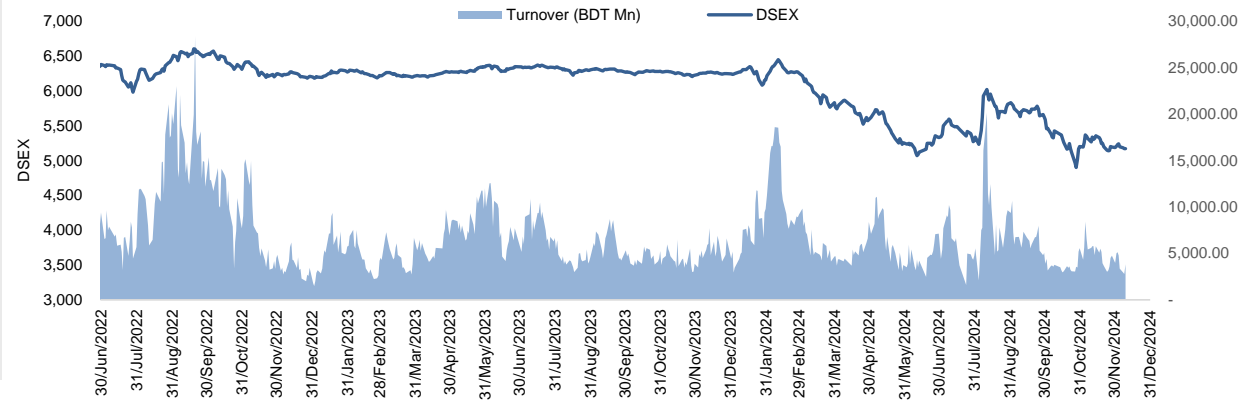


## Daily Market Update

The market closed in red today. The benchmark index DSEX (0.00%) lost 0.15 points and closed at 5,166.83. The blue-chip index DS30 (-0.02%), the Shariah-based index DSES (+0.04%), and the large-cap index CDSET (-0.01%) closed at 1,903.62, 1,154.54, and 1,053.61 points, respectively. Most of the large-cap sectors posted negative performance today. Food & Allied experienced the highest loss of 0.51% followed by Telecommunication (-0.51%), NBF1 (-0.24%), Bank (-0.09%), Pharmaceutical (-0.01%), Fuel & Power (+0.08%), and Engineering (+0.28%), respectively. Block trades contributed 3.3% of the overall market turnover. Saiham Cotton Mills Limited (+9.5%) was the most traded share with a turnover of BDT 132 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,166.83	5,166.98	-0.15	-0.00%	-17.3%
DS30	1,903.62	1,904.05	-0.43	-0.02%	-9.1%
DSES	1,154.54	1,154.12	+0.42	+0.04%	-15.4%
CDSET	1,053.61	1,053.68	-0.07	-0.01%	-12.4%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	185	147	73	405
<b>A Category (Equity)</b>	108	86	41	235
<b>B Category (Equity)</b>	37	33	11	81
<b>N Category (Equity)</b>	4	1	0	5
<b>Z Category (Equity)</b>	36	27	21	84
<b>Mutual Funds</b>	16	4	17	37
<b>Corporate Bonds</b>	3	1	1	5
<b>Treasury Bonds</b>	1	4	0	5

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	6,618,408	7,194,867	-8.0%
Mn USD	55,153	59,957	
<b>Turnover</b>			
Mn BDT	3,830	2,787	+37.5%
Mn USD	32	23	
<b>Volume</b>			
Mn Shares	163	127	+28.3%
<b>No. of Trade</b>	131,043	109,069	+20.1%

\* Average Interbank Exchange Rate is BDT 120.00 as of Dec 10, 2024

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Figure: Sectorial Turnover (BDT Mn)

