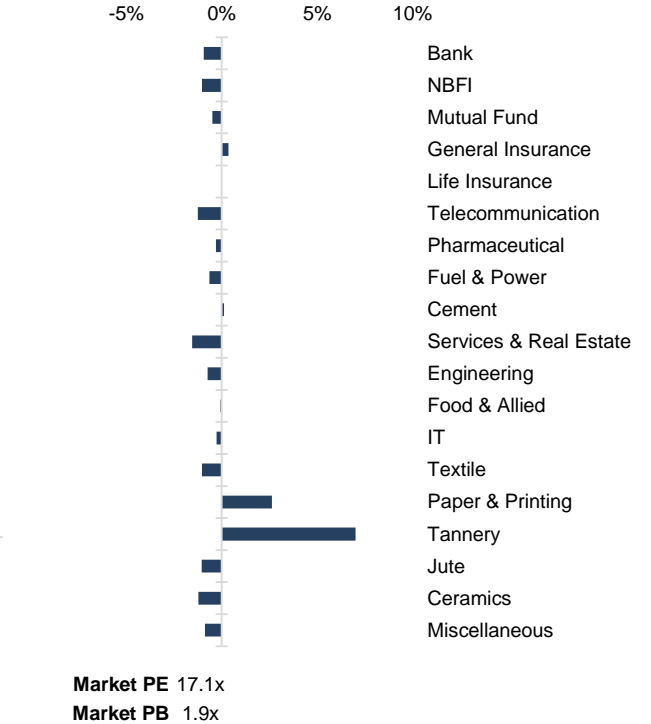
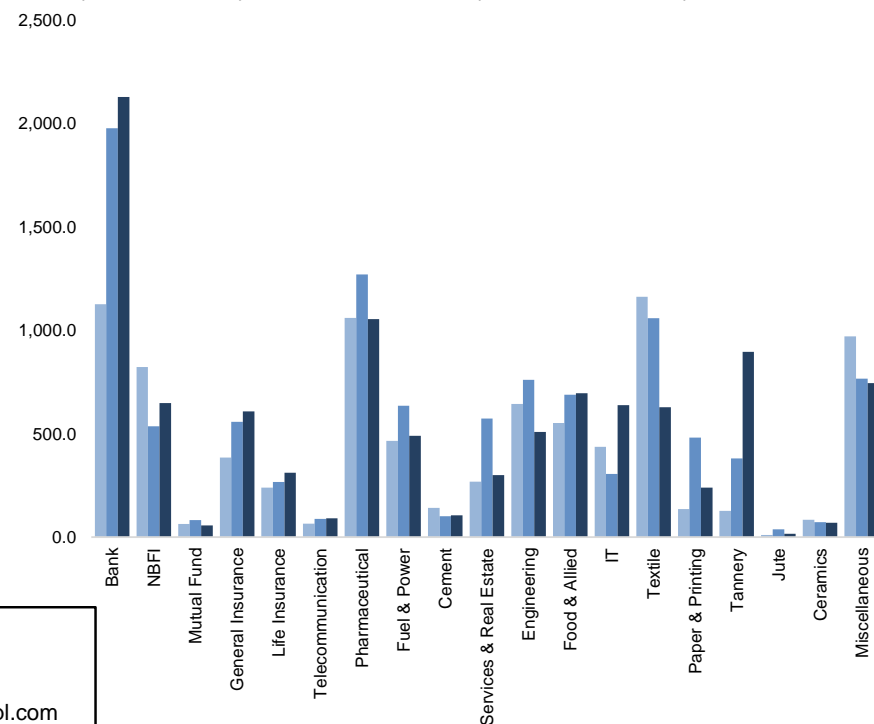
Figure: Sectorial Mcap Change

| Index | Closing  | Opening  | Point Δ | %Δ     | YTD %Δ |
|-------|----------|----------|---------|--------|--------|
| DSEX  | 6,837.81 | 6,882.02 | -44.22  | -0.64% | +26.6% |
| DS30  | 2,568.42 | 2,585.33 | -16.91  | -0.65% | +30.8% |
| DSES  | 1,456.66 | 1,460.32 | -3.66   | -0.25% | +17.3% |
| CDSET | 1,382.53 | 1,391.17 | -8.64   | -0.62% | +23.1% |

