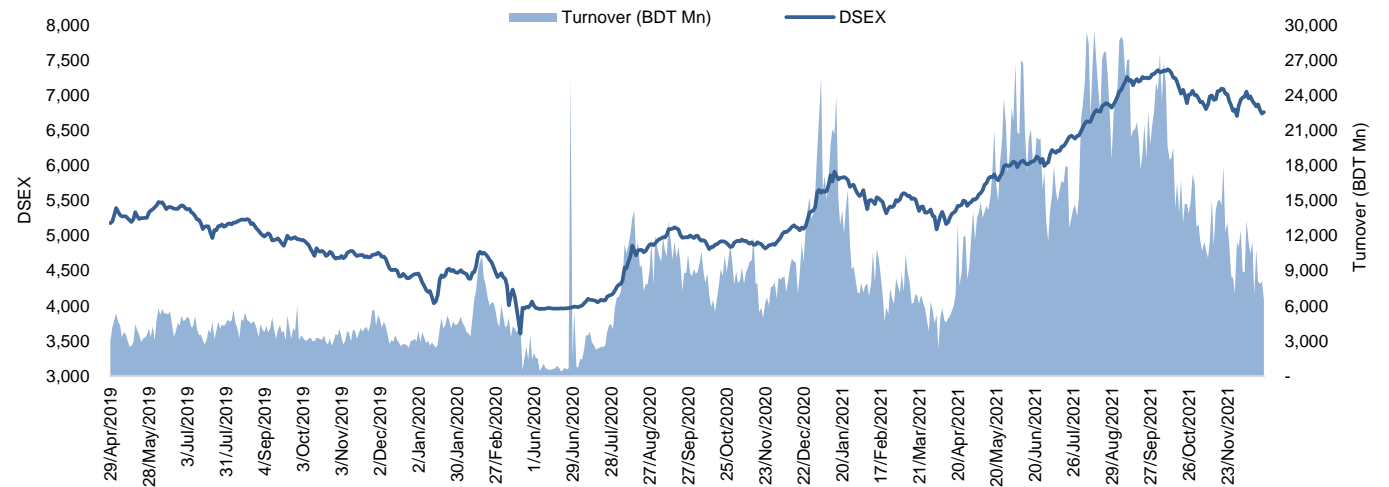


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.31%) gained 20.7 points and closed at 6,757.26. The bluechip index DS30 (+0.39%), the Shariah-based index DSES (+0.27%), and the large-cap index CDSET (+0.35%) closed at 2,538.51, 1,436.53, and 1,367.19 points, respectively. All the large-cap sectors posted positive performance today. NBFi booked the highest gain of 0.64% followed by Bank (+0.41%), Food & Allied (+0.32%), Fuel & Power (+0.28%), Pharmaceutical (+0.11%), Engineering (-0.06%), and Telecommunication (-0.15%), respectively. Block trades contributed 0.6% of the overall market turnover. Bangladesh Export Import Company Ltd. (+2.1%) was the most traded share with a turnover of BDT 1,024 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,757.26	6,736.56	+20.70	+0.31%	+25.1%
DS30	2,538.51	2,528.66	+9.85	+0.39%	+29.3%
DSES	1,436.53	1,432.65	+3.88	+0.27%	+15.7%
CDSET	1,367.19	1,362.48	+4.71	+0.35%	+21.7%

	Advanced	Declined	Unchanged	Total
All Category	176	147	55	378
A Category (Equity)	126	110	37	273
B Category (Equity)	36	18	9	63
N Category (Equity)	2	8	2	12
Z Category (Equity)	12	11	7	30
Mutual Funds	10	10	16	36
Corporate Bonds	1	2	0	3

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,432,005	5,425,212	+0.1%
	Mn USD	63,310	63,231	
Turnover	Mn BDT	6,520	8,072	-19.2%
	Mn USD	76	94	
Volume	Mn Shares	151	185	-18.3%
No. of Trade		158,748	197,074	-19.4%

Anika Mafiz
Research Analyst
 (880) 1708805206
 anika.mafiz@bracepl.com

Fahim Hassan
Research Associate
 (880) 1709636546
 fahim.hassan@bracepl.com

Figure: Sectorial Turnover (BDT)