Day before Yesterday's Turnover    Yesterday's Turnover    Today's Turnover

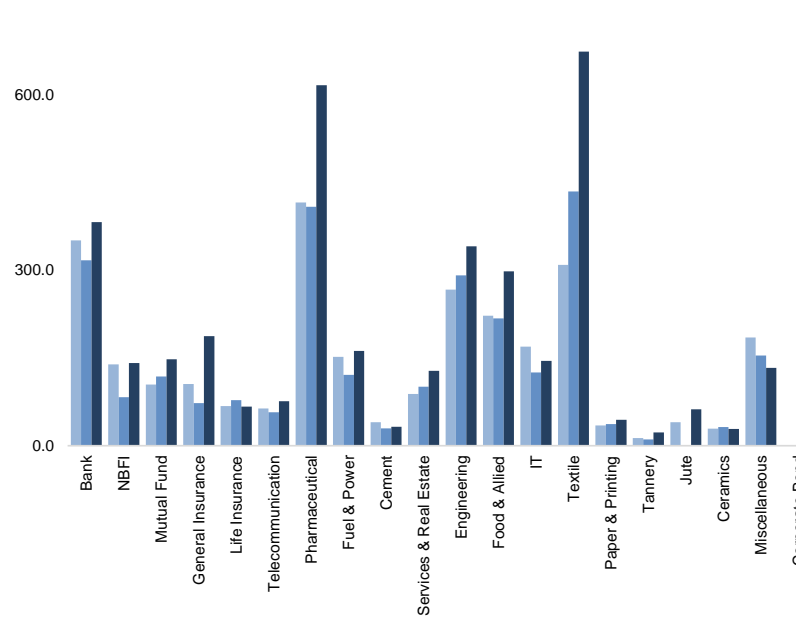
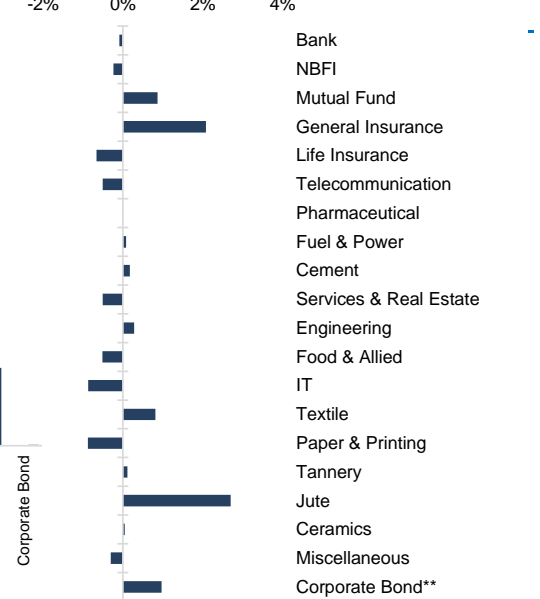


