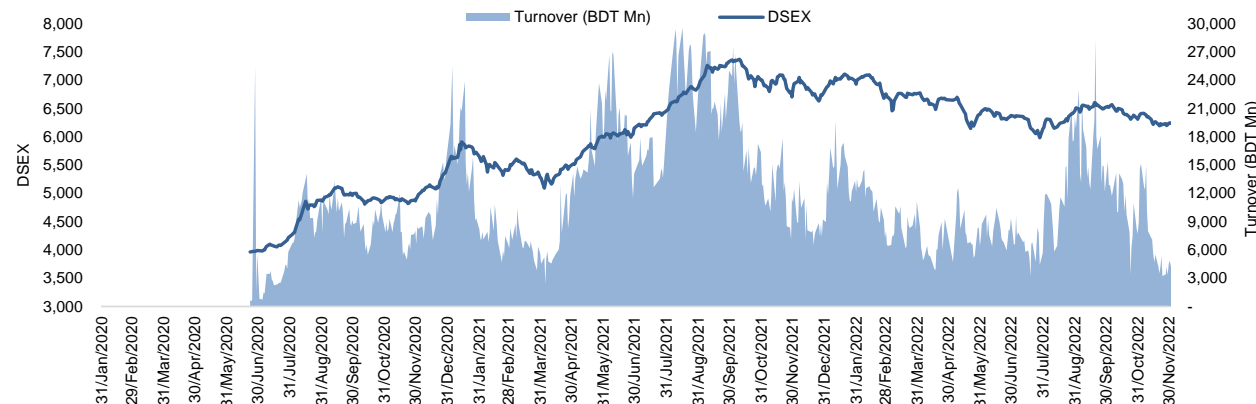


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.08%) gained 4.68 points and closed at 6,233.68. The blue-chip index DS30 (+0.08%), the Shariah-based index DSES (-0.04%), and the large-cap index CDSET (+0.03%) closed at 2,207.24, 1,363.54, and 1,219.37 points, respectively. Large-cap sectors posted mixed performance today. Pharmaceutical booked the highest gain of 0.32% followed by Engineering (+0.09%), Fuel & Power (+0.03%), Bank (+0.01%). Food & Allied experienced the highest loss of 0.08% followed by NBF (0.00%), NBF (0.00%). Block trades contributed 4.5% of the overall market turnover. Genex Infosys Limited (+1.3%) was the most traded share with a turnover of BDT 217 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,233.68	6,229.01	+4.68	+0.08%	-7.7%
DS30	2,207.24	2,205.58	+1.66	+0.08%	-12.8%
DSES	1,363.54	1,364.04	-0.50	-0.04%	-4.7%
CDSET	1,219.37	1,219.05	+0.32	+0.03%	-10.3%

	Advanced	Declined	Unchanged	Total
All Category	43	30	242	315
A Category (Equity)	34	19	168	221
B Category (Equity)	3	10	59	72
N Category (Equity)	4	1	4	9
Z Category (Equity)	2	0	11	13
Mutual Funds	0	1	17	18
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,631,453	7,630,848	
	Mn USD	73,379	73,374	+0.0%
Turnover	Mn BDT	3,113	2,720	+14.5%
	Mn USD	30	26	
Volume	Mn Shares	45	39	+15.6%
No. of Trade		69,531	66,834	+4.0%

\* Average Interbank Exchange Rate is BDT 104.00 as of Dec 06, 2022

<b>Fahim Hassan</b> Research Associate (880) 1709636546 fahim.hassan@bracepl.com	<b>Md. Tanvir Ahmed</b> Research Associate (880) 1708805201 mtanvir.ahmed@bracepl.com
---	--

Figure: Sectorial Turnover (BDT)

