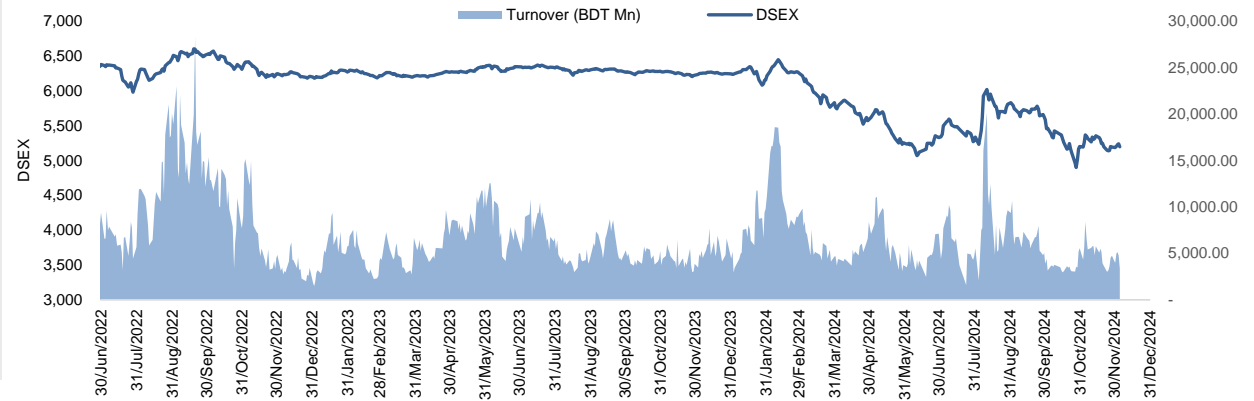


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.79%) lost 41.55 points and closed at 5,196.82. The blue-chip index DS30 (-0.83%), the Shariah-based index DSES (-0.71%), and the large-cap index CDSET (-0.74%) closed at 1,911.92, 1,163.97, and 1,057.69 points, respectively. All the large-cap sectors posted negative performance today. Fuel & Power experienced the highest loss of 1.37% followed by NBF1 (-1.19%), Telecommunication (-1.10%), Food & Allied (-0.90%), Engineering (-0.75%), Bank (-0.64%), and Pharmaceutical (-0.59%), respectively. Block trades contributed 6.9% of the overall market turnover. Orion Infusion Ltd. (+4.0%) was the most traded share with a turnover of BDT 143 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,196.82	5,238.37	-41.55	-0.79%	-16.8%
DS30	1,911.92	1,927.88	-15.96	-0.83%	-8.7%
DSES	1,163.97	1,172.25	-8.28	-0.71%	-14.7%
CDSET	1,057.69	1,065.57	-7.88	-0.74%	-12.1%

	Advanced	Declined	Unchanged	Total
All Category	42	308	38	388
A Category (Equity)	23	187	16	226
B Category (Equity)	10	55	11	76
N Category (Equity)	0	4	0	4
Z Category (Equity)	9	62	11	82
Mutual Funds	2	32	2	36
Corporate Bonds	0	1	1	2
Treasury Bonds	0	4	0	4

	Today	Last Day	Daily %Δ
Mcap	Mn BDT 6,637,050	6,668,257	-0.5%
	Mn USD 55,309	55,569	
Turnover	Mn BDT 3,352	4,765	-29.7%
	Mn USD 28	40	
Volume	Mn Shares 141	218	-35.4%
No. of Trade	121,527	152,114	-20.1%

* Average Interbank Exchange Rate is BDT 120.00 as of Dec 05, 2024

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Figure: Sectorial Turnover (BDT Mn)