|                     | Advanced | Declined | Unchanged | Total |
|---------------------|----------|----------|-----------|-------|
| All Category        | 88       | 249      | 40        | 377   |
| A Category (Equity) | 67       | 180      | 32        | 279   |
| B Category (Equity) | 13       | 41       | 2         | 56    |
| N Category (Equity) | 1        | 10       | 1         | 12    |
| Z Category (Equity) | 7        | 18       | 5         | 30    |
| Mutual Funds        | 4        | 17       | 15        | 36    |
| Corporate Bonds     | 2        | 0        | 0         | 2     |

|              |           | Today     | Last Day  | Daily %Δ |
|--------------|-----------|-----------|-----------|----------|
| Mcap         | Mn BDT    | 5,500,750 | 5,530,908 | -0.5%    |
|              | Mn USD    | 64,111    | 64,463    |          |
| Turnover     | Mn BDT    | 10,808    | 6,966     | +55.1%   |
|              | Mn USD    | 126       | 81        |          |
| Volume       | Mn Shares | 288       | 195       | +48.1%   |
| No. of Trade |           | 185,724   | 157,848   | +17.7%   |

Figure: Sectorial Turnover (BDT)



Market PE 17.1x  
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                   | 1,634   | 1,649   | -15.48   | -0.94% | 32               | 734,469       | 15.0%           | 2,126.9           | 20.8%               | 8.1x  | 0.9x  | GP                    | 478,816       | 9.8%            | 34.3              | 13.2x | 11.5x |
| NBFI                   | 2,478   | 2,504   | -26.04   | -1.04% | 23               | 230,412       | 4.7%            | 648.3             | 6.3%                | 21.8x | 4.1x  | WALTONHIL             | 356,213       | 7.3%            | 4.8               | 23.4x | 3.9x  |
| Mutual Fund            | 910     | 915     | -4.46    | -0.49% | 37               | 41,803        | 0.9%            | 57.0              | 0.6%                | NM    | 0.8x  | BATBC                 | 351,378       | 7.2%            | 119.7             | 25.6x | 8.7x  |
| General Insurance      | 4,818   | 4,801   | +16.92   | +0.35% | 39               | 127,457       | 2.6%            | 607.4             | 5.9%                | 20.0x | 2.2x  | ROBI                  | 200,613       | 4.1%            | 31.0              | 87.3x | 3.0x  |
| Life Insurance         | 2,676   | 2,676   | +0.33    | +0.01% | 13               | 74,005        | 1.5%            | 311.4             | 3.0%                | NM    | NM    | SQURPHARMA            | 191,651       | 3.9%            | 73.0              | 11.3x | 2.0x  |
| Telecommunication      | 5,948   | 6,024   | -75.73   | -1.26% | 3                | 710,217       | 14.5%           | 91.4              | 0.9%                | 17.4x | 6.1x  | UPGDCL                | 147,185       | 3.0%            | 13.6              | 13.5x | 4.2x  |
| Pharmaceutical         | 4,011   | 4,023   | -12.23   | -0.30% | 32               | 726,412       | 14.8%           | 1,054.1           | 10.3%               | 19.3x | 2.7x  | RENATA                | 140,380       | 2.9%            | 24.3              | 27.0x | 5.2x  |
| Fuel & Power           | 1,881   | 1,893   | -12.26   | -0.65% | 23               | 482,128       | 9.9%            | 490.2             | 4.8%                | 11.9x | 1.2x  | BEXIMCO               | 132,061       | 2.7%            | 591.5             | 13.1x | 1.8x  |
| Cement                 | 2,637   | 2,633   | +3.32    | +0.13% | 7                | 133,906       | 2.7%            | 104.9             | 1.0%                | 18.6x | 2.8x  | ICB                   | 98,068        | 2.0%            | 9.3               | 69.4x | 2.2x  |
| Services & Real Estate | 1,350   | 1,371   | -21.21   | -1.55% | 8                | 53,300        | 1.1%            | 299.7             | 2.9%                | NM    | 1.1x  | LHBL                  | 89,077        | 1.8%            | 81.9              | 22.6x | 4.6x  |
| Engineering            | 4,829   | 4,865   | -36.07   | -0.74% | 42               | 571,619       | 11.7%           | 508.3             | 5.0%                | 19.0x | 2.1x  | BXPHERMA              | 88,419        | 1.8%            | 133.3             | 16.0x | 2.3x  |
| Food & Allied          | 25,197  | 25,215  | -17.64   | -0.07% | 20               | 456,830       | 9.3%            | 694.9             | 6.8%                | 31.2x | 9.2x  | BERGERPBL             | 83,160        | 1.7%            | 1.3               | 26.7x | 6.9x  |
| IT                     | 3,390   | 3,400   | -9.14    | -0.27% | 11               | 43,536        | 0.9%            | 637.3             | 6.2%                | 37.3x | 3.1x  | BRACBANK              | 77,266        | 1.6%            | 77.4              | 13.5x | 1.6x  |
| Textile                | 1,592   | 1,609   | -16.62   | -1.03% | 58               | 165,219       | 3.4%            | 628.2             | 6.1%                | 35.9x | 1.0x  | MARICO                | 73,014        | 1.5%            | 7.0               | 22.1x | 31.0x |
| Paper & Printing       | 7,488   | 7,296   | +192.12  | +2.63% | 6                | 24,861        | 0.5%            | 238.8             | 2.3%                | NM    | 1.8x  | BEACONPHAR            | 55,001        | 1.1%            | 23.9              | 63.7x | 10.3x |
| Tannery                | 3,212   | 3,001   | +210.59  | +7.02% | 6                | 36,573        | 0.7%            | 894.9             | 8.8%                | NM    | 3.6x  | ISLAMIBANK            | 51,520        | 1.1%            | 23.3              | 9.6x  | 0.8x  |
| Jute                   | 7,784   | 7,866   | -82.51   | -1.05% | 3                | 2,115         | 0.0%            | 16.7              | 0.2%                | NM    | 21.3x | DUTCHBANGL            | 50,663        | 1.0%            | 25.3              | 8.6x  | 1.4x  |
| Ceramics               | 676     | 685     | -8.31    | -1.21% | 5                | 31,262        | 0.6%            | 69.9              | 0.7%                | 32.0x | 2.0x  | SUMITPOWER            | 42,502        | 0.9%            | 16.2              | 8.0x  | 1.1x  |
| Miscellaneous          | 4,830   | 4,872   | -42.58   | -0.87% | 14               | 248,407       | 5.1%            | 744.6             | 7.3%                | 17.7x | 2.3x  | POWERGRID             | 40,412        | 0.8%            | 97.6              | 12.2x | 0.4x  |
|                        |         |         |          |        |                  |               |                 |                   |                     |       |       | UNILEVERCL            | 37,916        | 0.8%            | 36.0              | 82.8x | 28.3x |

