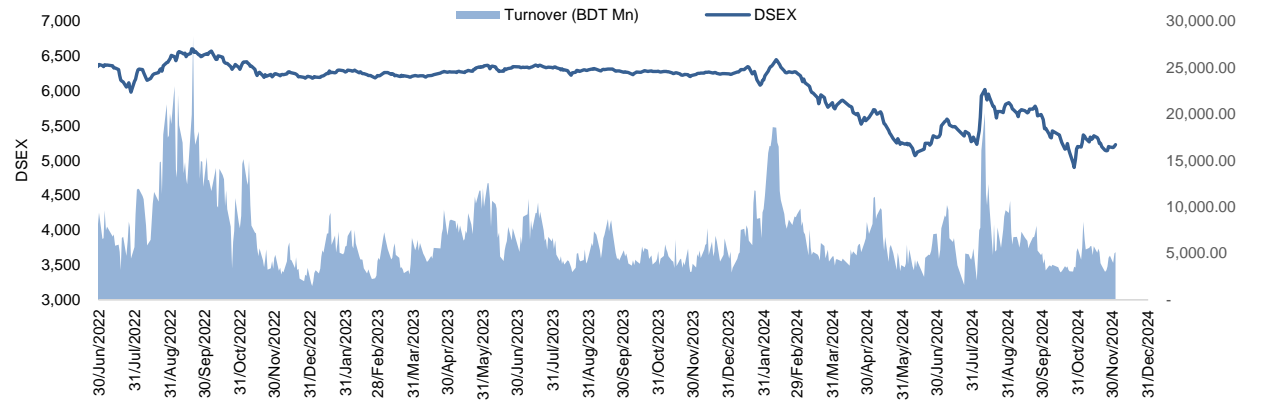


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.46%) gained 24.11 points and closed at 5,226.05. The blue-chip index DS30 (+0.40%), the Shariah-based index DSES (+0.52%), and the large-cap index CDSET (+0.56%) closed at 1,921.16, 1,174.54, and 1,058.46 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 2.44% followed by Telecommunication (+1.82%), Fuel & Power (+0.53%), Pharmaceutical (+0.42%), Engineering (+0.23%), Food & Allied (+0.13%), and Bank (-0.12%), respectively. Block trades contributed 2.8% of the overall market turnover. Asiatic Laboratories Limited (+1.2%) was the most traded share with a turnover of BDT 168 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,226.05	5,201.94	+24.11	+0.46%	-16.3%
DS30	1,921.16	1,913.51	+7.65	+0.40%	-8.2%
DSES	1,174.54	1,168.43	+6.11	+0.52%	-13.9%
CDSET	1,058.46	1,052.58	+5.88	+0.56%	-12.0%

	Advanced	Declined	Unchanged	Total
All Category	203	128	71	402
A Category (Equity)	117	79	39	235
B Category (Equity)	50	21	10	81
N Category (Equity)	2	2	0	4
Z Category (Equity)	34	26	22	82
Mutual Funds	10	8	19	37
Corporate Bonds	0	2	0	2
Treasury Bonds	4	6	0	10

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,672,144	6,650,029	+0.3%
Mn USD	55,601	55,417	
Turnover			
Mn BDT	5,125	5,002	+2.4%
Mn USD	43	42	
Volume			
Mn Shares	221	212	+3.9%
No. of Trade	160,981	164,449	-2.1%

* Average Interbank Exchange Rate is BDT 120.00 as of Dec 03, 2024

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Figure: Sectorial Turnover (BDT Mn)

