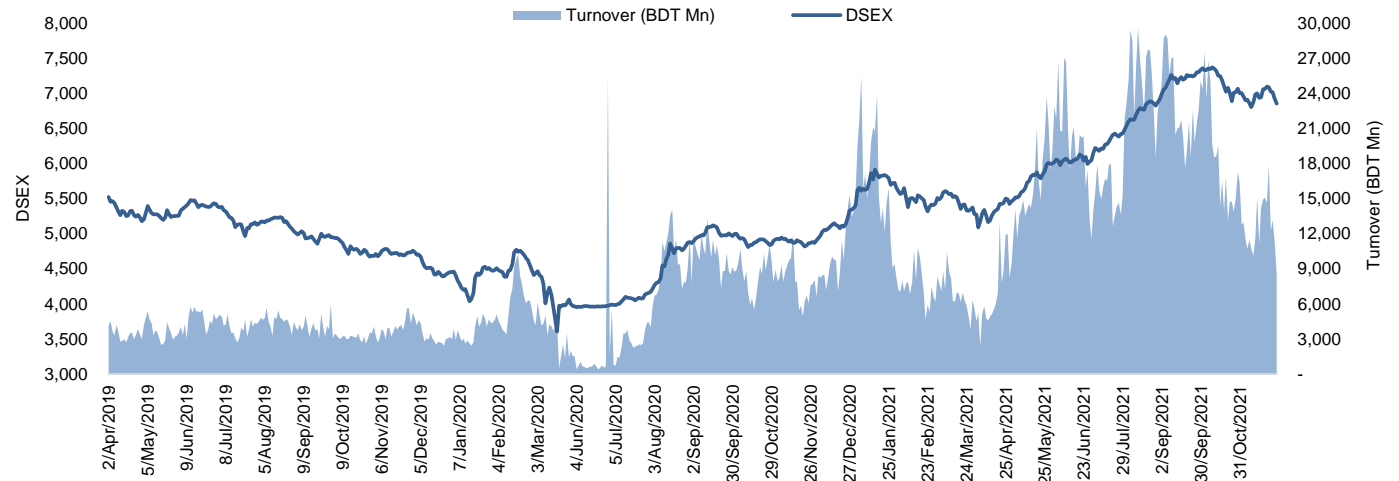


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.95%) lost 65.83 points and closed at 6,852.09. The blue-chip index DS30 (-1.08%), the Shariah-based index DSES (-0.66%), and the large-cap index CDSET (-0.99%) closed at 2,602.87, 1,442.38, and 1,399.27 points, respectively. All the large-cap sectors posted negative performance today. Bank experienced the highest loss of 1.53% followed by Fuel & Power (-1.06%), Engineering (-1.04%), NBF (I) (-0.67%), Pharmaceutical (-0.42%), Food & Allied (-0.23%), and Telecommunication (+0.00%), 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 1,170 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,852.09	6,917.92	-65.83	-0.95%	+26.8%
DS30	2,602.87	2,631.37	-28.50	-1.08%	+32.5%
DSES	1,442.38	1,452.01	-9.63	-0.66%	+16.1%
CDSET	1,399.27	1,413.30	-14.03	-0.99%	+24.6%

	Advanced	Declined	Unchanged	Total
All Category	89	241	32	362
A Category (Equity)	64	186	21	271
B Category (Equity)	15	28	8	51
N Category (Equity)	2	10	0	12
Z Category (Equity)	8	17	3	28
Mutual Funds	3	18	15	36
Corporate Bonds	1	1	0	2

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	5,460,974	5,497,397	-0.7%
	Mn USD	64,096	64,523	
Turnover	Mn BDT	8,498	11,296	-24.8%
	Mn USD	100	133	
Volume	Mn Shares	252	364	-30.8%
No. of Trade		140,920	165,731	-15.0%

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Figure: Sectorial Turnover (BDT)