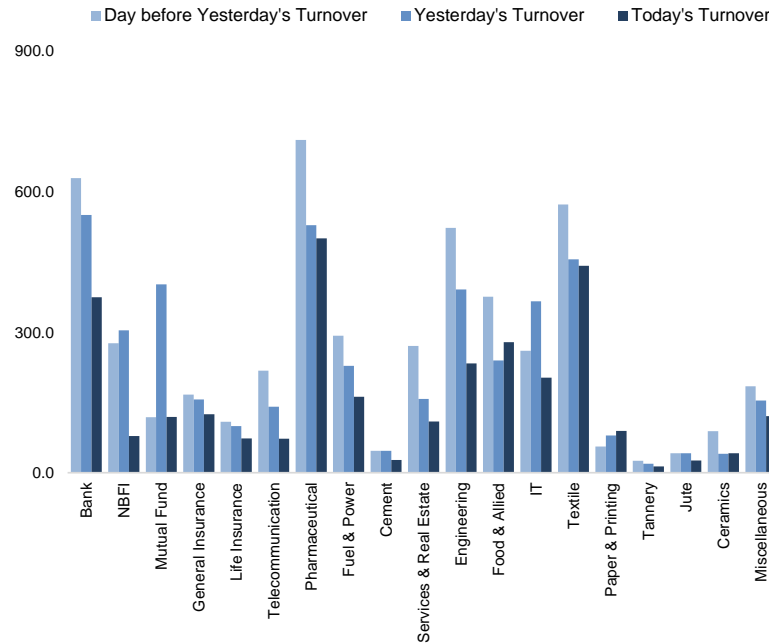
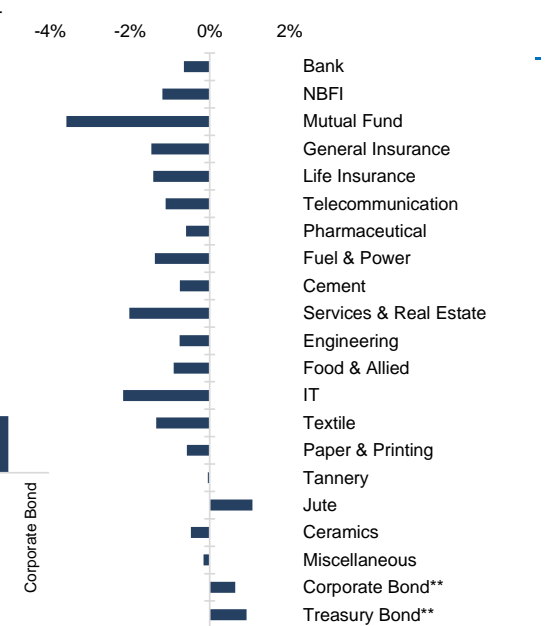


