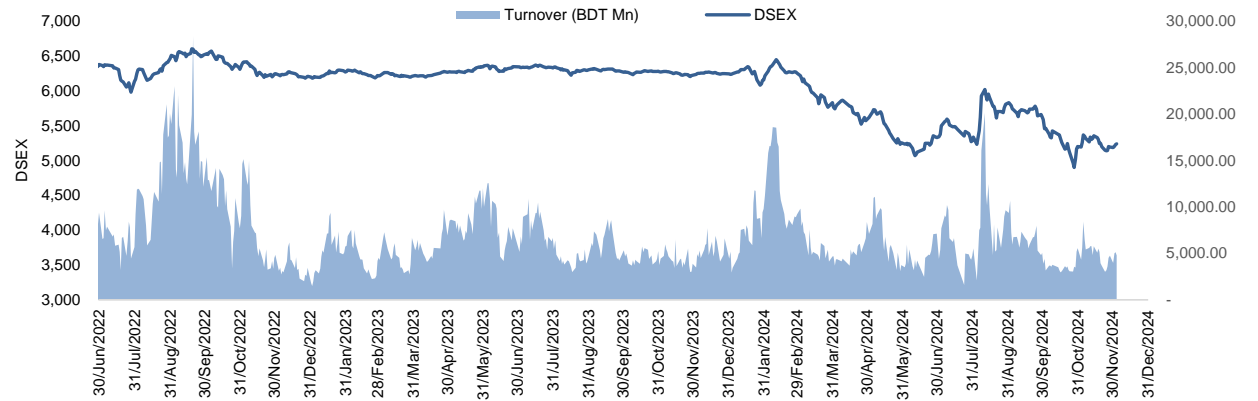


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.24%) gained 12.32 points and closed at 5,238.37. The blue-chip index DS30 (+0.35%), the Shariah-based index DSES (-0.20%), and the large-cap index CDSET (+0.67%) closed at 1,927.88, 1,172.25, and 1,065.57 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.84%, followed by Food & Allied (+0.50%), Bank (+0.32%), Engineering (-0.55%), Fuel & Power (-0.57%), Telecommunication (-0.73%), and NBF1 (-2.03%), respectively. Block trades contributed 7.5% of the overall market turnover. NRB Bank Limited (-2.2%) was the most traded share with a turnover of BDT 143 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,238.37	5,226.05	+12.32	+0.24%	-16.1%
DS30	1,927.88	1,921.16	+6.72	+0.35%	-7.9%
DSES	1,172.25	1,174.54	-2.29	-0.20%	-14.1%
CDSET	1,065.57	1,058.46	+7.11	+0.67%	-11.4%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	139	206	49	394
<b>A Category (Equity)</b>	102	104	20	226
<b>B Category (Equity)</b>	16	55	9	80
<b>N Category (Equity)</b>	0	3	1	4
<b>Z Category (Equity)</b>	21	44	19	84
<b>Mutual Funds</b>	36	1	0	37
<b>Corporate Bonds</b>	2	0	0	2
<b>Treasury Bonds</b>	2	0	0	2

	Today	Last Day	Daily %Δ
<b>Mcap</b>	Mn BDT 6,668,257	6,672,144	-0.1%
	Mn USD 55,569	55,601	
<b>Turnover</b>	Mn BDT 4,765	5,125	-7.0%
	Mn USD 40	43	
<b>Volume</b>	Mn Shares 218	221	-1.1%
<b>No. of Trade</b>	152,114	160,981	-5.5%

\* Average Interbank Exchange Rate is BDT 120.00 as of Dec 04, 2024

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Figure: Sectorial Turnover (BDT Mn)