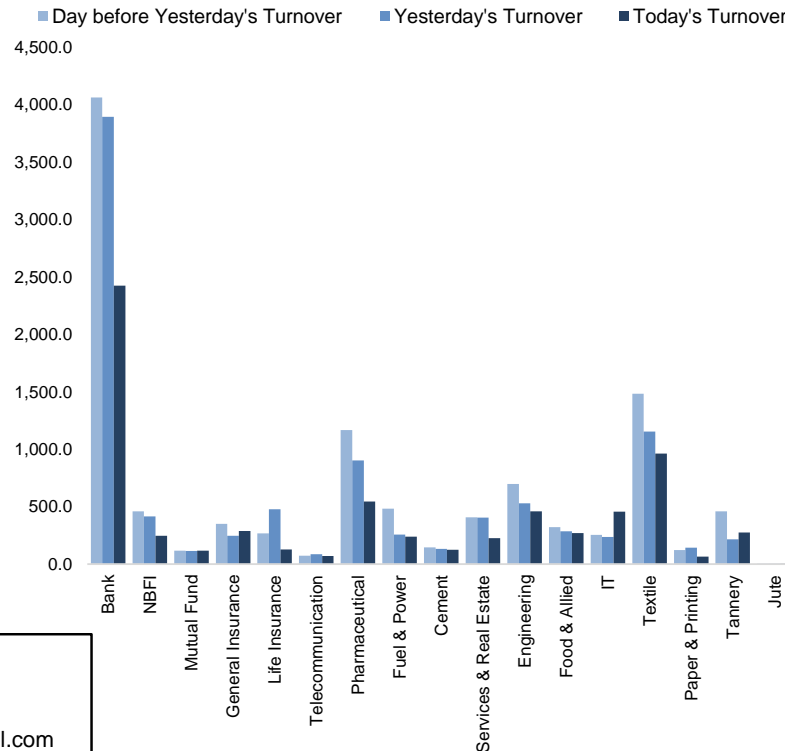
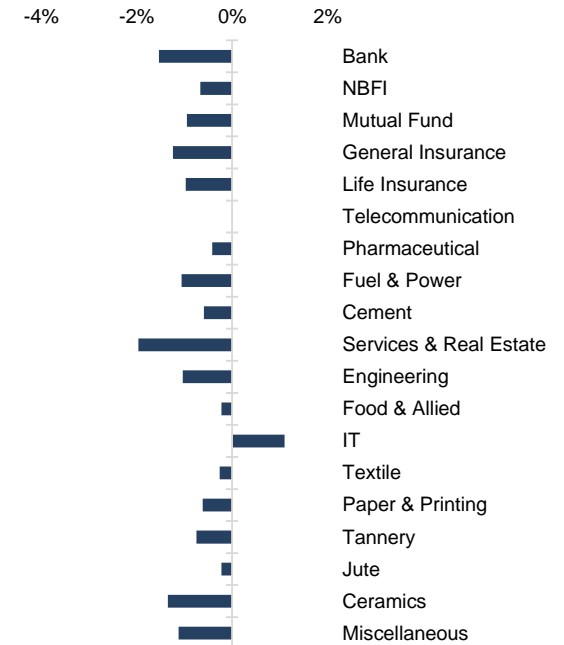


