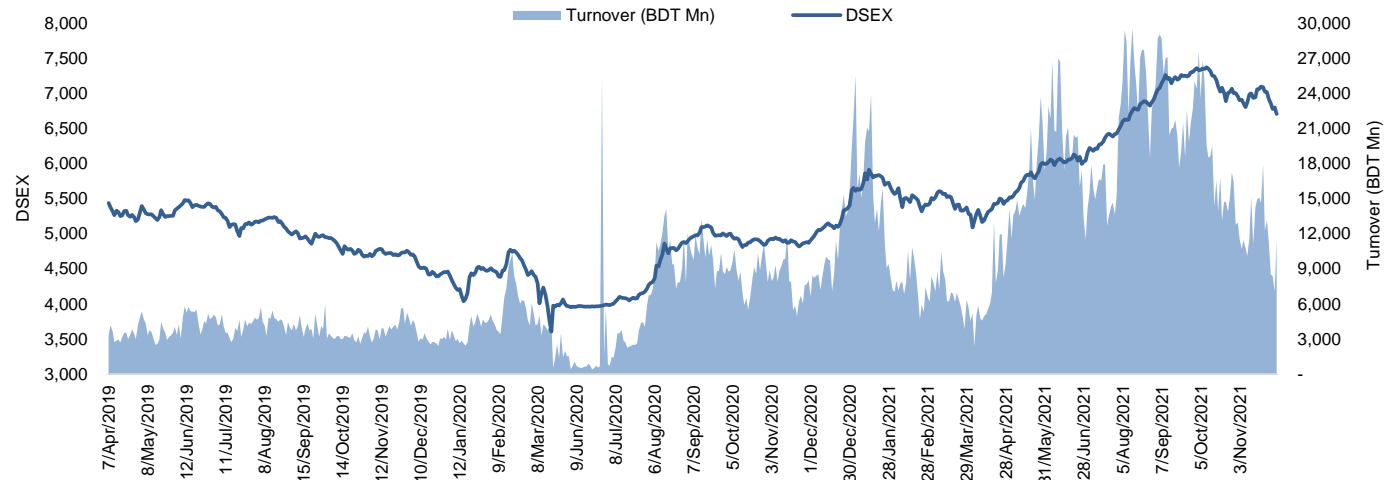


Daily Market Update

The market closed in red today. The benchmark index DSEX (-1.36%) lost 92.26 points and closed at 6,703.26. The blue-chip index DS30 (-1.99%), the Shariah-based index DSES (-1.77%), and the large-cap index CDSET (-1.80%) closed at 2,516.28, 1,405.55, and 1,354.00 points, respectively. All the large-cap sectors posted negative performance today. Telecommunication experienced the highest loss of 2.64% followed by Pharmaceutical (-1.29%), Engineering (-1.24%), NBFi (-1.18%), Food & Allied (-0.93%), Fuel & Power (-0.89%), and Bank (-0.56%), respectively. Block trades contributed 0.5% of the overall market turnover. One Bank Limited (+6.3%) was the most traded share with a turnover of BDT 1,899 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,703.26	6,795.51	-92.26	-1.36%	+24.1%
DS30	2,516.28	2,567.38	-51.10	-1.99%	+28.1%
DSES	1,405.55	1,430.88	-25.33	-1.77%	+13.2%
CDSET	1,354.00	1,378.83	-24.83	-1.80%	+20.6%

	Advanced	Declined	Unchanged	Total
All Category	65	266	40	371
A Category (Equity)	37	206	30	273
B Category (Equity)	9	41	6	56
N Category (Equity)	5	7	0	12
Z Category (Equity)	14	12	4	30
Mutual Funds	1	17	18	36
Corporate Bonds	0	1	0	1

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	5,364,947	5,432,183	-1.2%
	Mn USD	62,969	63,758	
Turnover	Mn BDT	11,469	7,082	+61.9%
	Mn USD	135	83	
Volume	Mn Shares	321	174	+84.3%
No. of Trade		167,514	129,335	+29.5%

Figure: Sectorial Turnover (BDT)