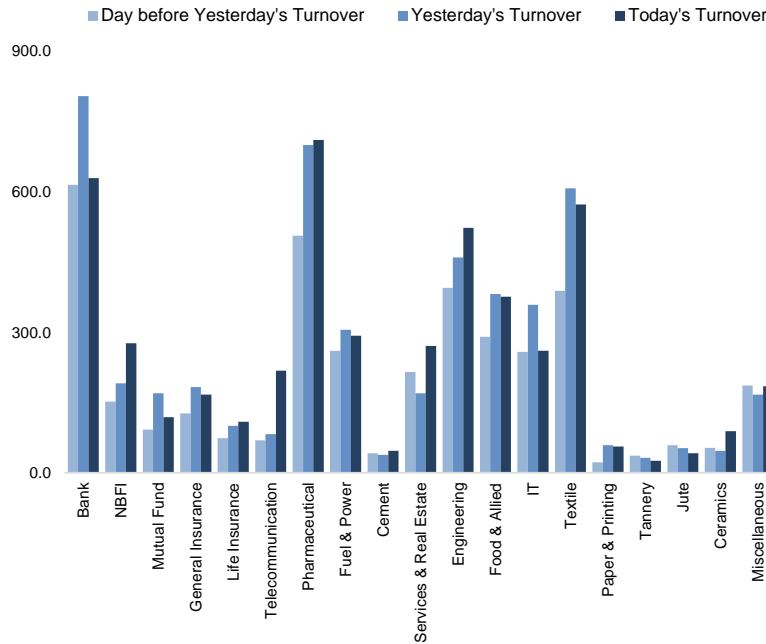
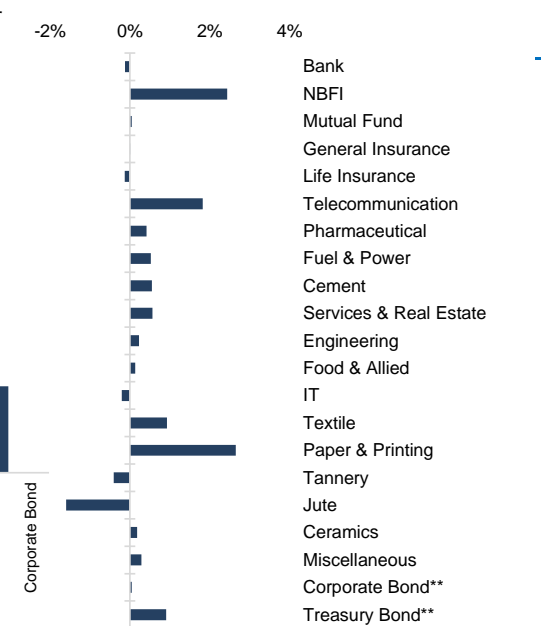