Figure: Sectorial Mcap Change



Market PE 16.9x
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	1,631	1,656	-25.41	-1.53%	32	748,295	15.4%	2,422.6	29.5%	8.3x	0.9x	GP	486,918	10.0%	28.9	13.4x	11.7x
NBFI	2,373	2,389	-15.90	-0.67%	23	225,826	4.7%	245.4	3.0%	21.3x	3.9x	BATBC	339,120	7.0%	110.3	24.7x	8.4x
Mutual Fund	929	937	-8.86	-0.94%	37	42,695	0.9%	117.7	1.4%	NM	0.8x	WALTONHIL	338,674	7.0%	7.7	22.3x	3.7x
General Insurance	4,885	4,946	-61.20	-1.24%	39	125,764	2.6%	287.5	3.5%	19.7x	2.1x	ROBI	203,232	4.2%	22.0	88.5x	3.1x
Life Insurance	2,727	2,753	-26.75	-0.97%	13	75,974	1.6%	128.6	1.6%	NM	NM	SQURPHARMA	193,512	4.0%	39.2	11.4x	2.0x
Telecommunication	6,170	6,170	+0.11	+0.00%	3	719,404	14.8%	69.7	0.8%	17.7x	6.2x	BEXIMCO	149,149	3.1%	1,170.5	14.8x	2.0x
Pharmaceutical	3,976	3,993	-16.65	-0.42%	32	721,593	14.9%	543.2	6.6%	19.1x	2.6x	UPGDCL	145,619	3.0%	33.1	13.4x	4.1x
Fuel & Power	1,805	1,824	-19.31	-1.06%	23	469,273	9.7%	238.0	2.9%	11.6x	1.2x	RENATA	139,865	2.9%	20.5	26.9x	5.2x
Cement	2,589	2,604	-15.34	-0.59%	7	132,842	2.7%	125.3	1.5%	18.4x	2.7x	BXPBARMA	95,245	2.0%	81.6	17.3x	2.5x
Services & Real Estate	1,331	1,357	-26.62	-1.96%	8	52,533	1.1%	225.1	2.7%	NM	1.0x	ICB	94,200	1.9%	4.8	66.7x	2.1x
Engineering	4,697	4,746	-49.14	-1.04%	42	549,050	11.3%	459.8	5.6%	18.2x	2.0x	LHBL	87,800	1.8%	101.6	22.2x	4.6x
Food & Allied	24,771	24,827	-55.92	-0.23%	20	437,392	9.0%	270.7	3.3%	29.9x	8.8x	BERGERPBL	82,168	1.7%	1.2	26.4x	6.9x
IT	3,493	3,455	+38.05	+1.10%	11	42,347	0.9%	456.3	5.5%	36.2x	3.0x	BRACBANK	72,950	1.5%	81.2	12.7x	1.5x
Textile	1,556	1,560	-4.05	-0.26%	58	162,180	3.3%	962.7	11.7%	34.9x	1.0x	MARICO	72,167	1.5%	3.0	21.9x	30.7x
Paper & Printing	7,229	7,274	-44.63	-0.61%	6	21,723	0.4%	64.1	0.8%	NM	1.5x	DUTCHBANGL	51,486	1.1%	59.1	8.8x	1.5x
Tannery	3,092	3,115	-23.35	-0.75%	6	33,702	0.7%	275.5	3.4%	NM	3.4x	BEACONPHAR	51,097	1.1%	8.7	50.6x	9.7x
Jute	7,663	7,680	-17.33	-0.23%	3	1,850	0.0%	4.3	0.1%	NM	18.6x	ISLAMIBANK	50,393	1.0%	7.4	9.4x	0.8x
Ceramics	681	690	-9.29	-1.35%	5	30,825	0.6%	36.1	0.4%	31.5x	2.0x	SUMITPOWER	41,861	0.9%	15.8	7.9x	1.1x
Miscellaneous	5,083	5,141	-57.77	-1.12%	14	262,000	5.4%	1,291.9	15.7%	18.8x	2.4x	POWERGRID	38,131	0.8%	42.2	11.5x	0.4x
												EBL	36,151	0.7%	11.0	6.7x	1.2x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SKICL	40.9	+9.9%	0.8	15.4x	2.2x
ACMEPL	25.6	+9.9%	0.2	15.7x	1.4x
SHURWID	17.0	+9.7%	35.7	7.7x	1.3x
ANWARGALV	365.1	+6.7%	34.2	49.2x	21.8x
NEWLIN	38.6	+6.0%	23.5	22.3x	1.6x
DSHGARME	153.4	+5.9%	8.7	NM	7.6x
AMANFEED	59.1	+5.2%	80.5	23.0x	1.8x
GEMINISEA	233.9	+4.9%	20.1	38.9x	93.9x
ARAMITCEM	38.2	+4.7%	4.8	35.1x	1.3x
SAMATALETH	70.9	+4.6%	1.3	NM	4.9x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	126,615	6.9%	11.4x	2.0x
BEXIMCO	103,584	5.6%	14.8x	2.0x
BATBC	89,697	4.9%	24.7x	8.4x
RENATA	68,282	3.7%	26.9x	5.2x
BXPBARMA	66,500	3.6%	17.3x	2.5x
GP	48,692	2.7%	13.4x	11.7x
BRACBANK	39,218	2.1%	12.7x	1.5x
BEACONPHAR	35,767	1.9%	50.6x	9.7x
LHBL	31,011	1.7%	22.2x	4.6x
EBL	25,241	1.4%	6.7x	1.2x
ISLAMIBANK	24,532	1.3%	9.4x	0.8x
ROBI	20,222	1.1%	88.5x	3.1x
IFIC	20,082	1.1%	15.4x	1.1x
CITYBANK	19,842	1.1%	6.6x	0.9x
OLYMPIC	19,478	1.1%	17.1x	3.3x
PUBALIBANK	18,880	1.0%	5.2x	0.7x
NBL	17,776	1.0%	7.0x	0.5x
ALARABANK	16,466	0.9%	10.2x	1.2x
DELTALIFE	16,176	0.9%	NM	NM
ORIONPHARM	16,060	0.9%	28.9x	1.3x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEXIMCO	170.2	-2.1%	1,170.5	14.8x	2.0x
ONEBANKLTD	18.9	+2.2%	602.8	9.6x	1.0x
PTL	97.5	+3.4%	448.6	23.5x	3.6x
IFIC	18.7	-2.6%	374.4	15.4x	1.1x
GENEXIL	163.7	+2.6%	355.7	48.5x	9.2x
FIRSTSBANK	14.1	-2.1%	275.5	5.0x	0.7x
FORTUNE	96.0	-1.7%	267.8	41.2x	6.5x
NRBCBANK	32.0	+3.2%	213.6	12.5x	2.0x
SAIFPOWER	41.7	-3.0%	145.9	23.3x	2.5x
ORIONPHARM	100.9	+2.4%	133.1	28.9x	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
LRGLOBMF1	7.3	-9.9%	24.7	NM	0.8x
SHYAMPSUG	71.2	-9.4%	2.3	NM	NM
NTC	534.2	-6.0%	0.2	NM	6.1x
KDSALTD	64.0	-5.7%	29.0	26.9x	2.5x
PENINSULA	33.7	-5.6%	60.0	82.2x	1.1x
BENGALWTL	21.5	-5.3%	6.5	38.3x	0.9x
DACCADYE	21.7	-5.2%	29.7	37.9x	2.5x
BARKAPOWER	24.1	-5.1%	13.7	8.1x	1.1x
CITYGENINS	40.9	-4.7%	31.1	17.8x	2.2x
JANATAINS	41.8	-4.6%	10.3	30.4x	2.7x