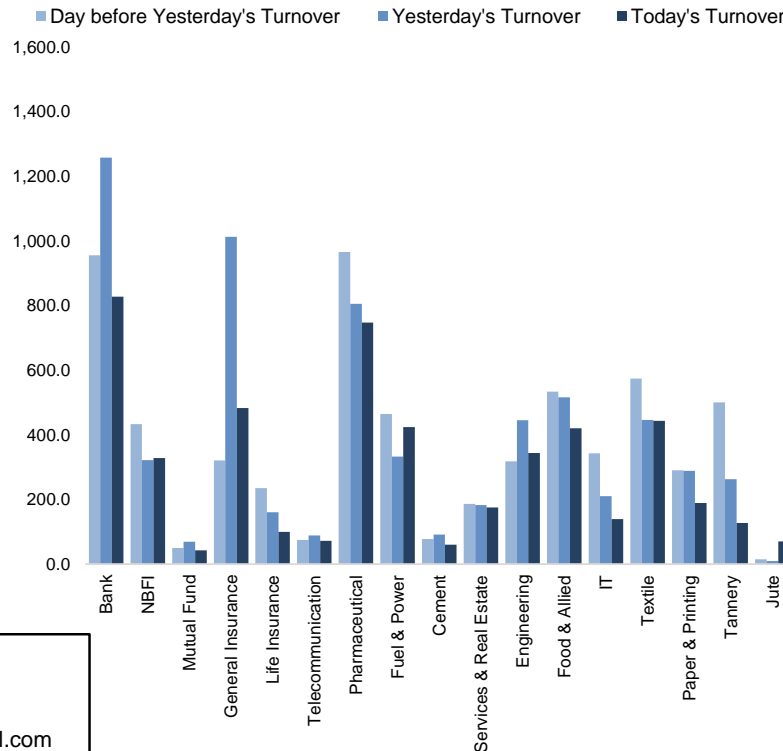
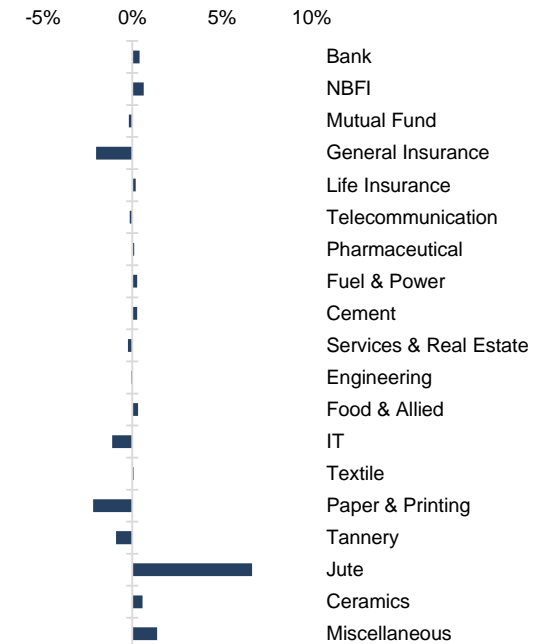