Figure: Sectorial Mcap Change



Market PE 14.9x
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	1,450	1,452	-1.81	-0.12%	36	686,040	10.3%	629.4	12.6%	8.9x	0.7x	GP	437,227	12.0%	116.2	12.3x	7.6x
NBFI	1,358	1,326	+32.30	+2.44%	23	129,428	1.9%	276.7	5.6%	NM	NM	BATBC	190,404	5.2%	20.9	10.9x	3.1x
Mutual Fund	613	613	+0.30	+0.05%	37	28,190	0.4%	118.4	2.4%	NM	0.5x	SQURPHARMA	187,218	5.1%	24.5	8.9x	1.4x
General Insurance	2,833	2,833	+0.27	+0.01%	43	80,879	1.2%	167.0	3.4%	14.6x	1.2x	WALTONHIL	146,951	4.0%	4.5	11.3x	1.3x
Life Insurance	1,921	1,923	-2.45	-0.13%	15	51,087	0.8%	108.7	2.2%	NM	NM	ROBI	140,900	3.9%	95.9	25.6x	2.2x
Telecommunication	5,116	5,024	+91.58	+1.82%	3	599,843	9.0%	218.0	4.4%	14.2x	4.3x	BEXIMCO	103,847	2.9%	0.1	NM	1.3x
Pharmaceutical	2,922	2,910	+12.20	+0.42%	34	553,895	8.3%	710.8	14.3%	14.1x	1.5x	BRACBANK	84,769	2.3%	85.2	7.7x	1.1x
Fuel & Power	1,158	1,152	+6.07	+0.53%	23	306,494	4.6%	292.8	5.9%	14.6x	0.6x	ISLAMIBANK	83,881	2.3%	35.0	18.0x	1.1x
Cement	2,013	2,002	+11.08	+0.55%	7	95,945	1.4%	46.6	0.9%	16.1x	2.0x	BERGERPBL	82,302	2.3%	0.5	24.7x	5.2x
Services & Real Estate	1,086	1,080	+6.11	+0.57%	9	59,714	0.9%	270.8	5.4%	19.9x	0.4x	UPGDCL	75,418	2.1%	4.7	7.2x	2.0x
Engineering	2,539	2,533	+5.77	+0.23%	42	286,393	4.3%	522.8	10.5%	12.5x	0.9x	MARICO	72,815	2.0%	2.4	13.7x	9.6x
Food & Allied	16,897	16,874	+22.46	+0.13%	21	309,161	4.6%	376.1	7.5%	16.6x	4.4x	ICB	64,958	1.8%	128.3	33.4x	1.5x
IT	2,119	2,124	-4.32	-0.20%	11	27,953	0.4%	260.6	5.2%	20.6x	1.8x	LHB	63,295	1.7%	6.6	15.7x	3.1x
Textile	1,117	1,107	+10.25	+0.93%	58	115,988	1.7%	572.8	11.5%	73.2x	0.8x	UNILEVERCL	50,971	1.4%	0.3	69.4x	21.7x
Paper & Printing	4,284	4,173	+110.74	+2.65%	6	19,355	0.3%	55.7	1.1%	NM	0.9x	DUTCHBANGL	41,920	1.2%	1.0	6.7x	0.9x
Tannery	1,988	1,996	-8.08	-0.40%	6	22,149	0.3%	25.3	0.5%	67.8x	1.5x	POWERGRID	37,649	1.0%	4.5	NM	0.2x
Jute	15,370	15,620	-249.87	-1.60%	3	3,383	0.1%	41.4	0.8%	NM	NM	BXPHARMA	36,849	1.0%	53.2	6.1x	0.7x
Ceramics	379	378	+0.67	+0.18%	5	16,993	0.3%	88.8	1.8%	NM	1.0x	PUBALIBANK	32,160	0.9%	2.3	3.4x	0.6x
Miscellaneous	4,210	4,198	+12.11	+0.29%	15	228,598	3.4%	184.5	3.7%	41.3x	1.8x	EBL	31,780	0.9%	13.3	4.9x	0.7x
Corporate Bond**	12,406	12,400	+6.03	+0.05%	16	34,870	0.5%	0.1	0.0%	NM	NM	OLYMPIC	31,290	0.9%	7.9	17.0x	2.8x
Treasury Bond**	501	496	+4.51	+0.91%	236	3,014,939	45.2%	14.4	0.3%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DULAMIACOT	81.4	+10.0%	3.6	NM	NM
DSSL	11.0	+10.0%	111.1	35.5x	0.6x
SALAMCRST	12.2	+9.9%	4.0	76.3x	0.7x
DESHBANDHU	20.2	+9.8%	27.1	NM	1.1x
SAIFPOWER	14.0	+9.4%	75.4	20.0x	0.8x
FUWANGFOOD	14.4	+9.09%	72.1	NM	7.1x
BPML	31.3	+7.2%	6.7	NM	0x
INTRACO	22.2	+6.7%	83.5	26.7x	1.8x
MLDYEING	9.7	+6.6%	11.1	51.1x	0.7x
TOSRIFA	19.9	+5.9%	10.1	42.3x	0.6x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EMERALDOIL	29.7	-10.0%	1.4	22.9x	NM
DAFODILCOM	64.0	-6.6%	5.5	NM	5x
BIFC	9.6	-5.0%	0.4	NM	NM
PRIMEFIN	4.4	-4.3%	1.1	NM	0.5x
NRBBANK	13.6	-3.5%	158.4	22.4x	1.1x
UTTARAFIN	16.6	-3.5%	0.1	NM	0.3x
PRIMETEX	12.3	-3.1%	0.8	NM	0.2x
STANCERAM	70.7	-3.0%	0.2	NM	NM
1JANATAMF	3.3	-2.9%	0.3	NM	0.4x
EBLNRBMF	3.4	-2.9%	0.9	NM	0.4x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	8.9x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.9x	3.1x
RENATA	35,002	2.6%	23.1x	2.1x
ISLAMIBANK	33,649	2.5%	18.0x	1.1x
BXPHARMA	32,479	2.4%	6.1x	0.7x
BRACBANK	32,157	2.4%	7.7x	1.1x
GP	30,004	2.2%	12.3x	7.6x
LHB	24,690	1.8%	15.7x	3.1x
EBL	24,199	1.8%	4.9x	0.7x
PUBALIBANK	20,448	1.5%	3.4x	0.6x
NBL	16,930	1.2%	NM	3.1x
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%	17.0x	2.8x
UTTARABANK	11,350	0.8%	7.7x	0.7x
ORIONPHARM	11,317	0.8%	47.4x	0.4x
ROBI	10,738	0.8%	25.6x	2.2x

* 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
ASIATICLAB	34.2	+1.2%	167.6	14.5x	0.6x
NRBBANK	13.6	-3.5%	158.4	22.4x	1.1x
ICB	74.9	+4.0%	128.3	33.4x	1.5x
FINEFOODS	227.2	+4.5%	117.5	NM	19.0x
GP	323.8	+1.4%	116.2	12.3x	7.6x
DSSL	11.0	+10.0%	111.1	35.5x	0.6x
GENEXIL	33.6	-1.2%	100.0	13.5x	1.6x
ROBI	26.9	+3.5%	95.9	25.6x	2.2x
GOLDENSON	15.7	+4.0%	88.0	NM	0.9x
BRACBANK	47.9	-0.8%	85.2	7.7x	1.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MARICO	2,312.1	2,312.1	1.0	15	34.68
EIL	54.0	53.8	4.0	598	32.23
ALARABANK	19.6	19.6	1.0	1,100	21.56
STANDBANKL	6.0	6.0	3.0	1,361	8.17
DOMINAGE	13.3	13.3	4.0	500	6.65
FINEFOODS	235.0	198.5	3.0	29	6.13
DSSL	11.0	11.0	1.0	500	5.50
NTC	202.0	202.0	1.0	21	4.24
RELIANCE1	19.3	19.0	3.0	197	3.78
QUASEMIND	25.4	25.4	1.0	127	3.23