Block Trade	Maximum Price (BDT)	Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PTL	94.8	88.0	10.0	589	55.14
PROVATIINS	120.0	120.0	3.0	365	43.80
LINDEBD	1,400.0	1,400.0	1.0	20	28.00
RENATA	1,305.0	1,305.0	1.0	21	27.41
EASTERNINS	112.0	112.0	2.0	177	19.82
SQURPHARMA	220.0	220.0	2.0	70	15.40
AMANFEED	56.2	56.0	4.0	187	10.47
RDFOOD	56.0	55.4	2.0	180	10.03
GENEXIL	165.0	165.0	1.0	60	9.90
BNICL	125.0	125.0	1.0	70	8.75

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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
PTL	94.8	88.0	55.1	589	10
PROVATIINS	120.0	120.0	43.8	365	3
LINDEBD	1,400.0	1,400.0	28.0	20	1
RENATA	1,305.0	1,305.0	27.4	21	1
EASTERNINS	112.0	112.0	19.8	177	2
SQURPHARMA	220.0	220.0	15.4	70	2
AMANFEED	56.2	56.0	10.5	187	4
RDFOOD	56.0	55.4	10.0	180	2
GENEXIL	165.0	165.0	9.9	60	1
BNICL	125.0	125.0	8.8	70	1
SHAHJABANK	23.8	23.8	5.5	233	3
KAY&QUE	251.0	251.0	4.8	19	1
ORIONPHARM	108.0	108.0	4.5	42	1
BEXIMCO	185.0	180.5	3.7	20	3
ACI	301.0	291.0	3.6	12	2
WALTONHIL	1,060.0	1,060.0	3.2	3	1
DELTALIFE	226.0	226.0	3.1	14	1
FIRSTSBANK	14.7	14.7	2.9	200	2
PHOENIXFIN	27.0	27.0	2.8	103	2
BEACONPHAR	205.1	205.1	2.8	14	2
ONEBANKLTD	18.2	17.1	2.2	125	4
SILVAPHL	17.0	17.0	1.6	95	1
Total			273.2		54