| Top Ten Gainers | Close Price (BDT) | Δ%    | Turnover (BDT Mn) | PE    | PB   |
|-----------------|-------------------|-------|-------------------|-------|------|
| FORTUNE         | 103.1             | +9.4% | 842.5             | 44.2x | 7.0x |
| AMCL(PRAN)      | 276.4             | +8.5% | 51.6              | 49.5x | 3.2x |
| APEXFOOT        | 298.5             | +8.0% | 26.5              | 32.0x | 1.2x |
| PHARMAID        | 647.0             | +7.5% | 167.5             | 37.5x | 6.6x |
| APEXFOODS       | 163.5             | +7.0% | 28.1              | 87.0x | 1.3x |
| LIBRAINFU       | 984.0             | +6.9% | 43.9              | NM    | 0.8x |
| PRIMEINSUR      | 69.2              | +6.6% | 39.8              | 20.7x | 3.7x |
| RANFOUNDRY      | 162.0             | +5.9% | 20.6              | 43.9x | 5.4x |
| BATASHOE        | 933.0             | +5.9% | 7.8               | NM    | 3.7x |
| LINDEBD         | 1,628.2           | +5.4% | 110.7             | 19.8x | 4.3x |

| Top Ten Losers | Close Price (BDT) | Δ%    | Turnover (BDT Mn) | PE    | PB    |
|----------------|-------------------|-------|-------------------|-------|-------|
| SHYAMPSUG      | 85.3              | -8.1% | 0.8               | NM    | NM    |
| ZEALBANGLA     | 123.5             | -7.6% | 0.9               | NM    | NM    |
| ONEBANKLTD     | 14.6              | -7.0% | 1,249.2           | 7.4x  | 0.8x  |
| MEGHNAPEP      | 21.7              | -6.9% | 0.4               | NM    | NM    |
| GBBPOWER       | 33.7              | -6.4% | 40.7              | 21.8x | 1.6x  |
| ISNLTD         | 44.9              | -6.1% | 17.8              | NM    | 17.3x |
| JUTESPINN      | 116.7             | -5.9% | 0.1               | NM    | NM    |
| FASFIN         | 7.4               | -5.1% | 14.0              | NM    | NM    |
| INTECH         | 29.2              | -4.3% | 4.3               | NM    | 2.7x  |
| SIMTEX         | 16.0              | -4.2% | 6.5               | 21.0x | 0.7x  |