Figure: Sectorial Mcap Change



Market PE 14.7x
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	1,445	1,455	-9.36	-0.64%	36	683,840	10.3%	374.6	12.0%	8.8x	0.7x	GP	428,855	11.9%	34.8	12.1x	7.4x
NBFI	1,315	1,331	-15.78	-1.19%	23	125,301	1.9%	78.1	2.5%	NM	NM	BATBC	190,296	5.3%	18.7	10.8x	3.1x
Mutual Fund	624	648	-23.25	-3.59%	37	28,701	0.4%	119.1	3.8%	NM	0.6x	SQURPHARMA	189,701	5.3%	29.3	9.0x	1.4x
General Insurance	2,784	2,825	-41.28	-1.46%	43	79,480	1.2%	125.1	4.0%	14.4x	1.2x	WALTONHIL	146,587	4.1%	3.7	11.2x	1.3x
Life Insurance	1,906	1,933	-27.37	-1.42%	15	50,693	0.8%	73.1	2.3%	NM	NM	ROBI	138,281	3.8%	33.6	25.1x	2.1x
Telecommunication	5,022	5,078	-56.05	-1.10%	3	588,908	8.9%	72.8	2.3%	13.9x	4.2x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,929	2,946	-17.44	-0.59%	34	555,245	8.4%	500.5	16.0%	14.1x	1.5x	BRACBANK	84,769	2.4%	61.6	7.7x	1.1x
Fuel & Power	1,135	1,151	-15.79	-1.37%	23	300,560	4.5%	162.0	5.2%	14.3x	0.6x	ISLAMIBANK	82,915	2.3%	26.5	17.8x	1.1x
Cement	2,002	2,017	-15.09	-0.75%	7	95,421	1.4%	27.0	0.9%	16.0x	2.0x	BERGERPBL	82,209	2.3%	0.1	24.7x	5.2x
Services & Real Estate	1,053	1,074	-21.64	-2.01%	9	57,899	0.9%	109.6	3.5%	19.3x	0.4x	RENATA	74,679	2.1%	2.5	23.4x	2.2x
Engineering	2,506	2,525	-19.02	-0.75%	42	282,682	4.3%	233.2	7.5%	12.4x	0.9x	MARICO	72,702	2.0%	1.2	13.7x	9.5x
Food & Allied	16,828	16,981	-152.82	-0.90%	21	307,904	4.6%	278.9	8.9%	16.5x	4.3x	LHB	62,946	1.7%	7.8	15.6x	3.1x
IT	2,050	2,095	-45.46	-2.17%	11	27,033	0.4%	203.2	6.5%	19.9x	1.7x	ICB	62,009	1.7%	0.0	31.9x	1.4x
Textile	1,093	1,108	-14.86	-1.34%	58	113,472	1.7%	442.2	14.2%	71.6x	0.7x	UNILEVERCL	50,206	1.4%	0.1	68.3x	21.4x
Paper & Printing	4,312	4,336	-24.78	-0.57%	6	19,479	0.3%	89.2	2.9%	NM	0.9x	DUTCHBANGL	42,535	1.2%	1.2	6.8x	0.9x
Tannery	1,980	1,981	-0.92	-0.05%	6	22,056	0.3%	13.4	0.4%	67.5x	1.5x	POWERGRID	36,644	1.0%	2.7	NM	0.2x
Jute	15,162	15,002	+160.46	+1.07%	3	3,338	0.1%	26.0	0.8%	NM	NM	BXPHARMA	36,626	1.0%	40.5	6.1x	0.7x
Ceramics	377	379	-1.80	-0.47%	5	16,910	0.3%	41.8	1.3%	NM	1.0x	PUBALIBANK	32,391	0.9%	2.7	3.4x	0.6x
Miscellaneous	4,197	4,203	-6.39	-0.15%	15	227,901	3.4%	120.7	3.9%	41.2x	1.8x	OLYMPIC	31,810	0.9%	8.4	17.3x	2.8x
Corporate Bond**	12,701	12,621	+80.41	+0.64%	16	35,057	0.5%	0.3	0.0%	NM	NM	EBL	31,373	0.9%	5.4	4.8x	0.7x
Treasury Bond**	510	505	+4.65	+0.92%	236	3,014,318	45.4%	31.3	1.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MIRACLEIND	22.6	+9.7%	10.7	NM	1.8x
STYLECRAFT	53.6	+8.7%	11.7	NM	9.4x
JUTESPINN	256.6	+7.2%	0.6	NM	NM
MONNOCERA	70.8	+6.5%	16.9	NM	0.9x
DSSL	11.5	+4.5%	119.3	37.1x	0.6x
ORIONINFU	315.0	+3.99%	142.6	NM	19.7x
FAMILYTEX	2.8	+3.7%	0.4	NM	0x
DOMINAGE	12.9	+3.2%	30.0	NM	0.7x
EBL1STMF	4.0	+2.6%	1.7	NM	0.4x
HRTEX	29.6	+2.4%	3.8	NM	0.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
NEWLINE	8.2	-8.9%	51.8	15.8x	0.3x
1STPRIMFMF	44.5	-6.9%	36.4	NM	4x
POPULAR1MF	3.2	-5.9%	1.2	NM	0.3x
GRAMEENS2	13.4	-5.6%	7.4	NM	0.9x
IFIC1STMF	3.4	-5.6%	1.3	NM	0.4x
FBFIF	3.4	-5.6%	1.8	NM	0.4x
ABB1STMF	3.4	-5.6%	2.2	NM	0.4x
LRGLOBMF1	3.5	-5.4%	1.0	NM	0.4x
GREENDELMF	3.5	-5.4%	0.8	NM	0.4x
FIRSTFIN	3.5	-5.4%	0.6	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.0x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.8x	3.1x
RENATA	35,002	2.6%	23.4x	2.2x
ISLAMIBANK	33,649	2.5%	17.8x	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%	12.1x	7.4x
LHB	24,690	1.8%	15.6x	3.1x
EBL	24,199	1.8%	4.8x	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%	4.7x	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%	17.3x	2.8x
UTTARABANK	11,350	0.8%	7.6x	0.7x
ORIONPHARM	11,317	0.8%	46.1x	0.4x
ROBI	10,738	0.8%	25.1x	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
ORIONINFU	315.0	+4.0%	142.6	NM	19.7x
DSSL	11.5	+4.5%	119.3	37.1x	0.6x
NRBBANK	13.1	-1.5%	87.4	21.6x	1.0x
AGNISYSL	26.0	-3.3%	68.1	21.8x	1.5x
RDFOOD	23.4	+0.9%	65.3	26.3x	1.4x
GENEXIL	31.7	-3.4%	65.1	12.7x	1.5x
BRACBANK	47.9	-0.4%	61.6	7.7x	1.1x
EMERALDOIL	25.8	-3.7%	57.4	19.9x	NM
ORIONPHARM	38.7	-2.8%	53.2	46.1x	0.4x
NEWLINE	8.2	-8.9%	51.8	15.8x	0.3x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MTB	12.1	12.1	2.0	5,000	60.50
MARICO	2,320.0	2,320.0	1.0	20	45.32
ORIONINFU	320.1	301.2	9.0	118	35.66
LOVELLO	86.1	83.0	8.0	354	29.64
RELIANCE1	20.3	19.0	7.0	663	12.84
AIL	95.2	92.5	2.0	99	9.20
1STPRIMFMF	46.0	44.8	3.0	190	8.59
RUPALILIFE	105.0	105.0	1.0	29	3.06
BXPHARMA	83.5	83.5	1.0	30	2.51
CITYGENINS	46.5	46.5	1.0	50	2.33