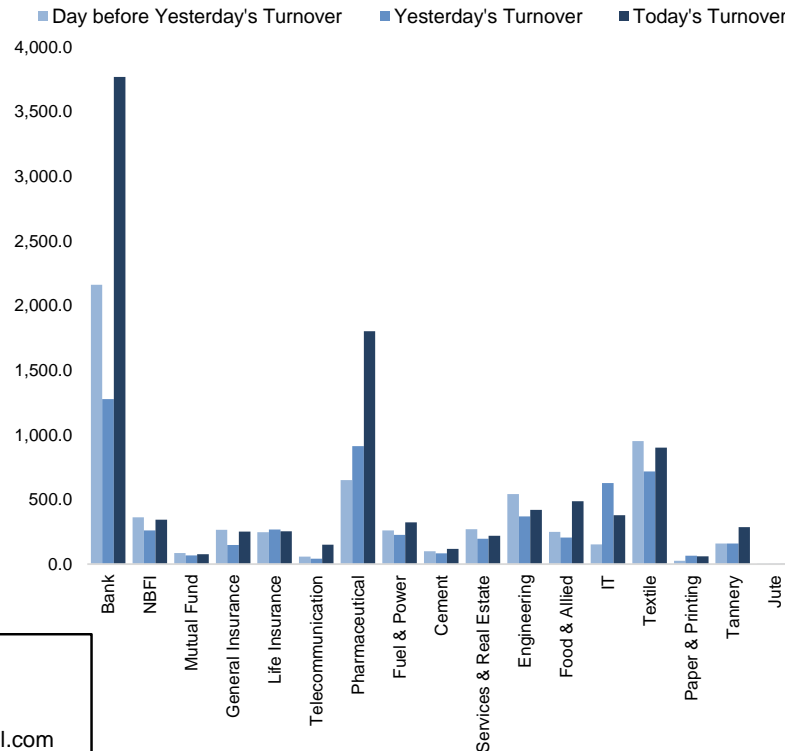
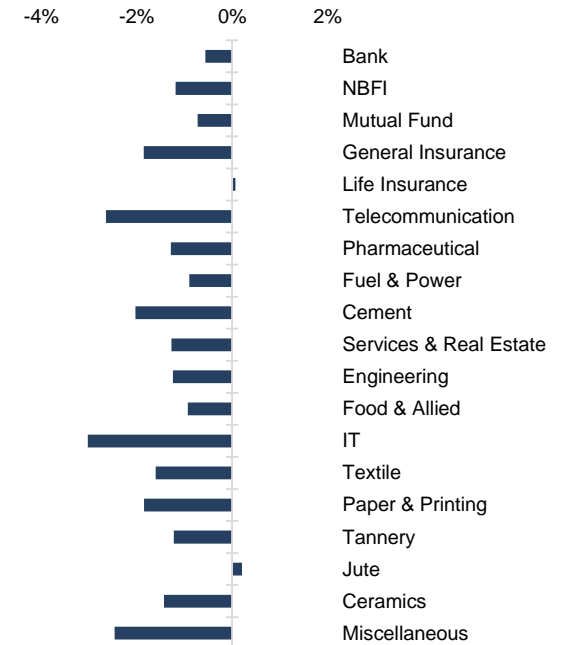