| Top Twenty Free Float Mcap | Free Float Mcap (BDT Mn) | % of Total Free Float Mcap | PE    | PB    |
|----------------------------|--------------------------|----------------------------|-------|-------|
| SQURPHARMA                 | 125,397                  | 6.8%                       | 11.3x | 2.0x  |
| BATBC                      | 92,939                   | 5.1%                       | 25.6x | 8.7x  |
| BEXIMCO                    | 91,717                   | 5.0%                       | 13.1x | 1.8x  |
| RENATA                     | 68,533                   | 3.7%                       | 27.0x | 5.2x  |
| BXPHERMA                   | 61,734                   | 3.4%                       | 16.0x | 2.3x  |
| GP                         | 47,882                   | 2.6%                       | 13.2x | 11.5x |
| BRACBANK                   | 41,538                   | 2.3%                       | 13.5x | 1.6x  |
| BEACONPHAR                 | 38,499                   | 2.1%                       | 63.7x | 10.3x |
| LHBL                       | 31,462                   | 1.7%                       | 22.6x | 4.6x  |
| ISLAMIBANK                 | 25,081                   | 1.4%                       | 9.6x  | 0.8x  |
| EBL                        | 24,975                   | 1.4%                       | 6.6x  | 1.1x  |
| OLYMPIC                    | 20,000                   | 1.1%                       | 17.5x | 3.4x  |
| ROBI                       | 19,961                   | 1.1%                       | 87.3x | 3.0x  |
| CITYBANK                   | 19,484                   | 1.1%                       | 6.5x  | 0.9x  |
| PUBALIBANK                 | 19,162                   | 1.0%                       | 5.3x  | 0.7x  |
| IFIC                       | 18,794                   | 1.0%                       | 14.4x | 1.0x  |
| NBL                        | 17,331                   | 0.9%                       | 6.9x  | 0.4x  |
| ALARABANK                  | 16,404                   | 0.9%                       | 10.2x | 1.2x  |
| ORIONPHARM                 | 15,789                   | 0.9%                       | 28.4x | 1.2x  |
| SUMITPOWER                 | 15,636                   | 0.9%                       | 8.0x  | 1.1x  |

\*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        | 14.6              | -7.0% | 1,249.2           | 7.4x  | 0.8x |
| FORTUNE           | 103.1             | +9.4% | 842.5             | 44.2x | 7.0x |
| BEXIMCO           | 150.7             | -2.4% | 591.5             | 13.1x | 1.8x |
| GENEXIL           | 174.9             | +1.8% | 527.9             | 51.8x | 9.8x |
| GSPFINANCE        | 28.2              | +0.7% | 361.8             | 15.8x | 1.3x |
| DELTALIFE         | 191.3             | +2.4% | 266.9             | NM    | NM   |
| OLYMPIC           | 164.9             | +1.4% | 216.2             | 17.5x | 3.4x |
| SONALIPAPR        | 762.9             | +5.4% | 199.5             | 99.8x | 2.6x |
| SAIFPOWER         | 41.6              | -4.1% | 197.5             | 23.2x | 2.5x |
| SKICL             | 80.3              | -2.3% | 179.2             | 30.2x | 4.4x |

| Block Trade | Maximum Price (BDT) | Price (BDT) | No. of Trade | Quantity ('000) | Turnover (BDT Mn) |
|-------------|---------------------|-------------|--------------|-----------------|-------------------|
| GENEXIL     | 170.5               | 163.0       | 3.0          | 1,146           | 187.29            |
| MONNOCERA   | 106.9               | 106.9       | 1.0          | 1,200           | 128.28            |
| BRACBANK    | 54.9                | 54.9        | 1.0          | 1,381           | 75.80             |
| SONALIPAPR  | 728.0               | 670.0       | 10.0         | 73              | 50.83             |
| ENVOYTEX    | 50.0                | 50.0        | 1.0          | 700             | 35.00             |
| RDFOOD      | 52.0                | 51.0        | 11.0         | 352             | 18.05             |
| LRGLOBMF1   | 7.1                 | 7.1         | 2.0          | 1,290           | 9.16              |
| POWERGRID   | 58.8                | 58.7        | 2.0          | 155             | 9.10              |
| BEXIMCO     | 162.0               | 162.0       | 2.0          | 50              | 8.10              |
| FIRSTSBANK  | 15.1                | 12.5        | 2.0          | 450             | 6.28              |

