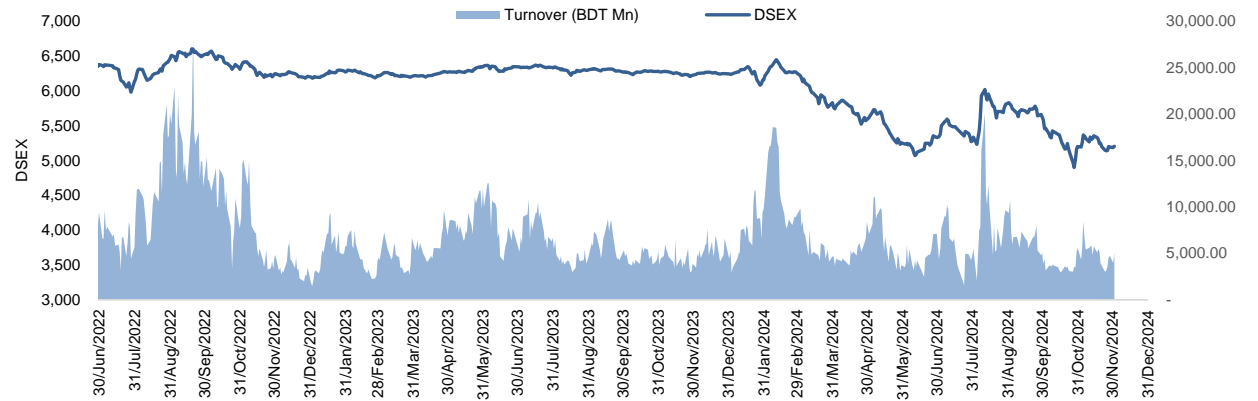


**Daily Market Update**

The market closed in green today. The benchmark index DSEX (+0.33%) gained 16.89 points and closed at 5,201.94. The blue-chip index DS30 (+0.13%), the Shariah-based index DSES (+0.25%), and the large-cap index CDSET (+0.11%) closed at 1,913.51, 1,168.43, and 1,052.58 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 2.07% followed by Telecommunication (+0.39%), Pharmaceutical (+0.37%), Bank (+0.33%), Food & Allied (+0.16%), Engineering (+0.03%), and Fuel & Power (-0.10%), respectively. Block trades contributed 1.8% of the overall market turnover. NRB Bank Limited (+0.7%) was the most traded share with a turnover of BDT 305 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,201.94	5,185.05	+16.89	+0.33%	-16.7%
DS30	1,913.51	1,911.04	+2.48	+0.13%	-8.6%
DSES	1,168.43	1,165.54	+2.90	+0.25%	-14.3%
CDSET	1,052.58	1,051.38	+1.20	+0.11%	-12.5%

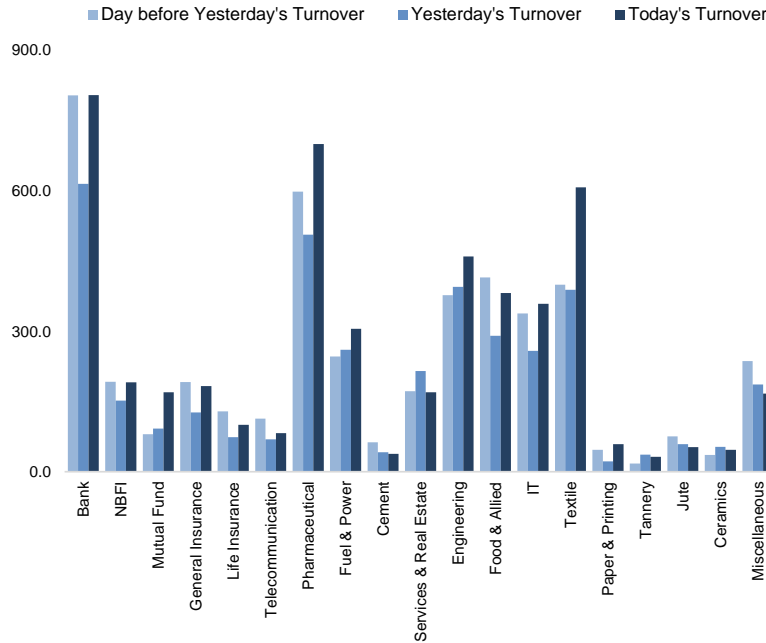
	Advanced	Declined	Unchanged	Total
<b>All Category</b>	238	98	61	397
<b>A Category (Equity)</b>	141	56	34	231
<b>B Category (Equity)</b>	46	23	11	80
<b>N Category (Equity)</b>	3	0	0	3
<b>Z Category (Equity)</b>	48	19	16	83
<b>Mutual Funds</b>	20	2	15	37
<b>Corporate Bonds</b>	0	0	2	2
<b>Treasury Bonds</b>	1	4	0	5