Figure: Sectorial Mcap Change



Market PE 16.5x
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	1,729	1,739	-9.70	-0.56%	32	746,566	15.7%	3,768.1	34.3%	8.3x	0.9x	GP	470,309	9.9%	97.9	13.0x	11.3x
NBFI	2,352	2,380	-28.12	-1.18%	23	222,726	4.7%	344.1	3.1%	21.1x	3.9x	BATBC	335,016	7.0%	344.4	24.4x	8.3x
Mutual Fund	956	963	-6.97	-0.72%	37	42,007	0.9%	76.8	0.7%	NM	0.8x	WALTONHIL	334,039	7.0%	12.2	22.0x	3.6x
General Insurance	5,417	5,519	-102.29	-1.85%	39	121,587	2.6%	250.6	2.3%	19.1x	2.1x	ROBI	199,041	4.2%	34.5	86.7x	3.0x
Life Insurance	2,910	2,908	+2.09	+0.07%	13	74,973	1.6%	254.2	2.3%	NM	NM	SQURPHARMA	187,750	3.9%	385.4	11.0x	1.9x
Telecommunication	5,820	5,978	-157.87	-2.64%	3	698,803	14.7%	149.0	1.4%	17.2x	6.0x	UPGDCL	142,199	3.0%	25.1	13.1x	4.0x
Pharmaceutical	3,897	3,948	-50.76	-1.29%	32	705,278	14.8%	1,802.3	16.4%	18.7x	2.6x	RENATA	138,333	2.9%	16.0	26.6x	5.1x
Fuel & Power	1,759	1,775	-15.88	-0.89%	23	461,852	9.7%	321.9	2.9%	11.4x	1.2x	BEXIMCO	133,200	2.8%	986.2	13.2x	1.8x
Cement	2,553	2,606	-52.86	-2.03%	7	129,671	2.7%	118.6	1.1%	18.0x	2.7x	ICB	92,588	1.9%	9.7	65.6x	2.1x
Services & Real Estate	1,402	1,420	-18.01	-1.27%	8	52,575	1.1%	218.8	2.0%	NM	1.0x	BXPHERMA	85,877	1.8%	491.7	15.6x	2.2x
Engineering	4,588	4,645	-57.61	-1.24%	42	540,481	11.4%	418.6	3.8%	18.0x	2.0x	LHBL	85,361	1.8%	88.7	21.6x	4.4x
Food & Allied	25,565	25,804	-239.55	-0.93%	20	432,422	9.1%	486.5	4.4%	29.6x	8.7x	BERGERPBL	81,620	1.7%	1.2	26.2x	6.8x
IT	3,483	3,592	-108.69	-3.03%	11	41,044	0.9%	377.1	3.4%	35.1x	2.9x	BRACBANK	75,456	1.6%	264.6	13.1x	1.5x
Textile	1,563	1,588	-25.40	-1.60%	58	158,772	3.3%	901.0	8.2%	34.2x	1.0x	MARICO	71,836	1.5%	4.1	21.8x	30.5x
Paper & Printing	7,597	7,740	-142.60	-1.84%	6	20,326	0.4%	60.8	0.6%	NM	1.4x	BEACONPHAR	51,652	1.1%	29.2	59.8x	9.6x
Tannery	3,253	3,293	-40.31	-1.22%	6	33,125	0.7%	286.6	2.6%	NM	3.3x	DUTCHBANGL	51,359	1.1%	64.7	8.8x	1.5x
Jute	8,358	8,341	+17.32	+0.21%	3	1,845	0.0%	2.2	0.0%	NM	18.6x	ISLAMIBANK	50,393	1.1%	8.3	9.4x	0.8x
Ceramics	660	669	-9.56	-1.43%	5	30,351	0.6%	34.8	0.3%	31.1x	1.9x	SUMITPOWER	41,540	0.9%	20.7	7.8x	1.1x
Miscellaneous	4,908	5,032	-123.77	-2.46%	14	245,678	5.2%	1,122.6	10.2%	17.6x	2.2x	POWERGRID	37,988	0.8%	33.3	11.5x	0.4x
												EBL	36,342	0.8%	8.1	6.7x	1.2x

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	90.7	+9.9%	132.7	55.8x	6.6x
SKICL	54.2	+9.9%	4.1	20.4x	3.0x
ACMEPL	33.9	+9.7%	66.1	20.7x	1.8x
NATLIFEINS	206.2	+6.8%	1.6	NM	NM
ONEBANKLTD	20.1	+6.3%	1,899.4	10.2x	1.0x
RENWICKJA	946.2	+6.0%	0.2	NM	NM
ACFL	30.9	+5.1%	11.7	25.3x	0.9x
EASTRNLU	2,440.8	+5.0%	29.2	66.3x	11.5x
SHYAMPSUG	73.2	+4.9%	0.8	NM	NM
MONOSPOOL	140.9	+4.8%	1.8	NM	3.5x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	122,845	6.8%	11.0x	1.9x
BEXIMCO	92,508	5.1%	13.2x	1.8x
BATBC	88,612	4.9%	24.4x	8.3x
RENATA	67,534	3.8%	26.6x	5.1x
BXPHERMA	59,959	3.3%	15.6x	2.2x
GP	47,031	2.6%	13.0x	11.3x
BRACBANK	40,565	2.3%	13.1x	1.5x
BEACONPHAR	36,155	2.0%	59.8x	9.6x
LHBL	30,149	1.7%	21.6x	4.4x
EBL	25,374	1.4%	6.7x	1.2x
ISLAMIBANK	24,532	1.4%	9.4x	0.8x
IFIC	20,405	1.1%	15.6x	1.1x
ROBI	19,805	1.1%	86.7x	3.0x
CITYBANK	19,555	1.1%	6.5x	0.9x
OLYMPIC	19,284	1.1%	16.9x	3.3x
PUBALIBANK	18,669	1.0%	5.1x	0.7x
NBL	17,776	1.0%	7.0x	0.5x
ORIONPHARM	16,490	0.9%	29.7x	1.3x
ALARABANK	16,342	0.9%	10.2x	1.2x
DELTALIFE	15,595	0.9%	NM	NM