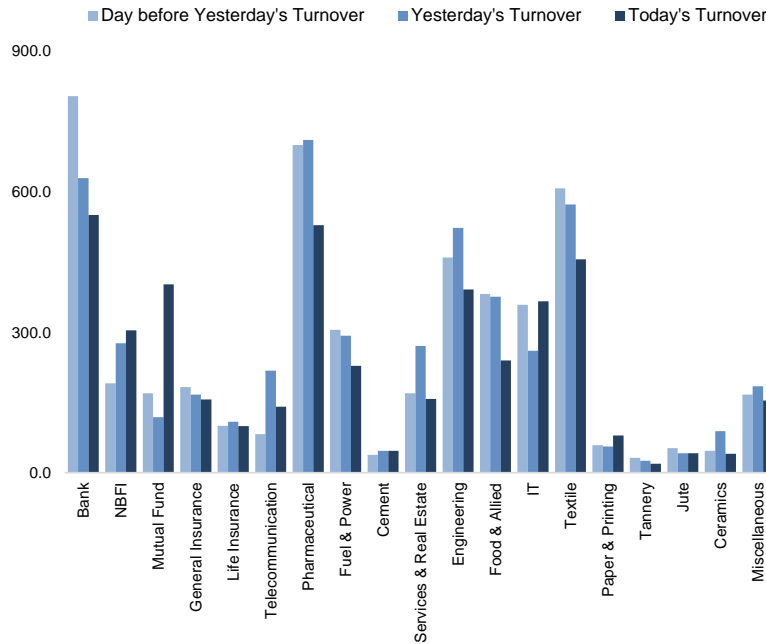
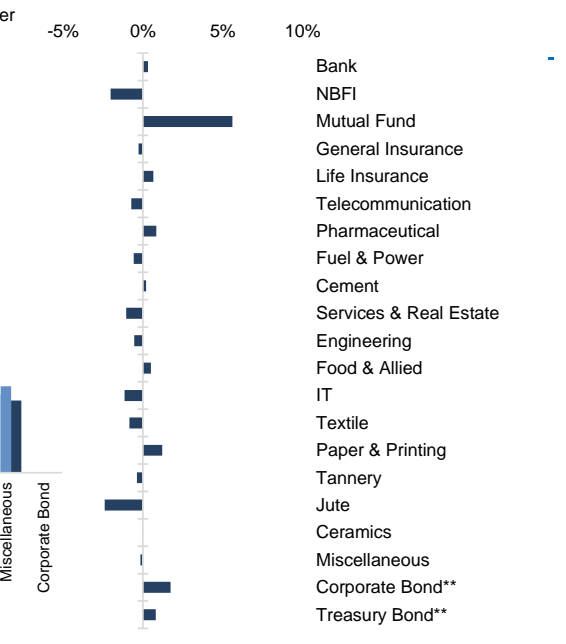