		Today	Last Day	Daily %Δ
<b>Mcap</b>	Mn BDT	6,650,029	6,618,538	+0.5%
	Mn USD	55,417	55,154	
<b>Turnover</b>	Mn BDT	5,002	3,973	+25.9%
	Mn USD	42	33	
<b>Volume</b>	Mn Shares	212	167	+27.2%
<b>No. of Trade</b>		164,449	141,577	+16.2%

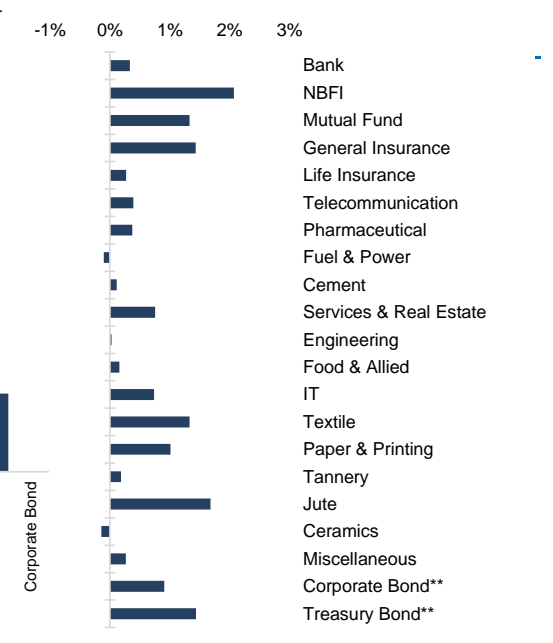
\* Average Interbank Exchange Rate is BDT 120.00 as of Dec 02, 2024

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**Figure: Sectorial Turnover (BDT Mn)**