Figure: Sectorial Mcap Change



Market PE 16.8x
 Market PB 1.9x

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	1,580	1,574	+6.45	+0.41%	32	722,160	14.9%	827.2	13.2%	8.0x	0.9x	GP	471,795	9.8%	36.1	13.0x	11.3x
NBFI	2,286	2,271	+14.54	+0.64%	23	225,707	4.7%	327.8	5.2%	21.4x	4.0x	WALTONHIL	353,093	7.3%	13.4	23.2x	3.8x
Mutual Fund	889	891	-1.71	-0.19%	37	40,996	0.8%	42.3	0.7%	NM	0.8x	BATBC	345,654	7.1%	63.3	25.2x	8.6x
General Insurance	4,541	4,634	-93.25	-2.01%	39	130,115	2.7%	483.0	7.7%	20.4x	2.2x	ROBI	190,137	3.9%	27.0	82.8x	2.9x
Life Insurance	2,620	2,615	+5.09	+0.19%	13	74,242	1.5%	99.5	1.6%	NM	NM	SQURPHARMA	189,701	3.9%	69.8	11.2x	2.0x
Telecommunication	5,844	5,852	-8.50	-0.15%	3	692,472	14.3%	71.8	1.2%	17.0x	5.9x	UPGDCL	143,764	3.0%	9.8	13.2x	4.1x
Pharmaceutical	3,918	3,914	+4.43	+0.11%	32	720,549	14.9%	747.6	12.0%	19.0x	2.6x	RENATA	140,005	2.9%	7.5	26.9x	5.2x
Fuel & Power	1,804	1,799	+5.05	+0.28%	23	471,083	9.7%	424.2	6.8%	11.7x	1.2x	BEXIMCO	136,005	2.8%	1,024.5	13.5x	1.9x
Cement	2,502	2,495	+6.76	+0.27%	7	130,637	2.7%	59.8	1.0%	18.2x	2.7x	ICB	95,650	2.0%	1.4	67.7x	2.1x
Services & Real Estate	1,317	1,320	-3.12	-0.24%	8	51,683	1.1%	175.3	2.8%	NM	1.0x	BXPHARMA	87,839	1.8%	112.9	15.9x	2.3x
Engineering	4,744	4,746	-2.88	-0.06%	42	570,608	11.8%	344.0	5.5%	19.0x	2.1x	LHBL	86,522	1.8%	45.3	21.9x	4.5x
Food & Allied	25,338	25,257	+80.86	+0.32%	20	451,922	9.3%	419.8	6.7%	30.9x	9.1x	BERGERPBL	82,052	1.7%	3.4	26.4x	6.8x
IT	3,309	3,346	-37.59	-1.12%	11	42,197	0.9%	138.8	2.2%	36.1x	3.0x	BRACBANK	73,924	1.5%	33.6	12.9x	1.5x
Textile	1,481	1,479	+1.18	+0.08%	58	161,372	3.3%	443.0	7.1%	35.0x	1.0x	MARICO	73,030	1.5%	3.1	22.1x	31.0x
Paper & Printing	9,296	9,504	-208.30	-2.19%	6	31,045	0.6%	188.5	3.0%	NM	2.2x	BEACONPHAR	54,724	1.1%	40.6	47.3x	9.6x
Tannery	3,319	3,349	-30.38	-0.91%	6	34,946	0.7%	126.8	2.0%	NM	3.5x	ISLAMIBANK	52,164	1.1%	16.5	9.7x	0.8x
Jute	9,539	8,941	+598.77	+6.70%	3	2,262	0.0%	69.7	1.1%	NM	22.8x	DUTCHBANGL	49,841	1.0%	12.4	8.5x	1.4x
Ceramics	681	677	+3.87	+0.57%	5	30,809	0.6%	42.2	0.7%	31.5x	2.0x	SUMITPOWER	41,220	0.9%	26.4	7.8x	1.1x
Miscellaneous	4,810	4,744	+65.66	+1.38%	14	250,993	5.2%	1,212.9	19.4%	17.9x	2.3x	POWERGRID	39,628	0.8%	27.6	11.9x	0.4x
												UNILEVERCL	38,493	0.8%	17.4	84.1x	28.7x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
TAMIJTEX	162.3	+10.0%	6.9	65.7x	2.0x
FINEFOODS	49.9	+9.9%	9.4	NM	4.7x
SONALIANSH	529.0	+8.7%	63.5	NM	2.3x
HAKKANIPUL	58.5	+7.1%	15.1	NM	2.4x
MONNOAGML	607.5	+6.6%	11.5	NM	43.5x
EMERALDOIL	40.6	+6.6%	44.6	NM	2.6x
NTC	676.3	+6.5%	20.2	NM	7.7x
DSHGARME	167.8	+6.5%	15.7	NM	8.3x
ZEALBANGLA	131.4	+6.4%	0.3	NM	NM
APEXFOODS	167.4	+6.4%	30.0	89.0x	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
HWAWELLTEX	41.6	-7.3%	0.7	12.2x	1.3x
BNICL	128.4	-5.7%	4.0	44.5x	5.9x
SONALIPAPR	791.3	-5.0%	107.1	NM	3.3x
ASIAINS	100.0	-4.7%	44.4	35.1x	3.6x
SKICL	82.0	-4.7%	106.5	30.8x	4.5x
MEGCONMILK	14.4	-4.0%	0.8	NM	NM
SILCOPHL	25.0	-3.8%	12.7	30.1x	1.1x
PEOPLESINS	53.9	-3.8%	49.3	20.7x	1.8x
RSRMSTEEL	21.7	-3.6%	1.8	NM	0.5x
PRIMEINSUR	67.8	-3.0%	13.7	20.3x	3.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	124,121	6.8%	11.2x	2.0x
BEXIMCO	94,455	5.2%	13.5x	1.9x
BATBC	91,425	5.0%	25.2x	8.6x
RENATA	68,350	3.8%	26.9x	5.2x
BXPHARMA	61,330	3.4%	15.9x	2.3x
GP	47,179	2.6%	13.0x	11.3x
BRACBANK	39,742	2.2%	12.9x	1.5x
BEACONPHAR	38,305	2.1%	47.3x	9.6x
LHBL	30,560	1.7%	21.9x	4.5x
ISLAMIBANK	25,394	1.4%	9.7x	0.8x
EBL	24,642	1.4%	6.5x	1.1x
OLYMPIC	19,345	1.1%	17.0x	3.3x
PUBALIBANK	19,162	1.1%	5.3x	0.7x
CITYBANK	19,054	1.0%	6.3x	0.9x
ROBI	18,919	1.0%	82.8x	2.9x
IFIC	18,579	1.0%	14.2x	1.0x
BSRMLTD	17,816	1.0%	5.9x	1.0x
NBL	16,887	0.9%	6.7x	0.4x
ALARABANK	16,528	0.9%	10.3x	1.2x
ORIONPHARM	15,423	0.8%	27.7x	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
BEXIMCO	155.2	+2.1%	1,024.5	13.5x	1.9x
ONEBANKLTD	14.1	-0.7%	264.3	7.2x	0.7x
EASTRNLUB	3,680.9	+5.0%	146.8	100.0x	17.3x
IFIC	17.3	+4.8%	139.7	14.2x	1.0x
GSPFINANCE	27.0	+0.7%	133.4	16.6x	1.4x
SAIFPOWER	40.2	-	116.8	22.4x	2.4x
BXPHARMA	196.9	+0.8%	112.9	15.9x	2.3x
SONALIPAPR	791.3	-5.0%	107.1	NM	3.3x
SKICL	82.0	-4.7%	106.5	30.8x	4.5x
PHARMAID	667.9	+2.6%	97.4	38.7x	6.8x