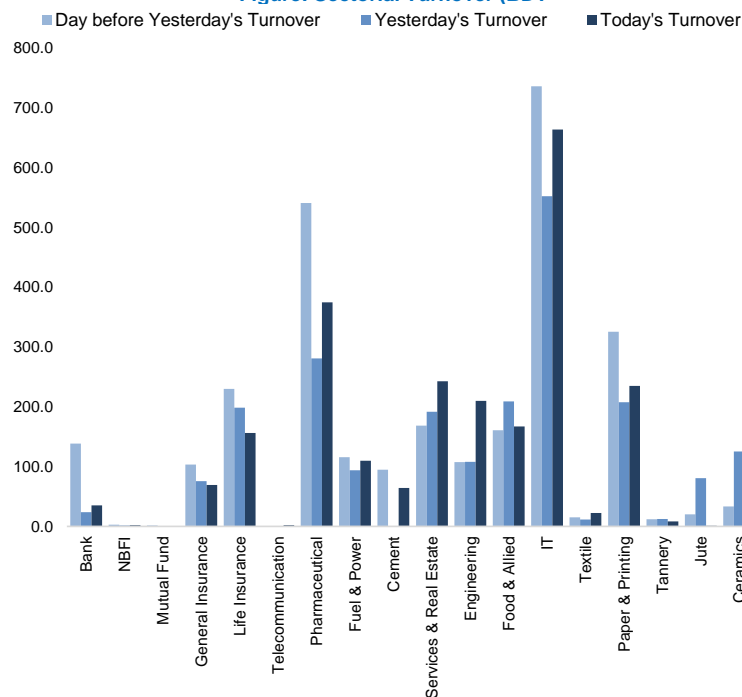
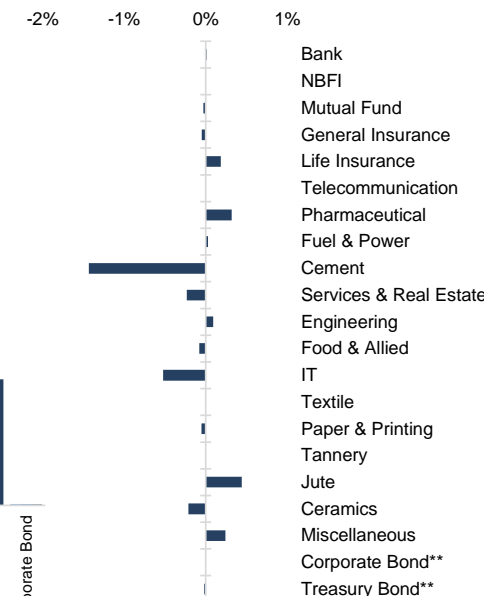