**Figure: Sectorial Mcap Change**



**Market PE** 14.8x  
**Market PB** 1.2x

\* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

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	1,452	1,447	+4.84	+0.33%	36	686,896	10.3%	804.5	16.4%	8.9x	0.7x	GP	431,016	11.9%	52.0	12.2x	7.5x
NBFI	1,326	1,299	+26.90	+2.07%	23	126,350	1.9%	190.8	3.9%	NM	NM	BATBC	190,728	5.3%	21.8	10.9x	3.1x
Mutual Fund	613	605	+8.04	+1.33%	37	28,176	0.4%	169.9	3.5%	NM	0.5x	SQURPHARMA	185,268	5.1%	23.4	8.8x	1.4x
General Insurance	2,833	2,793	+40.09	+1.44%	43	80,872	1.2%	182.8	3.7%	14.6x	1.2x	WALTONHIL	147,253	4.1%	4.3	11.3x	1.3x
Life Insurance	1,923	1,918	+5.20	+0.27%	15	51,152	0.8%	100.4	2.0%	NM	NM	ROBI	136,186	3.8%	25.4	24.8x	2.1x
Telecommunication	5,024	5,004	+19.63	+0.39%	3	589,104	8.9%	82.6	1.7%	13.9x	4.2x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,910	2,899	+10.85	+0.37%	34	551,582	8.3%	699.7	14.2%	14.0x	1.5x	BRACBANK	85,477	2.4%	59.4	7.7x	1.1x
Fuel & Power	1,152	1,153	-1.16	-0.10%	23	304,887	4.6%	305.2	6.2%	14.5x	0.6x	ISLAMIBANK	84,525	2.3%	59.1	18.1x	1.2x
Cement	2,002	2,000	+2.25	+0.11%	7	95,417	1.4%	38.5	0.8%	16.0x	2.0x	BERGERPBL	81,736	2.3%	0.3	24.6x	5.1x
Services & Real Estate	1,080	1,072	+8.07	+0.75%	9	59,378	0.9%	169.6	3.5%	19.8x	0.4x	UPGDCL	75,824	2.1%	5.1	7.3x	2.0x
Engineering	2,533	2,532	+0.72	+0.03%	42	285,742	4.3%	460.0	9.4%	12.5x	0.9x	MARICO	72,982	2.0%	1.5	13.8x	9.6x
Food & Allied	16,874	16,848	+26.52	+0.16%	21	308,750	4.6%	381.4	7.8%	16.5x	4.4x	LHB	62,830	1.7%	5.3	15.5x	3.1x
IT	2,124	2,108	+15.53	+0.74%	11	28,010	0.4%	358.9	7.3%	20.6x	1.8x	ICB	62,443	1.7%	61.5	32.1x	1.4x
Textile	1,107	1,093	+14.52	+1.33%	58	114,923	1.7%	607.5	12.4%	72.7x	0.8x	UNILEVERCL	50,672	1.4%	0.0	68.9x	21.6x
Paper & Printing	4,173	4,132	+41.73	+1.01%	6	18,854	0.3%	58.7	1.2%	NM	0.8x	DUTCHBANGL	41,744	1.2%	0.9	6.7x	0.8x
Tannery	1,996	1,992	+3.71	+0.19%	6	22,239	0.3%	31.6	0.6%	68.0x	1.5x	POWERGRID	37,375	1.0%	4.9	NM	0.2x
Jute	15,620	15,362	+257.94	+1.68%	3	3,438	0.1%	52.8	1.1%	NM	NM	BXPHARMA	36,983	1.0%	63.5	6.2x	0.7x
Ceramics	378	379	-0.54	-0.14%	5	16,963	0.3%	46.6	0.9%	NM	1.0x	PUBALIBANK	32,044	0.9%	1.5	3.3x	0.6x
Miscellaneous	4,198	4,186	+11.06	+0.26%	15	227,940	3.4%	166.8	3.4%	41.2x	1.8x	EBL	31,509	0.9%	29.4	4.8x	0.7x
Corporate Bond**	12,400	12,289	+111.57	+0.91%	16	35,170	0.5%	0.0	0.0%	NM	NM	OLYMPIC	31,031	0.9%	12.8	16.9x	2.8x
Treasury Bond**	496	489	+7.03	+1.44%	236	3,013,334	45.3%	4.1	0.1%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
CNATEX	5.5	+10.0%	31.3	NM	NM
1STPRIMFMF	47.5	+10.0%	75.4	NM	4.5x
MIRACLEIND	21.0	+9.9%	12.3	NM	1.6x
SINOBANGLA	39.9	+9.9%	41.4	27.6x	1.5x
DSSL	10.0	+9.9%	5.4	32.3x	0.5x
ASIATICLAB	33.8	+9.74%	91.1	14.4x	0.6x
BBS	11.3	+9.7%	29.4	NM	1x
MLDYING	9.1	+9.6%	10.9	47.9x	0.7x
DSHGARME	78.2	+9.5%	5.7	NM	4.2x
GHCL	23.8	+8.2%	8.7	NM	0.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SHYAMPSUG	105.6	-9.0%	15.5	NM	NM
FAREASTFIN	3.4	-8.1%	1.4	NM	NM
NEWLINE	9.0	-7.2%	20.2	17.3x	0.4x
LIBRAINFU	896.9	-6.3%	37.0	NM	1.1x
MONNOAGML	393.0	-5.5%	15.2	NM	2.9x
JUTESPINN	256.9	-5.2%	1.9	NM	NM
EMERALDOIL	33.0	-4.3%	122.7	25.5x	NM
DOREENPWR	28.0	-3.8%	18.8	18.8x	0.5x
TRUSTBANK	22.5	-3.4%	13.3	5.6x	0.8x
NAHEEACP	22.7	-3.4%	16.8	64.9x	1.2x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	8.8x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.9x	3.1x
RENATA	35,002	2.6%	23.0x	2.1x
ISLAMIBANK	33,649	2.5%	18.1x	1.2x
BXPHARMA	32,479	2.4%	6.2x	0.7x
BRACBANK	32,157	2.4%	7.7x	1.1x
GP	30,004	2.2%	12.2x	7.5x
LHB	24,690	1.8%	15.5x	3.1x
EBL	24,199	1.8%	4.8x	0.7x
PUBALIBANK	20,448	1.5%	3.3x	0.6x
NBL	16,930	1.2%	NM	2.9x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	4.8x	0.5x
ALARABANK	13,534	1.0%	12.8x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	16.9x	2.8x
UTTARABANK	11,350	0.8%	7.6x	0.7x
ORIONPHARM	11,317	0.8%	47.5x	0.4x
ROBI	10,738	0.8%	24.8x	2.1x

\* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.  
 \*\* The base of the Bond index starts at 100, starting from Jan 13, 2022  
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NRBBANK	14.1	+0.7%	305.2	23.2x	1.1x
EMERALDOIL	33.0	-4.3%	122.7	25.5x	NM
GENEXIL	34.0	+1.5%	121.5	13.6x	1.6x
TECHNODRUG	39.4	+5.6%	102.7	NM	1.3x
AGNISYSL	27.0	+1.1%	102.1	22.7x	1.6x
ASIATICLAB	33.8	+9.7%	91.1	14.4x	0.6x
FEKDIL	19.1	-	89.2	8.7x	0.9x
JAMUNAOIL	190.1	-0.7%	88.0	4.4x	0.8x
MIDLANDBNK	34.8	+1.5%	87.4	20.1x	2.4x
1STPRIMFMF	47.5	+10.0%	75.4	NM	4.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
TRUSTBANK	23.4	23.2	10.0	605	14.09
FINEFOODS	210.5	196.3	5.0	66	13.65
ACMELAB	66.5	66.5	1.0	200	13.30
EIL	53.0	53.0	1.0	200	10.60
SONALILIFE	57.8	57.8	3.0	160	9.25
AL-HAJTEX	113.0	110.0	5.0	62	6.90
MIDLANDBNK	34.0	33.0	3.0	147	4.97
QUASEMIND	24.3	24.3	1.0	145	3.52
BRACBANK	48.2	48.2	1.0	50	2.41
CITYBANK	21.9	21.8	2.0	100	2.19

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
TRUSTBANK	23.4	23.2	14.1	605	10
FINEFOODS	210.5	196.3	13.6	66	5
ACMELAB	66.5	66.5	13.3	200	1
EIL	53.0	53.0	10.6	200	1
SONALILIFE	57.8	57.8	9.2	160	3
AL-HAJTEX	113.0	110.0	6.9	62	5
MIDLANDBNK	34.0	33.0	5.0	147	3
QUASEMIND	24.3	24.3	3.5	145	1
BRACBANK	48.2	48.2	2.4	50	1
CITYBANK	21.9	21.8	2.2	100	2
JAMUNAOIL	190.0	190.0	1.9	10	1
KAY&QUE	252.3	219.6	1.6	7	2
MARICO	2,345.0	2,345.0	1.2	1	1
NHFIL	29.0	29.0	1.0	36	1
DAFODILCOM	69.0	69.0	0.8	12	1
PRAGATILIF	152.7	152.7	0.6	4	1
RUPALILIFE	106.0	106.0	0.5	5	1
RUPALILIFE	106.0	106.0	0.5	5	1
SONALIPAPR	142.1	142.1	0.5	4	1
BEXIMCO	99.1	99.1	0.5	5	1
<b>Total</b>			<b>90.0</b>		<b>43</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
EGEN		0.0%	10%	Record Date	3-Dec-24
PADMAOIL		0.0%	140%	Record Date	3-Dec-24
IBP		0.0%	0%	Record Date	3-Dec-24
RDFOOD		0.0%	2%	Record Date	4-Dec-24
TAMIJTEX		0.0%	21%	Record Date	4-Dec-24
ORIONINFU		0.0%	12%	Record Date	4-Dec-24
ORIONPHARM		0.0%	10%	Record Date	4-Dec-24
ANWARGALV		0.0%	10%	Record Date	5-Dec-24
OIMEX		0.0%	3%	Record Date	5-Dec-24
KAY&QUE		2.0%	3%	Record Date	5-Dec-24
GEMINISEA		7.5%	8%	Record Date	5-Dec-24
WMSHIPYARD		0.0%	0%	Record Date	5-Dec-24
STANCERAM		0.0%	0%	Record Date	5-Dec-24
ARAMIT		0.0%	20%	Record Date	5-Dec-24
ARAMITCEM		0.0%	0%	Record Date	5-Dec-24