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ONEBANKLTD	20.1	+6.3%	1,899.4	10.2x	1.0x
BEXIMCO	152.0	-4.3%	986.2	13.2x	1.8x
BXPHERMA	192.5	-3.9%	491.7	15.6x	2.2x
IFIC	19.0	+1.6%	391.6	15.6x	1.1x
PTL	94.7	-4.4%	390.8	22.8x	3.5x
SQURPHARMA	211.8	-2.5%	385.4	11.0x	1.9x
ORIONPHARM	103.6	+2.0%	368.2	29.7x	1.3x
BATBC	620.4	-1.0%	344.4	24.4x	8.3x
GENEXIL	156.7	-4.9%	327.0	46.4x	8.8x
FORTUNE	92.8	-1.7%	282.0	39.8x	6.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ARAMITCEM	33.7	-9.9%	2.7	74.9x	1.2x
NRBCBANK	28.9	-6.5%	229.1	11.2x	1.8x
SONARBAINS	68.6	-6.4%	19.6	33.8x	3.4x
SHURWID	15.1	-5.0%	11.4	6.9x	1.2x
GENNEXT	5.8	-4.9%	7.1	NM	0.5x
GENEXIL	156.7	-4.9%	327.0	46.4x	8.8x
SPCL	92.7	-4.8%	85.9	12.9x	2.3x
ATLASBANG	94.8	-4.8%	0.1	NM	0.7x
MITHUNKNIT	12.0	-4.8%	0.7	NM	0.6x
DESHBANDHU	20.2	-4.7%	21.1	32.5x	1.1x

Block Trade	Maximum Price (BDT)	Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
PROVATIINS	118.0	115.0	2.0	1,050	121.50
PTL	98.0	95.0	7.0	800	78.25
ONEBANKLTD	19.0	18.0	12.0	2,414	44.65
RENATA	1,298.0	1,298.0	1.0	31	40.24
GP	351.7	351.7	1.0	76	26.57
EASTERNINS	116.7	116.7	1.0	200	23.34
MARICO	2,290.0	2,290.0	1.0	10	22.90
BRACBANK	55.8	54.9	7.0	325	17.88
KTL	34.8	34.8	1.0	450	15.66
NRBCBANK	33.8	33.4	3.0	400	13.44

*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
PROVATIINS	118.0	115.0	121.5	1,050	2
PTL	98.0	95.0	78.3	800	7
ONEBANKLTD	19.0	18.0	44.6	2,414	12
RENATA	1,298.0	1,298.0	40.2	31	1
GP	351.7	351.7	26.6	76	1
EASTERNINS	116.7	116.7	23.3	200	1
MARICO	2,290.0	2,290.0	22.9	10	1
BRACBANK	55.8	54.9	17.9	325	7
KTL	34.8	34.8	15.7	450	1
NRBCBANK	33.8	33.4	13.4	400	3
FORTUNE	103.8	90.0	11.0	119	4
BEXIMCO	158.0	158.0	10.9	69	1
GENEXIL	165.0	165.0	10.7	65	1
BARKAPOWER	21.6	21.6	9.4	435	1
RDFOOD	53.0	50.5	3.1	60	2
SAIFPOWER	40.7	40.7	3.1	75	1
MBL1STMF	8.2	8.2	2.8	345	1
MALEKSPIN	32.9	32.9	2.7	81	1
DBH1STMF	7.9	7.9	2.5	312	1
BXPHERMA	215.0	215.0	1.9	9	2
BDFINANCE	68.8	68.8	1.7	25	1
SILVAPHL	17.0	17.0	1.7	100	1
Total			474.4		62