Figure: Sectorial Mcap Change



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	1,455	1,450	+4.71	+0.32%	36	688,269	10.3%	550.6	12.5%	8.9x	0.7x	GP	432,771	11.9%	71.2	12.2x	7.5x
NBFI	1,331	1,358	-27.53	-2.03%	23	126,805	1.9%	304.1	6.9%	NM	NM	BATBC	191,808	5.3%	38.2	10.9x	3.1x
Mutual Fund	648	613	+34.36	+5.60%	37	29,769	0.4%	402.3	9.1%	NM	0.6x	SQRPHARMA	191,385	5.3%	85.8	9.1x	1.4x
General Insurance	2,825	2,833	-7.75	-0.27%	43	80,658	1.2%	156.3	3.5%	14.6x	1.2x	WALTONHIL	147,132	4.0%	3.4	11.3x	1.3x
Life Insurance	1,933	1,921	+12.54	+0.65%	15	51,421	0.8%	99.5	2.3%	NM	NM	ROBI	140,900	3.9%	62.7	25.6x	2.2x
Telecommunication	5,078	5,116	-37.20	-0.73%	3	595,480	8.9%	141.1	3.2%	14.1x	4.2x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,946	2,922	+24.56	+0.84%	34	558,551	8.4%	528.9	12.0%	14.2x	1.5x	BRACBANK	85,123	2.3%	69.2	7.7x	1.1x
Fuel & Power	1,151	1,158	-6.63	-0.57%	23	304,739	4.6%	228.5	5.2%	14.5x	0.6x	ISLAMIBANK	83,881	2.3%	41.2	18.0x	1.1x
Cement	2,017	2,013	+4.09	+0.20%	7	96,140	1.4%	46.7	1.1%	16.2x	2.1x	BERGERPBL	82,163	2.3%	0.4	24.7x	5.2x
Services & Real Estate	1,074	1,086	-11.34	-1.04%	9	59,090	0.9%	157.9	3.6%	19.7x	0.4x	UPGDCL	75,186	2.1%	1.4	7.2x	2.0x
Engineering	2,525	2,539	-13.88	-0.55%	42	284,828	4.3%	391.7	8.9%	12.5x	0.9x	MARICO	73,137	2.0%	0.6	13.8x	9.6x
Food & Allied	16,981	16,897	+84.12	+0.50%	21	310,701	4.7%	239.5	5.4%	16.6x	4.4x	LHB	63,759	1.8%	12.0	15.8x	3.1x
IT	2,095	2,119	-24.30	-1.15%	11	27,632	0.4%	366.2	8.3%	20.3x	1.8x	ICB	62,009	1.7%	83.7	31.9x	1.4x
Textile	1,108	1,117	-9.38	-0.84%	58	115,014	1.7%	455.8	10.3%	72.6x	0.8x	UNILEVERCL	50,655	1.4%	0.3	68.9x	21.6x
Paper & Printing	4,336	4,284	+52.24	+1.22%	6	19,591	0.3%	79.6	1.8%	NM	0.9x	DUTCHBANGL	42,535	1.2%	2.5	6.8x	0.9x
Tannery	1,981	1,988	-7.40	-0.37%	6	22,067	0.3%	19.5	0.4%	67.5x	1.5x	POWERGRID	37,466	1.0%	3.5	NM	0.2x
Jute	15,002	15,370	-368.06	-2.39%	3	3,302	0.0%	41.9	0.9%	NM	NM	BXPHARMA	37,117	1.0%	48.4	6.2x	0.7x
Ceramics	379	379	-0.06	-0.02%	5	16,990	0.3%	40.3	0.9%	NM	1.0x	PUBALIBANK	32,391	0.9%	20.0	3.4x	0.6x
Miscellaneous	4,203	4,210	-6.45	-0.15%	15	228,248	3.4%	154.2	3.5%	41.3x	1.8x	OLYMPIC	32,210	0.9%	22.5	17.5x	2.9x
Corporate Bond**	12,621	12,406	+214.50	+1.73%	16	35,151	0.5%	1.1	0.0%	NM	NM	EBL	31,780	0.9%	10.2	4.9x	0.7x
Treasury Bond**	505	501	+4.07	+0.81%	236	3,012,968	45.2%	0.6	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ICBSONALI1	6.9	+9.5%	45.7	NM	1.0x
1JANATAMF	3.6	+9.1%	4.7	NM	0.4x
GLDNJMF	9.8	+8.9%	57.9	NM	1.0x
LRGLOBMF1	3.7	+8.8%	1.3	NM	0.4x
EBLNRBMF	3.7	+8.8%	2.9	NM	0.4x
ICBAGRANI1	7.5	+8.70%	4.7	NM	1.0x
CAPMBDBLMF	6.4	+8.5%	1.6	NM	1x
SEMLLECMF	6.5	+8.3%	17.6	NM	0.7x
EBL1STMF	3.9	+8.3%	1.3	NM	0.4x
GRAMEENS2	14.2	+7.6%	53.5	NM	0.9x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EMERALDOIL	26.8	-9.8%	4.8	20.7x	NM
JUTESPINN	239.4	-6.9%	2.3	NM	NM
HRTEX	28.9	-6.5%	5.0	NM	0.8x
PADMAOIL	197.6	-6.4%	10.4	4.4x	0.8x
DESHBANDHU	19.0	-5.9%	15.0	NM	1.1x
BBS	10.8	-5.3%	16.0	NM	0.9x
CNATEX	5.4	-5.3%	25.4	NM	NM
CONFIDCEM	59.2	-5.1%	26.6	5.6x	0.8x
HFL	9.6	-5.0%	3.0	NM	0.3x
MIRACLEIND	20.6	-4.6%	4.2	NM	1.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQRPHARMA	117,112	8.6%	9.1x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.9x	3.1x
RENATA	35,002	2.6%	23.3x	2.2x
ISLAMIBANK	33,649	2.5%	18.0x	1.1x
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%	15.8x	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	3.2x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	4.7x	0.5x
ALARABANK	13,534	1.0%	12.9x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	17.5x	2.9x
UTTARABANK	11,350	0.8%	7.6x	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
NRBBANK	13.3	-2.2%	143.1	21.9x	1.0x
EGEN	26.5	-0.7%	94.5	22.3x	1.1x
GENEXIL	32.8	-2.4%	92.0	13.2x	1.5x
SQRPHARMA	215.9	+2.2%	85.8	9.1x	1.4x
ASIATICLAB	34.1	-0.3%	85.7	14.5x	0.6x
BSC	90.0	-1.0%	85.4	4.7x	0.8x
ICB	71.5	-4.5%	83.7	31.9x	1.4x
DSSL	11.0	-	72.1	35.5x	0.6x
AGNISYSL	26.9	-	71.8	22.6x	1.6x
GP	320.5	-1.0%	71.2	12.2x	7.5x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ACMELAB	67.2	67.0	10.0	2,000	134.01
MTB	12.1	12.1	2.0	5,000	60.50
MARICO	2,312.1	2,312.1	1.0	25	57.80
DOMINAGE	13.0	13.0	10.0	1,795	23.34
RELIANCE1	22.1	19.0	8.0	760	14.71
AL-HAJTEX	120.0	110.5	3.0	111	12.41
FINEFOODS	222.0	210.6	3.0	55	11.99
DSSL	11.1	11.1	1.0	500	5.55
MJLBD	95.2	95.2	4.0	42	4.00
DUTCHBANGL	43.0	43.0	1.0	92	3.96