Figure: Sectorial Mcap Change



Market PE 16.9x  
Market PB 1.5x

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	1,429	1,429	+0.18	+0.01%	34	667,710	8.8%	35.3	1.3%	7.7x	0.7x	GP	386,996	8.6%	2.0	11.2x	9.1x
NBFI	1,921	1,921	-	-	23	187,435	2.5%	2.2	0.1%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-0.24	-0.03%	37	38,610	0.5%	0.3	0.0%	NM	0.8x	BATBC	280,098	6.2%	0.8	16.8x	6.7x
General Insurance	3,198	3,200	-1.58	-0.05%	41	92,750	1.2%	69.1	2.6%	15.7x	1.5x	SQURPHARMA	185,977	4.1%	2.6	10.0x	1.7x
Life Insurance	2,493	2,489	+4.61	+0.19%	14	69,928	0.9%	156.3	5.9%	NM	NM	ROBI	157,138	3.5%	0.1	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	2.1	0.1%	15.4x	4.9x	RENATA	139,689	3.1%	0.2	28.1x	4.6x
Pharmaceutical	3,777	3,765	+11.99	+0.32%	33	723,723	9.5%	374.4	14.2%	18.7x	2.4x	UPGDCL	135,475	3.0%	0.1	13.6x	3.8x
Fuel & Power	1,700	1,700	+0.45	+0.03%	23	448,297	5.9%	109.8	4.2%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.2	8.2x	1.2x
Cement	2,328	2,362	-33.85	-1.43%	7	111,806	1.5%	64.2	2.4%	33.6x	2.5x	BERGERPBL	80,313	1.8%	1.4	26.1x	7.0x
Services & Real Estate	1,768	1,772	-4.12	-0.23%	8	69,862	0.9%	242.5	9.2%	39.5x	0.9x	MARICO	76,277	1.7%	0.2	21.3x	44.9x
Engineering	4,499	4,495	+4.09	+0.09%	42	528,125	6.9%	210.1	8.0%	27.6x	1.8x	ICB	74,119	1.7%	0.3	68.1x	1.6x
Food & Allied	21,334	21,351	-17.09	-0.08%	21	380,133	5.0%	167.1	6.4%	21.6x	7.4x	BEACONPHAR	67,729	1.5%	25.3	83.3x	11.0x
IT	3,144	3,161	-16.51	-0.52%	11	40,992	0.5%	663.5	25.2%	29.2x	2.8x	BXPBARMA	66,203	1.5%	24.1	13.0x	1.6x
Textile	1,631	1,631	+0.05	+0.00%	58	171,584	2.3%	22.7	0.9%	31.2x	1.0x	BRACBANK	57,619	1.3%	1.4	10.9x	1.0x
Paper & Printing	10,527	10,533	-5.51	-0.05%	6	40,560	0.5%	235.0	8.9%	45.6x	2.0x	ISLAMIBANK	52,647	1.2%	7.1	10.7x	0.8x
Tannery	3,099	3,099	-	-	6	33,369	0.4%	8.3	0.3%	40.5x	3.1x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	12,443	12,388	+54.90	+0.44%	3	3,044	0.0%	1.2	0.0%	NM	107.4x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	697	698	-1.47	-0.21%	5	32,237	0.4%	52.7	2.0%	33.6x	1.9x	POWERGRID	37,347	0.8%	0.1	38.5x	0.4x
Miscellaneous	4,089	4,079	+9.84	+0.24%	15	229,361	3.0%	210.6	8.0%	12.5x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.0x	0.9x
Corporate Bond**	92	92	-	-	9	37,871	0.5%	1.6	0.1%	NM	NM	BSCCL	36,098	0.8%	0.0	14.9x	3.4x
Treasury Bond**	99	99	-0.02	-0.02%	250	3,128,996	41.1%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB	Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KDSALTD	84.5	+9.6%	126.8	34.1x	3.2x	SQURPHARMA	121,685	7.2%	10.0x	1.7x	GENEXIL	90.3	+1.3%	217.4	26.1x	5.0x
ORIONINFU	655.2	+7.5%	8.1	NM	44.3x	BATBC	74,086	4.4%	16.8x	6.7x	ORIONPHARM	86.9	+2.6%	170.4	21.5x	0.9x
AAMRATECH	40.8	+3.6%	74.2	26.1x	1.8x	BEXIMCO	70,355	4.2%	8.2x	1.2x	AAMRANET	56.5	-0.4%	145.3	24.7x	1.6x
JUTESPINN	231.2	+3.5%	1.1	NM	NM	RENATA	68,196	4.0%	28.1x	4.6x	BPML	76.3	-0.7%	141.7	20.5x	1.0x
SONALILIFE	58.5	+2.8%	11.1	NM	NM	BEACONPHAR	47,410	2.8%	83.3x	11.0x	BSC	115.5	+2.1%	137.4	8.0x	1.5x
SAPORTL	31.5	+2.6%	82.3	22.0x	0.9x	BXPBARMA	46,223	2.7%	13.0x	1.6x	KDSALTD	84.5	+9.6%	126.8	34.1x	3.2x
ORIONPHARM	86.9	+2.6%	170.4	21.5x	1x	GP	38,700	2.3%	11.2x	9.1x	EHL	81.8	+1.1%	102.2	13.3x	1.1x
BSC	115.5	+2.1%	137.4	8.0x	1.5x	BRACBANK	30,976	1.8%	10.9x	1.0x	SAPORTL	31.5	+2.6%	82.3	22.0x	0.9x
CLICL	61.9	+2.0%	55.1	NM	NM	LHBL	26,704	1.6%	18.4x	4.1x	AAMRATECH	40.8	+3.6%	74.2	26.1x	1.8x
ITC	34.5	+1.5%	53.6	17.3x	2.0x	EBL	23,659	1.4%	7.6x	1.0x	NAVANAPHAR	81.7	+0.9%	70.7	21.8x	1.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ADNTEL	111.1	-5.1%	60.8	37.4x	3.9x	RENATA	1,218.0	1,141.8	8.0	170	207.00
ADVENT	26.9	-3.9%	55.1	25.2x	2x	KDSALTD	82.0	82.0	1.0	400	32.80
BDTHAIFOOD	48.4	-3.2%	25.7	NM	3.4x	SEAPEARL	165.0	160.0	2.0	200	32.50
FINEFOODS	58.9	-2.5%	4.4	NM	5.5x	SQURPHARMA	209.8	207.6	13.0	113	23.57
SEAPEARL	172.9	-2.4%	32.6	64.0x	13.3x	ORIONINFU	655.2	570.0	4.0	39	22.59
APEXFOODS	286.6	-2.3%	40.9	44.3x	2.2x	SALVOCHEM	61.8	55.7	19.0	388	22.08
LHBL	65.1	-2.1%	63.8	18.4x	4.1x	ADNTEL	116.5	116.5	1.0	155	18.06
EGEN	57.3	-2.1%	22.1	39.8x	2.6x	BATBC	484.0	479.8	14.0	27	12.90
KAY&QUE	268.0	-1.9%	5.8	NM	3.6x	BSCCL	215.9	199.8	3.0	58	12.29
MONNOCERA	112.3	-1.6%	51.8	NM	1.4x	AIL	53.4	53.4	3.0	204	10.88