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MTB	12.1	12.1	60.5	5,000	2
MARICO	2,320.0	2,320.0	45.3	20	1
ORIONINFU	320.1	301.2	35.7	118	9
LOVELLO	86.1	83.0	29.6	354	8
RELIANCE1	20.3	19.0	12.8	663	7
AIL	95.2	92.5	9.2	99	2
1STPRIMFMF	46.0	44.8	8.6	190	3
RUPALILIFE	105.0	105.0	3.1	29	1
BXPHARMA	83.5	83.5	2.5	30	1
CITYGENINS	46.5	46.5	2.3	50	1
JAMUNAOIL	190.0	190.0	1.9	10	2
MONOSPOOL	138.0	130.0	1.9	14	2
SAPORTL	24.8	24.8	1.9	75	2
AFTABAUTO	38.1	32.5	1.8	50	2
AIBL1STIMF	6.8	6.8	1.4	200	2
QUEENSOUTH	12.8	12.8	1.3	100	1
PREMIERCEM	49.5	49.5	1.0	20	1
PREMIERCEM	49.5	49.5	1.0	20	1
SUNLIFEINS	70.0	70.0	1.0	14	1
CROWNCEMNT	46.5	46.5	0.9	20	1
SAIHAMCOT	14.9	14.9	0.7	50	1
SAIFPOWER	14.4	14.4	0.7	50	1
Total			229.9		60

Important DSE News
GEMINISEA

Refer to their earlier news disseminated by DSE on 14.11.2024 regarding dividend declaration, the company has informed that they have not obtained approval from BSEC yet for issuance of 7.50% Stock Dividend for the year ended 30 June 2024. The Record Date which was fixed on 5 December, 2024 is applicable for entitlement of 7.50% of Cash Dividend only. However, the Company will declare another Record Date for entitlement of Stock dividend after obtaining consent from BSEC.

POPULARLIF

The Company has informed that 3,853,554 shares of Late Hasan Ahmed, a sponsor shareholder and former Chairman of the company who passed away on 24.01.2022, will be transmitted among his successors according to the Succession Certificate issued by the Honorable Court.

CONFIDCEM

The Company will be placed in 'A' category from existing 'Z' category with effect from December 08, 2024 as the Company has reported disbursement of 10% Cash for the year ended June 30, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BDTHAIFOOD		0.0%	1%	Record Date	9-Dec-24
GHCL		0.0%	0%	Record Date	12-Dec-24
SKTRIMS		0.0%	2%	Record Date	12-Dec-24
GSPFINANCE		0.0%	0%	Record Date	12-Dec-24
MPETROLEUM		0.0%	170%	Record Date	15-Dec-24
EPGL		0.0%	0%	Record Date	15-Dec-24
SAMATALETH		0.0%	0%	Record Date	15-Dec-24
BDTHAI		0.0%	0%	Record Date	15-Dec-24
BEACHHATCH		0.0%	10%	Record Date	15-Dec-24
GOLDENSON		0.0%	2%	Record Date	15-Dec-24

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