**Important DSE News**
**KAY&QUE**

**(Q1 Un-audited):** EPS was Tk. 1.15 for July-September 2024 as against Tk. 0.06 for July-September 2023; NOCFPS was Tk. (0.18) for July-September 2024 as against Tk. (0.54) for July-September 2023. NAV per share was Tk. 95.33 as on September 30, 2024 and Tk. 96.17 as on June 30, 2024. Due to consolidate accounts with IT Unit (Merge with Multisourcing Ltd), profitability as well as EPS has increased.

**JAMUNAOIL**

The Board of Directors has recommended 150% cash dividend for the year ended June 30, 2024. Date of AGM: 08.02.2025, Time: 04:00 PM, Venue: Digital Platform; Record Date: 24.12.2024. The Company has also reported EPS of Tk. 40.00, NAV per share of Tk. 228.61 and NOCFPS of Tk. 22.88 for the year ended June 30, 2024 as against Tk. 30.87, Tk. 205.49 and Tk. 109.01 respectively for the year ended June 30, 2023.

**(Q1 Un-audited):** EPS was Tk. 11.24 for July-September 2024 as against Tk. 7.59 for July-September 2023; NOCFPS was Tk. 55.58 for July-September 2024 as against Tk. 40.85 for July-September 2023. NAV per share was Tk. 247.94 as on September 30, 2024 and Tk. 228.61 as on June 30, 2024. EPS increased due to increase in interest income of bank deposits during the current period comparing to previous year's same period.

**INDEXAGRO**

Refer to their earlier news disseminated by DSE on 27.10.2024 regarding dividend declaration, the company has further informed a revised recommendation for dividend: The Board unanimously recommended cash dividend @25% (Twenty five percent) to the General Public Shareholders and 15% (Fifteen percent) to the Directors and Sponsor Shareholders of the respective paid up capital of the company for the year ended 30th June 2024, instead of earlier recommendation of cash dividend @25% (Twenty five percent) to the post IPO Shareholders (General Public Shareholders) and 15% (Fifteen percent) to the Pre-IPO and Sponsor Shareholders of the respective paid up capital of the company for the year ended 30th June 2024.

**EMERALDOIL**

Referring to their earlier news disseminated by DSE on 21.11.2024 regarding closure of operational activities, the company, in response to a subsequent query dated November 27, 2024 from DSE, has informed, among others, as follows: "...we are inform you that due to insufficient gas supply in factory our production has been stopping since 1st January 2024 to till date. Though our production is stop, our factory did not close for a day..."

**MERCANBANK**

The company has informed that Mr. Md. Mati Ul Hasan has been appointed as Managing Director of the company with effect from November 30, 2024.

**ACMELAB**

Refer to BSEC's letter no. BSEC/ICAD/SRIC/80-2016/Part-3/260 dated November 27, 2024, Ms. Parveen Akhter Khanam, a sponsor of the company, has expressed her intention to sell 200,000 shares out of her total holding of 65,19,158 shares of the Company at prevailing market price (In the Public/Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

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