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Silva Pharmaceuticals Limited	-	0.0%	5.0%	Record Date	1-Dec-21
Investment Corporation of Bangladesh	-	0.0%	11.0%	Record Date	1-Dec-21
Atlas Bangladesh Ltd.	-	0.0%	0.0%	Record Date	1-Dec-21
Golden Son Ltd.	-	0.0%	2.8%	Record Date	1-Dec-21
Shahjibazar Power Co. Ltd.	-	4.0%	28.0%	Record Date	2-Dec-21
Rahima Food Corporation Limited	-	0.0%	1.0%	Record Date	2-Dec-21
Western Marine Shipyard Limited	-	0.0%	0.0%	Record Date	2-Dec-21
Fu Wang Food Ltd.	-	0.0%	0.0%	Record Date	2-Dec-21
Esquire Knit Composite Limited	-	0.0%	15.0%	Record Date	5-Dec-21
Meghna Cement Mills Ltd.	-	5.0%	5.0%	Record Date	5-Dec-21
Ambee Pharmaceuticals Ltd.	-	0.0%	0.0%	Record Date	5-Dec-21
Hakkani Pulp & Paper Mills Ltd.	-	0.0%	1.0%	Record Date	5-Dec-21
Samata Leather Complex Ltd.	-	0.0%	0.5%	Record Date	5-Dec-21
Salvo Chemical Industry Limited	-	0.0%	2.0%	Record Date	6-Dec-21
Paper Processing & Packaging Limited	-	0.0%	10.0%	Record Date	6-Dec-21
Bangladesh Monospool Paper Manufacturing Co	-	0.0%	10.0%	Record Date	6-Dec-21

Important DSE News
ARAMIT

(Q1 Un-audited): EPS was Tk. 1.14 for July-September, 2021 as against Tk. 0.67 for July-September, 2020. NOCFPS was Tk. (6.83) for July-September, 2021 as against Tk. (4.30) for July-September, 2020. NAV per share was Tk. 192.53 as on September 30, 2021 and Tk. 181.42 as on June 30, 2021.

ARAMITCEM

(Q1 Un-audited): EPS was Tk. (1.96) for July-September, 2021 as against Tk. (1.32) for July-September, 2020. NOCFPS was Tk. 0.14 for July-September, 2021 as against Tk. 3.19 for July-September, 2020. NAV per share was Tk. 27.19 as on September 30, 2021 and Tk. 29.13 as on June 30, 2021.

SONARBAINS

(Q3 Un-audited): Consolidated EPS was Tk. 0.06 for July-September 2021 as against Tk. 0.26 for July-September 2020; Consolidated EPS was Tk. 1.97 for January-September 2021 as against Tk. 1.86 for January-September 2020. Consolidated NOCFPS was Tk. 3.43 for January-September 2021 as against Tk. 3.68 for January-September 2020. Consolidated NAV per share was Tk. 20.42 as on September 30, 2021 and Tk. 19.62 as on September 30, 2020.

SEAPEARL

The Company has informed that the Board of Directors has decided to operate a hotel business at Baridhara Diplomatic Zone in Dhaka on a rental agreement basis. A hotel namely La Villa Western will be operated by Sea Pearl Beach Resort and Spa Limited. Floor space of the proposed hotel is 15,000 sqft (Approx). The building is 8 storied with 26 rooms and two restaurants measuring 1000 sqft and 1700 sqft respectively. Estimated total cost for renovation & other cost of the hotel is BDT 1.5 Crore (Approx). The new hotel operation will contribute an additional estimated yearly revenue of BDT 4.00 Crore (Approx).

PTL

The Company has informed that the Board of Directors has decided to invest for an amount of around USD 85.45 million for capital machineries, civil construction & other auxiliaries work for enhancing its production capacity which will generate extra around USD 07 Million/monthly revenue and the post import facilities will be settle down through foreign currency term loan facilities.

APSCLBOND

As per Regulation 19(1) of the Dhaka Stock Exchange (Listing) Regulations, 2015, the Company has informed that a meeting of the Board of Trustee will be held on December 12, 2021 at 3:00 PM to consider, among others, audited financial statements of the Company for the half yearly Coupon Rate.

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