| Block Trade  | Maximum Price (BDT) | Minimum Price (BDT) | Turnover (BDT Mn) | Quantity ('000) | No. of Trade |
|--------------|---------------------|---------------------|-------------------|-----------------|--------------|
| GENEXIL      | 170.5               | 163.0               | 187.3             | 1,146           | 3            |
| MONNOCERA    | 106.9               | 106.9               | 128.3             | 1,200           | 1            |
| BRACBANK     | 54.9                | 54.9                | 75.8              | 1,381           | 1            |
| SONALIPAPR   | 728.0               | 670.0               | 50.8              | 73              | 10           |
| ENVOYTEX     | 50.0                | 50.0                | 35.0              | 700             | 1            |
| RDFOOD       | 52.0                | 51.0                | 18.0              | 352             | 11           |
| LRGLOBMF1    | 7.1                 | 7.1                 | 9.2               | 1,290           | 2            |
| POWERGRID    | 58.8                | 58.7                | 9.1               | 155             | 2            |
| BEXIMCO      | 162.0               | 162.0               | 8.1               | 50              | 2            |
| FIRSTSBANK   | 15.1                | 12.5                | 6.3               | 450             | 2            |
| FORTUNE      | 99.8                | 92.2                | 4.2               | 43              | 4            |
| NEWLINE      | 38.9                | 38.9                | 3.9               | 100             | 1            |
| ONEBANKLTD   | 17.0                | 15.6                | 3.3               | 211             | 2            |
| GSPFINANCE   | 28.0                | 26.0                | 3.3               | 120             | 2            |
| DBH1STMF     | 7.9                 | 7.9                 | 3.0               | 385             | 1            |
| UNIQUEHRL    | 55.3                | 55.3                | 2.8               | 50              | 1            |
| SAIFPOWER    | 43.5                | 43.5                | 2.6               | 60              | 1            |
| PHOENIXFIN   | 28.0                | 28.0                | 2.6               | 92              | 1            |
| ROBI         | 38.5                | 38.5                | 2.5               | 65              | 1            |
| PHARMAID     | 605.1               | 605.1               | 2.3               | 4               | 1            |
| NRBCBANK     | 30.2                | 30.2                | 2.1               | 70              | 1            |
| BBSCABLES    | 63.0                | 63.0                | 2.0               | 32              | 1            |
| <b>Total</b> |                     |                     | <b>582.9</b>      |                 | <b>72</b>    |

**Important DSE News**
**BARKAPOWER**

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the entity rating (Surveillance) of the Company as "AA1" along with a stable outlook based on audited financial statements up to June 30, 2021, bank liability position as on October 31, 2021, and other relevant quantitative and qualitative information up to the date of rating declaration.

**QUASEMIND**

Credit Rating Agency of Bangladesh Limited (CRAB) has announced the Entity Rating of the Company as "A1" along with a stable outlook based on audited financial statements up to June 30, 2021; bank liability as of November 30, 2021, and other relevant quantitative and qualitative information up to the date of rating declaration.

**BSRMSTEEL**

H. Akberali & Co. Limited, one of the Corporate Directors of the Company, has expressed its intention to buy 8,50,000 shares of the Company at prevailing market price (in the Public Market) through Stock Exchange (DSE) within next 30 working days, as per Rule-4 of the BSEC (Substantial Acquisition of shares and Takeovers), Rules, 2018.

**DSHGARME**

Miss Vidiya Amrit Khan, one of the Directors of the company, has expressed her intention to sell 1,66,505 shares out of her total holding of 11,33,199 shares of the Company 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  |             |           |
| S. S. Steel Limited                | -           | 8.0%     | 2.0%  | Record Date | 15-Dec-21 |
| Bangladesh Services Ltd.           | -           | 0.0%     | 0.0%  | Record Date | 19-Dec-21 |
| Eastern Cables Ltd.                | -           | 0.0%     | 0.0%  | Record Date | 20-Dec-21 |
| Silco Pharmaceuticals Limited      | -           | 0.0%     | 10.0% | Record Date | 20-Dec-21 |
| Beacon Pharmaceuticals Limited     | -           | 0.0%     | 15.0% | Record Date | 20-Dec-21 |
| Tung Hai Knitting & Dyeing Limited | -           | 0.0%     | 0.0%  | Record Date | 20-Dec-21 |
| Beach Hatchery Ltd.                | -           | 0.0%     | 1.0%  | Record Date | 22-Dec-21 |

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