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MARICO	2,312.1	2,312.1	34.7	15	1
EIL	54.0	53.8	32.2	598	4
ALARABANK	19.6	19.6	21.6	1,100	1
STANDBANKL	6.0	6.0	8.2	1,361	3
DOMINAGE	13.3	13.3	6.7	500	4
FINEFOODS	235.0	198.5	6.1	29	3
DSSL	11.0	11.0	5.5	500	1
NTC	202.0	202.0	4.2	21	1
RELIANCE1	19.3	19.0	3.8	197	3
QUASEMIND	25.4	25.4	3.2	127	1
NRBBANK	14.3	13.8	3.2	231	2
JAMUNAOIL	188.0	188.0	1.9	10	2
NHFIL	30.4	30.4	1.7	55	1
MONOSPOOL	130.0	130.0	1.4	11	2
DESCO	19.0	19.0	1.3	68	1
BSC	92.5	92.5	1.3	14	2
SUNLIFEINS	55.6	55.6	0.9	16	1
SUNLIFEINS	55.6	55.6	0.9	16	1
CONFIDCEM	66.9	66.9	0.7	10	1
SIBL	9.8	9.8	0.6	60	1
PREMIERCEM	57.2	57.2	0.6	10	1
LANKABAFIN	21.0	21.0	0.6	27	1
Total			143.2		42

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
SSSTEEL		0.0%	0%	Record Date	5-Dec-24
ACMEPL		0.0%	0%	Record Date	5-Dec-24
SILCOPHL		0.0%	1%	Record Date	8-Dec-24

Important DSE News
GOLDENSON

(Q1 Un-audited): Consolidated EPS was Tk. (0.07) for July-September 2024 as against Tk. (0.11) for July-September 2023; Consolidated NOCFPS was Tk. 0.69 for July-September 2024 as against Tk. (0.36) for July-September 2023. Consolidated NAV per share was Tk. 17.92 as on September 30, 2024 and Tk. 17.99 as on June 30, 2024.

DULAMIACOT

(Q1 Un-audited): EPS was Tk. 0.21 for July-September 2024 as against Tk. (0.26) for July-September 2023; NOCFPS was Tk. 0.36 for July-September 2024 as against Tk. (0.13) for July-September 2023. NAV per share was Tk. (39.87) as on September 30, 2024 and Tk. (39.46) as on June 30, 2024.

BDTHAIFOOD

(Q1 Un-audited): EPS was Tk. 0.03 for July-September 2024 as against Tk. 0.15 for July-September 2023; NOCFPS was Tk. (0.36) for July-September 2024 as against Tk. 0.81 for July-September 2023. NAV per share was Tk. 14.12 as on September 30, 2024 and Tk. 14.09 as on June 30, 2024.

AAMRANET

The company has informed that the Board of Directors has decided to sell the company's 98.30 decimal land located at Plot 40, East Nasirabad I/A, Panchlaih, Chattogram, at a value of BDT 22.00 crore. The aforementioned decision will be put forth for shareholders' approval at the company's upcoming AGM.

DAFODILCOM

The company has informed that the Board of Directors of Daffodil Computers Limited approved the issuance of 4,67,00,000 fresh shares of Tk. 10/- each for the purpose of converting the loan from "Daffodil Family Concern" into equity shares of the company, subject to approval of Bangladesh Securities and Exchange Commission (BSEC).

PARAMOUNT

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Paramount Insurance PLC.' instead of 'Paramount Insurance Limited' with effect from today i.e., December 03, 2024. Other things (except name) will remain unchanged.

PRAGATILIF

The company has informed that the Board of Directors has unanimously elected Mr. Khalilur Rahman as the Chairman of Pragati Life Insurance PLC with effect from October 29, 2024.

NCCBANK

The company has informed that Alhaj Md. Nurun Newaz (Sponsor Director) has been elected as Chairman of the Board of Directors for 02 (two years).

CONFIDCEM

The Company will be placed in 'Z' category from existing 'A' category with effect from December 04, 2024 as per provision 1(e) of BSEC Directive No. BSEC/CMRRCD/2009-193/77, dated May 20, 2024 regarding non-disbursement of the approved dividend within the stipulated time frame.

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