Figure: Sectorial Mcap Change

-2%    0%    2%    4%



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	1,425	1,426	-1.23	-0.09%	36	674,338	10.2%	382.0	10.3%	8.7x	0.7x	GP	427,100	11.9%	34.3	12.1x	7.4x
NBFI	1,296	1,299	-3.11	-0.24%	23	123,530	1.9%	141.3	3.8%	NM	NM	SQURPHARMA	191,296	5.3%	43.0	9.1x	1.4x
Mutual Fund	614	609	+5.30	+0.87%	37	28,240	0.4%	147.7	4.0%	NM	0.5x	BATBC	186,732	5.2%	28.1	10.6x	3.0x
General Insurance	2,793	2,736	+56.93	+2.08%	43	79,731	1.2%	187.0	5.1%	14.4x	1.2x	WALTONHIL	147,132	4.1%	4.0	11.3x	1.3x
Life Insurance	1,866	1,879	-12.43	-0.66%	15	49,640	0.8%	66.7	1.8%	NM	NM	ROBI	138,281	3.9%	37.2	25.1x	2.1x
Telecommunication	5,006	5,032	-25.44	-0.51%	3	587,022	8.9%	75.9	2.0%	13.9x	4.2x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,925	2,925	-0.30	-0.01%	34	554,456	8.4%	615.8	16.6%	14.1x	1.5x	BRACBANK	85,831	2.4%	69.6	7.7x	1.1x
Fuel & Power	1,137	1,136	+0.95	+0.08%	23	300,916	4.5%	162.1	4.4%	14.3x	0.6x	BERGERPBL	82,112	2.3%	2.1	24.7x	5.2x
Cement	1,981	1,978	+3.42	+0.17%	7	94,413	1.4%	32.4	0.9%	15.9x	2.0x	ISLAMIBANK	77,280	2.2%	41.7	16.6x	1.1x
Services & Real Estate	1,041	1,046	-5.25	-0.50%	9	57,230	0.9%	127.9	3.5%	19.1x	0.4x	UPGDCL	74,491	2.1%	1.2	7.1x	1.9x
Engineering	2,501	2,494	+7.06	+0.28%	42	282,137	4.3%	340.6	9.2%	12.4x	0.9x	MARICO	71,789	2.0%	0.9	13.5x	9.4x
Food & Allied	16,534	16,620	-85.30	-0.51%	21	302,533	4.6%	297.8	8.0%	16.2x	4.3x	LHB	62,366	1.7%	3.8	15.4x	3.1x
IT	2,008	2,026	-17.68	-0.87%	11	26,488	0.4%	145.1	3.9%	19.5x	1.7x	ICB	61,402	1.7%	78.7	31.6x	1.4x
Textile	1,107	1,098	+8.98	+0.82%	58	114,868	1.7%	673.5	18.2%	72.5x	0.8x	UNILEVERCL	49,342	1.4%	0.0	67.1x	21.0x
Paper & Printing	4,158	4,195	-36.87	-0.88%	6	18,784	0.3%	44.3	1.2%	NM	0.8x	DUTCHBANGL	42,535	1.2%	1.3	6.8x	0.9x
Tannery	1,971	1,969	+2.24	+0.11%	6	21,960	0.3%	22.7	0.6%	67.2x	1.5x	BXPHERMA	38,187	1.1%	103.4	6.4x	0.8x
Jute	15,112	14,714	+397.41	+2.70%	3	3,326	0.1%	62.3	1.7%	NM	NM	POWERGRID	37,649	1.1%	2.2	NM	0.2x
Ceramics	369	369	+0.17	+0.05%	5	16,541	0.2%	28.8	0.8%	NM	1.0x	PUBALIBANK	32,160	0.9%	3.9	3.4x	0.6x
Miscellaneous	4,176	4,189	-12.67	-0.30%	15	226,777	3.4%	133.0	3.6%	41.0x	1.8x	OLYMPIC	31,850	0.9%	7.5	17.3x	2.8x
Corporate Bond**	12,991	12,866	+124.98	+0.97%	16	34,891	0.5%	1.6	0.0%	NM	NM	EBL	31,645	0.9%	3.7	4.8x	0.7x
Treasury Bond**	520	618	-98.68	-15.96%	235	3,019,767	45.6%	15.1	0.4%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SAIHAMTEX	16.9	+9.7%	48.2	26.0x	0.4x
SAIHAMCOT	16.1	+9.5%	132.2	16.3x	0.4x
NEWLINE	8.6	+8.9%	82.1	16.5x	0.3x
TAKAFULINS	36.1	+7.8%	0.1	24.4x	1.9x
PARAMOUNT	42.5	+7.3%	8.5	17.2x	1.6x
MHSML	15.9	+6.71%	7.9	18.9x	0.8x
CRYSTALINS	55.8	+6.5%	39.2	17.6x	2x
VAMLBDMF1	5.6	+5.7%	0.0	NM	0.5x
ICBPMF1S1	5.6	+5.7%	0.2	NM	1.0x
MEGHNAINS	28.8	+5.5%	22.1	24.8x	2.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
AIL	83.1	-6.4%	24.4	32.0x	3.3x
EMERALDOIL	23.1	-5.3%	27.0	17.8x	NM
ORIONINFU	290.8	-4.9%	100.2	NM	18.2x
KBPPWBIL	136.1	-4.4%	38.8	NM	11.4x
LOVELLO	81.0	-4.3%	97.0	44.1x	6.2x
RUPALILIFE	101.0	-3.6%	10.9	NM	NM
SINOBANGLA	39.6	-3.4%	9.1	27.4x	1.5x
MONNOCERA	67.9	-3.4%	3.9	NM	0.8x
1STPRIMFMF	37.1	-3.4%	45.4	NM	3.5x
GENEXIL	29.7	-3.3%	61.6	11.9x	1.4x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.1x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.6x	3.0x
RENATA	35,002	2.6%	22.9x	2.1x
ISLAMIBANK	33,649	2.5%	16.6x	1.1x
BXPHERMA	32,479	2.4%	6.4x	0.8x
BRACBANK	32,157	2.4%	7.7x	1.1x
GP	30,004	2.2%	12.1x	7.4x
LHB	24,690	1.8%	15.4x	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	3.0x
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%	44.5x	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
SAIHAMCOT	16.1	+9.5%	132.2	16.3x	0.4x
BXPHERMA	85.6	+2.5%	103.4	6.4x	0.8x
ORIONINFU	290.8	-4.9%	100.2	NM	18.2x
LOVELLO	81.0	-4.3%	97.0	44.1x	6.2x
ASIATICLAB	35.2	+0.9%	92.0	14.9x	0.7x
DSSL	12.7	+3.3%	85.3	41.0x	0.7x
NEWLINE	8.6	+8.9%	82.1	16.5x	0.3x
NRBBANK	13.0	-2.3%	80.2	21.4x	1.0x
ICB	70.8	-0.4%	78.7	31.6x	1.4x
BRACBANK	48.5	+1.3%	69.6	7.7x	1.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
MTB	12.1	12.1	2.0	4,000	48.40
IDLC	36.0	36.0	2.0	500	18.00
GPHISPAT	20.5	20.5	2.0	700	14.35
CENTRALINS	45.2	44.2	2.0	150	6.73
RELIANCE1	19.0	19.0	3.0	338	6.42
LOVELLO	90.0	85.4	3.0	68	6.03
AIL	95.8	81.0	4.0	62	5.32
FINEFOODS	214.5	214.1	2.0	24	5.14
PREMIERCEM	49.8	48.0	2.0	45	2.20
NRBBANK	12.2	12.2	1.0	138	1.68

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
MTB	12.1	12.1	48.4	4,000	2
IDLC	36.0	36.0	18.0	500	2
GPHISPAT	20.5	20.5	14.4	700	2
CENTRALINS	45.2	44.2	6.7	150	2
RELIANCE1	19.0	19.0	6.4	338	3
LOVELLO	90.0	85.4	6.0	68	3
AIL	95.8	81.0	5.3	62	4
FINEFOODS	214.5	214.1	5.1	24	2
PREMIERCEM	49.8	48.0	2.2	45	2
NRBBANK	12.2	12.2	1.7	138	1
MONOSPOOL	131.0	130.0	1.6	12	2
DBH1STMF	4.4	4.4	1.5	341	1
EIL	59.0	59.0	1.5	25	1
SIMTEX	18.4	18.4	1.2	66	1
HAMI	72.0	71.0	1.1	15	2
SUNLIFEINS	66.5	63.5	1.0	16	2
1STPRIMFMF	42.0	42.0	0.6	15	1
1STPRIMFMF	42.0	42.0	0.6	15	1
DACCADYE	12.0	12.0	0.6	50	1
SIBL	9.9	9.9	0.6	60	1
ASIATICLAB	37.0	37.0	0.6	15	1
ORIONINFU	317.3	317.3	0.6	2	1
<b>Total</b>			<b>126.9</b>		<b>40</b>

**Important DSE News**
**BERGERPBL**

The company has informed that the Board of Directors of the company in its 200th meeting held on December 9, 2024 passed the following decision in relation to financing a portion of the Third Factory Project through issuance of Rights Shares and holding of the 10th Extraordinary General Meeting to approve the proposed Rights Shares, among other agenda: Issuance of Rights Share: The Board of Directors has decided to increase paid-up capital of the Company through issuance of 1:17 Rights Share (1 Rights Share against 17 existing shares of the Company) to all the shareholders at an issue price of BDT 1,110 per share including premium of BDT 1,100 for each Right Share subject to the approval of the members in the ensuing Extraordinary General Meeting (EGM) and subsequently by Bangladesh Securities and Exchange Commission (BSEC). In this process the Company intends to raise BDT 3.03 billion by issuing 2,728,111 ordinary shares (2,591,691 shares to be offered to J&N Investments (Asia) Limited which holds 95% shares of the Company, and 136,420 shares to be offered to the other shareholders). The proceeds of the Rights Issue will be utilized for financing a portion of the establishment of its third factory at National Special Economic Zone. J & N Investments (Asia) Limited, the holder of 95% shares, intends to renounce the entire Rights Offer (2,591,691 shares) to other shareholders (2,182,720 shares) and the remaining shares to the employees of the Company (408,971 shares) for increasing dilution/free-float to at least 10% in line with BSEC's letter No. BSEC/SRMIC/2021/221 dated September 12, 2021 regarding the increase of free-float shares through the use of hybrid platform to accord approval to the Rights Issuance and renouncement plan. Members will have the option to participate either in person at the location of the EGM or virtually. The link for voting and virtually attending the EGM is [HTTPS://BERGER.BDVIRTUALAGM.COM](https://BERGER.BDVIRTUALAGM.COM). Venue of the EGM will be notified later. Record Date: January 2, 2025 will be the Record Date for the EGM and the shareholders whose names would appear in the Register of Members of the Company on the Record Date shall be entitled to attend and vote at the EGM. A separate Record Date for the entitlement of the Rights Share will be declared after Bangladesh Securities and Exchange Commission accords approval to the Rights Share offer.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
ECABLES	0.0%	2%		Record Date	17-Dec-24
AGNISYSL	0.0%	5%		Record Date	17-Dec-24
RINGSHINE	0.0%	0%		Record Date	18-Dec-24
DSSL	0.0%	1%		Record Date	19-Dec-24
PHARMAID	0.0%	25%		Record Date	24-Dec-24
JAMUNAOIL	0.0%	150%		Record Date	24-Dec-24

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