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Hamid Fabrics Limited	-	0.0%	5.0%	Record Date	28-Nov-21
Active Fine Chemicals Limited	-	0.0%	0.5%	Record Date	28-Nov-21
AFC Agro Biotech Ltd.	-	0.0%	0.5%	Record Date	28-Nov-21
Bd.Thai Aluminium Ltd.	-	0.0%	2.0%	Record Date	28-Nov-21
Bangas Ltd.	-	0.0%	4.0%	Record Date	28-Nov-21
Sonargaon Textile Ltd.	-	0.0%	0.0%	Record Date	28-Nov-21
H.R.Textile Ltd.	-	5.0%	5.0%	Record Date	29-Nov-21
Rangpur Dairy & Food Products Ltd.	-	3.0%	3.0%	Record Date	29-Nov-21
Orion Infusion Ltd.	-	0.0%	10.0%	Record Date	29-Nov-21
Orion Pharma Ltd.	-	0.0%	12.0%	Record Date	29-Nov-21
Sinobangla Industries Ltd.	-	0.0%	10.0%	Record Date	30-Nov-21
New Line Clothings Limited	-	0.0%	12.3%	Record Date	30-Nov-21
Legacy Footwear Ltd.	-	0.0%	1.0%	Record Date	30-Nov-21
Bashundhara Paper Mills Limited	-	0.0%	12.0%	Record Date	30-Nov-21
Alif Industries Limited	-	0.0%	10.0%	Record Date	30-Nov-21
Alif Industries Limited	-	0.0%	5.0%	Record Date	30-Nov-21

Important DSE News
SSSTEEL

The Board of Directors recommended 2% cash dividend for General Shareholders other than Sponsors and Directors and 8% stock dividend for all shareholders for the year ended on 30 June, 2021. The Sponsors & Directors hold 9,67,34,978 shares out of total 30,42,90,000 shares of the Company and the cash dividend to be payable to the General shareholders is Tk. 4,15,11,004.40. Date of AGM: 31.12.2021, Time: 11:00 AM, Venue: Digital Platform. Record Date: 15.12.2021. The Stock Dividend is subject to approval of shareholders in the AGM and subsequent approval of the BSEC. Another Record date for entitlement of Stock Dividend will be notified later after getting approval from BSEC as per BSEC Notification No. BSEC/CMRRCD/2009-193/23/Admin /123; Dated June 30, 2021. The Company has also reported Consolidated EPS of Tk. 2.31, Consolidated NAV per share (with revaluation) of Tk. 23.58, Consolidated NAV per share (without revaluation) of Tk. 20.95 and Consolidated NOCFPS of Tk. 2.01 for the year ended on June 30, 2021 as against Tk. 1.55 (Solo), Tk. 17.48 (Solo), Tk. 14.98 (Solo) and Tk. 2.46 (Solo) respectively for the same period of the previous year.

The Board has also approved Tk. 20.00 crore for purchasing Land, Building and Capital Machineries for business expansion. The Company also informed that reasons for declaration of stock dividend: i) Bonus shares have been recommended in view to utilize its retained amount as capital for business expansion; ii) Bonus shares are declared out of accumulated profit; and iii) Bonus shares are not declared from Capital reserve or revaluation reserve or any unrealized gain or out of profit earned prior to incorporation of the Company or through reducing paid up capital or through doing anything. So that the post dividend retained earnings become negative or a debit balance.

OLYMPIC

Reference to the company's news dated on 23.11.2021, the company has further informed that out of total investment of Tk. 25,65,50,000/-, a total of Tk. 17,50,00,000/- is for construction related works. The investment on this BMRE will also increase its safety and future value. Another Tk. 1,66,50,000/- will be used for enhancement of Carton Production which is our packing material and not sold externally. The remaining balance of Tk. 6,49,00,000/- will be spent to set up Cup Cake making line. At full capacity utilization, which we anticipate will take 3 to 4 years, Cup Cake Line will generate approximately Tk. 76.02 crore of annual turnover. On the basis of existing average net profit rate of 11.30%, as per June 30, 2021 audited financial statements, at full capacity utilization, it is estimated that this line will generate approximately Tk. 8.59 crore of annual net profit.

GENEXIL

Chowdhury Fazle Imam one of the Directors of the company, has expressed his intention to transfer 25,00,000 shares out of his total holding of 1,47,85,835 shares of the Company to his wife Nilofar Imam (General Shareholder), by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of approval letter by DSE.

Gupa Saha one of the Sponsors of the company, has expressed her intention to transfer 3,80,000 shares out of her total holding of 18,72,200 shares of the Company to her Mother Debi Rani Saha (General Shareholder), by way of gift outside the trading system of the Exchange within next 30 working days from the date of issuance of approval letter by DSE.

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