Block Trade	Maximum Price (BDT)	Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
STANDBANKL	10.3	10.3	1.0	5,066	52.18
BATBC	640.0	640.0	1.0	79	50.30
AMANFEED	59.5	59.5	1.0	577	34.31
RAK CERAMIC	45.2	45.2	1.0	601	27.17
GENEXIL	171.8	171.8	4.0	150	25.77
PTL	94.0	94.0	1.0	198	18.57
PROVATIINS	116.0	115.0	2.0	150	17.35
SONALIPAPR	800.0	800.0	2.0	17	13.60
GSPFINANCE	28.4	28.4	1.0	270	7.67
AL-HAJTEX	72.5	71.9	6.0	88	6.36

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
STANDBANKL	10.3	10.3	52.2	5,066	1
BATBC	640.0	640.0	50.3	79	1
AMANFEED	59.5	59.5	34.3	577	1
RAKCERAMIC	45.2	45.2	27.2	601	1
GENEXIL	171.8	171.8	25.8	150	4
PTL	94.0	94.0	18.6	198	1
PROVATIINS	116.0	115.0	17.4	150	2
SONALIPAPR	800.0	800.0	13.6	17	2
GSPFINANCE	28.4	28.4	7.7	270	1
AL-HAJTEX	72.5	71.9	6.4	88	6
BEACONPHAR	249.1	249.1	3.5	14	1
EHL	52.0	52.0	2.8	54	1
PHOENIXFIN	27.7	27.6	2.7	97	2
BXPHARMA	197.0	197.0	2.7	14	1
ONEBANKLTD	15.3	15.3	1.5	100	1
SILCOPHL	28.5	28.5	1.4	50	1
SAIHAMTEX	21.8	21.8	1.3	61	1
ADVENT	29.5	29.5	1.1	36	1
SUMITPOWER	35.0	35.0	0.9	25	1
BEACHHATCH	26.0	26.0	0.8	30	1
ORIONINFU	97.1	97.1	0.7	7	1
GPHISPAT	56.5	56.5	0.7	12	1
Total			275.7		37

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Beach Hatchery Ltd.	-	0.0%	1.0%	Record Date	22-Dec-21

Important DSE News
ACMELAB

Credit Rating Information and Services Limited (CRISL) has rated the Company as "AA" in the long term and "ST-2" in the short term along with a stable outlook in consideration of its audited financials up to June 30, 2021; un-audited financials up to September 30, 2021, and other relevant quantitative as well as qualitative information up to the date of rating declaration.

NPOLYMER

National Credit Ratings Limited (NCR) has announced the surveillance rating of the Company as "A+" in the long term and "ST-2" in the short term along with a stable outlook based on audited financial statements as on June 30, 2021.

MONNOCERA

Monno Welfare Foundation, one of the Corporate Directors of the Company, has expressed its intention to sell 23,00,000 shares out of its total holding of 1,44,39,077 shares of the Company at prevailing market price (In the Block Market) through Stock Exchange (DSE) within next 30 working days.

ANLIMAYARN

Mr. Mahmudul Hoque, one of the Sponsor Directors of the company, has expressed his intention to sell 5,00,000 shares out of his total holding of 50,36,400 shares of the Company at prevailing market price (In the Public Market) through Stock Exchange (DSE) within next 30 working days.

Disclaimer: This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.