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ACMELAB	67.2	67.0	134.0	2,000	10
MTB	12.1	12.1	60.5	5,000	2
MARICO	2,312.1	2,312.1	57.8	25	1
DOMINAGE	13.0	13.0	23.3	1,795	10
RELIANCE1	22.1	19.0	14.7	760	8
AL-HAJTEX	120.0	110.5	12.4	111	3
FINEFOODS	222.0	210.6	12.0	55	3
DSSL	11.1	11.1	5.6	500	1
MJLBD	95.2	95.2	4.0	42	4
DUTCHBANGL	43.0	43.0	4.0	92	1
UNIONCAP	6.0	6.0	3.6	600	1
EMERALDOIL	26.8	26.8	3.2	120	2
MIDLANDBNK	35.2	35.2	2.7	76	2
SAPORTL	24.8	24.8	2.0	80	2
EIL	52.2	52.2	1.9	36	1
LOVELLO	91.0	91.0	1.8	20	1
DULAMIACOT	88.0	88.0	1.4	16	1
DULAMIACOT	88.0	88.0	1.4	16	1
NRBBANK	14.7	13.9	1.4	96	2
ACI	141.0	141.0	1.2	9	1
ISNLTD	36.0	36.0	1.2	33	1
NLTUBES	77.5	77.5	1.1	14	1
<b>Total</b>			<b>359.0</b>		<b>71</b>

**Important DSE News**
**JUTESPINN**

The Board of Directors has recommended No dividend for the year ended June 30, 2024. Record Date: 22.12.2024. Date and Venue of the 45th AGM will be notified later on after receipt of permission from the High Court for 38th, 39th, 40th, 41st, 42nd, 43rd and 44th AGM. The Company has also reported EPS of Tk. (64.45), NAV per share of Tk. (587.87) and NOCFPS of Tk. (22.28) for the year ended June 30, 2024 as against Tk. (83.78), Tk. (522.19) and Tk. (68.73) respectively for the year ended June 30, 2023.

**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 20,00,000 shares out of her total holding of 65,19,158 shares of the Company at prevailing market price (In the Public and/or Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

**NAHEEACP**

Dhaka Stock Exchange PLC. (DSE) has approved the proposed name change of the Company. Accordingly, the name of the Company will be 'Nahee Aluminum Composite Panel PLC.' instead of 'Nahee Aluminum Composite Panel Ltd' with effect from December 05, 2024. Other things (except name) will remain unchanged.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
EASTRNLUB		10.0%	80%	Record Date	9-Dec-24
SONALIANS		0.0%	10%	Record Date	9-Dec-24
PREMIERLEA		0.0%	0%	Record Date	9-Dec-24
BDSERVICE		0.0%	0%	Record Date	9-Dec-24

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