\* 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

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	Turnover (BDT Mn)	Quantity ('000)	No. of Trade	Important DSE News
RENATA	1,218.0	1,141.8	207.0	170	8	<b>PRIMEINSUR</b> The Company has informed that Ms. Tahera Akhter, one of the Directors of the company passed away on 10.06.2020. Her holding 62,905 shares will be transmitted to the account of her nominee Dr. Mostafizur Rahman (husband of Late Tahera Akhter) by way of nomination.
KDSALTD	82.0	82.0	32.8	400	1	
SEAPEARL	165.0	160.0	32.5	200	2	<b>SBACBANK</b> Referring to the BSEC letter No. BSEC/SRMIC/2021-204/528 dated November 21, 2022, Hazi Shakhawat Anwara Eye Hospital Limited, one of the Sponsor Directors of the Company, has expressed its intention to sell entire holding 3,48,21,563 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange within next 30 working days.
SQURPHARMA	209.8	207.6	23.6	113	13	
ORIONINFU	655.2	570.0	22.6	39	4	
SALVOCHEM	61.8	55.7	22.1	388	19	
ADNTEL	116.5	116.5	18.1	155	1	
BATBC	484.0	479.8	12.9	27	14	
BSCCL	215.9	199.8	12.3	58	3	
AIL	53.4	53.4	10.9	204	3	
DELTALIFE	135.0	135.0	10.0	74	1	
FORTUNE	78.0	78.0	9.9	127	1	
METROSPIN	43.5	43.5	8.7	200	2	<b>SKICL</b> The Company has informed that the Board of Directors has elected Major General Iftekhar Anis, BSP, awc, afwc, psc, PEng as the Chairman of the Company.
BSC	124.0	124.0	5.8	46	1	
BEACHHATCH	42.4	37.6	5.3	134	6	
INTRACO	42.0	38.0	5.2	133	2	
BEXIMCO	113.8	104.1	5.1	48	7	
EGEN	62.1	58.7	4.0	66	2	
GSPFINANCE	30.3	27.3	3.9	131	3	
GP	284.0	275.0	3.9	14	4	
BRACBANK	35.2	34.7	2.8	81	3	
NPOLYMER	46.0	45.9	2.5	54	4	
<b>Total</b>			<b>484.4</b>		<b>139</b>	

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
Eastern Cables Ltd.	-	0.0%	2.0%	Record Date	8-Dec-22
Pharma Aids	-	0.0%	50.0%	Record Date	8-Dec-22
Fu-Wang Ceramic Industries Ltd.	-	0.0%	2.0%	Record Date	8-Dec-22
Eastern Lubricants Ltd.	-	10.0%	40.0%	Record Date	11-Dec-22
Meghna Petroleum Limited	-	0.0%	150.0%	Record Date	11-Dec-22
Dominage Steel Building Systems Limited	-	0.0%	2.0%	Record Date	11-Dec-22
Ambee Pharmaceuticals Ltd.	-	20.0%	10.0%	Record Date	12-Dec-22
Rahima Food Corporation Limited	-	0.0%	5.0%	Record Date	13-Dec-22
Samata Leather Complex Ltd.	-	0.0%	0.0%	Record Date	15-Dec-22
Global Heavy Chemicals Limited	-	0.0%	2.0%	Record Date	18-Dec-22
Jamuna Oil Company Limited	-	0.0%	120.0%	Record Date	20-Dec-22
Beach Hatchery Ltd.	-	0.0%	1.5%	Record Date	22-Dec-22
Wata Chemicals Limited	-	0.0%	20.0%	Record Date	29-Dec-22

**Disclaimer:** This report has been prepared by BRAC EPL Stock Brokerage Ltd and is provided for information purposes. It is not, under any circumstances, to be used or considered as an offer to sell, or a solicitation of any offer to buy. Reasonable care has been taken to ensure that the information is not untrue and misleading. BRAC EPL Stock Brokerage Ltd makes no representation or warranty as to the accuracy or completeness of such information. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice.