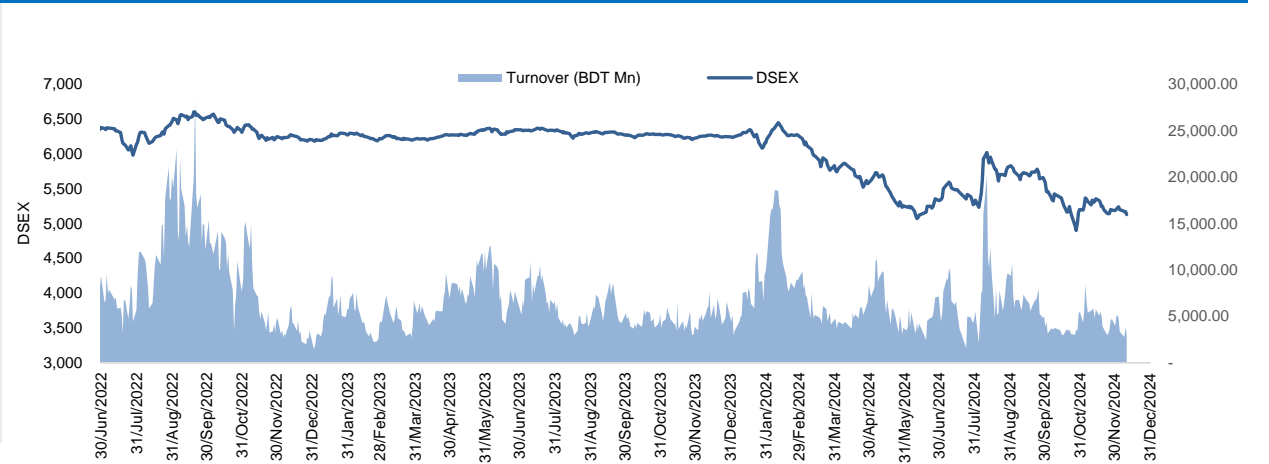


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.82%) lost 42.33 points and closed at 5,124.50. The blue-chip index DS30 (-0.75%), the Shariah-based index DSES (-1.08%), and the large-cap index CDSET (-0.59%) closed at 1,889.42, 1,142.10, and 1,047.42 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 2.26% followed by Bank (-1.26%), Fuel & Power (-1.13%), Telecommunication (-0.92%), Food & Allied (-0.63%), Engineering (-0.58%), and Pharmaceutical (-0.45%), respectively. Block trades contributed 2.4% of the overall market turnover. Asiatic Laboratories Limited (+4.3%) was the most traded share with a turnover of BDT 117 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,124.50	5,166.83	-42.33	-0.82%	-18.0%
DS30	1,889.42	1,903.62	-14.20	-0.75%	-9.8%
DSES	1,142.10	1,154.54	-12.44	-1.08%	-16.3%
CDSET	1,047.42	1,053.61	-6.19	-0.59%	-12.9%

	Advanced	Declined	Unchanged	Total
All Category	50	291	58	399
A Category (Equity)	28	174	28	230
B Category (Equity)	11	63	7	81
N Category (Equity)	2	2	0	4
Z Category (Equity)	9	52	23	84
Mutual Funds	0	27	10	37
Corporate Bonds	3	1	0	4
Treasury Bonds	0	1	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,533,577	6,618,408	-1.3%
	Mn USD	54,446	55,153	
Turnover	Mn BDT	3,042	3,830	-20.6%
	Mn USD	25	32	
Volume	Mn Shares	125	163	-23.7%
No. of Trade		116,982	131,043	-10.7%

* Average Interbank Exchange Rate is BDT 120.00 as of Dec 11, 2024

Fahim Hassan Research Analyst (891) 1709636546 fahim.hassan@bracepl.com	Md Istiaz Uddin Research Associate (891) 1708915202 mistiaz.uddin@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

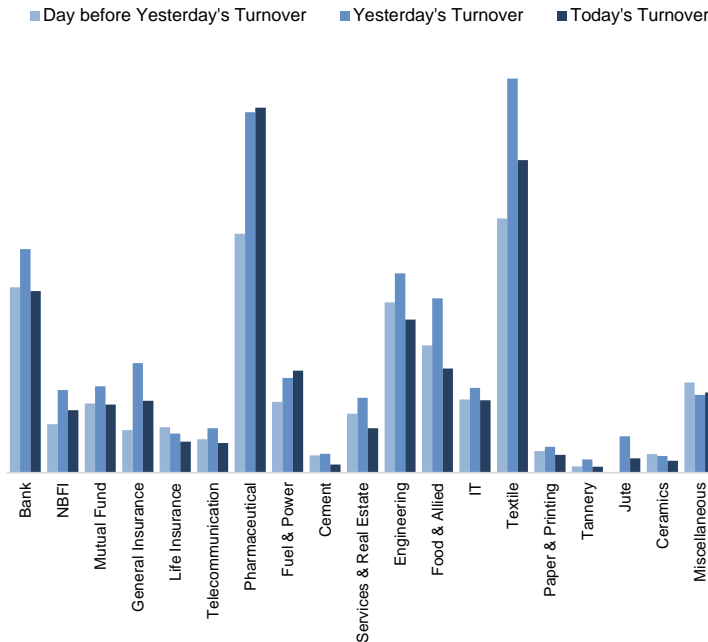
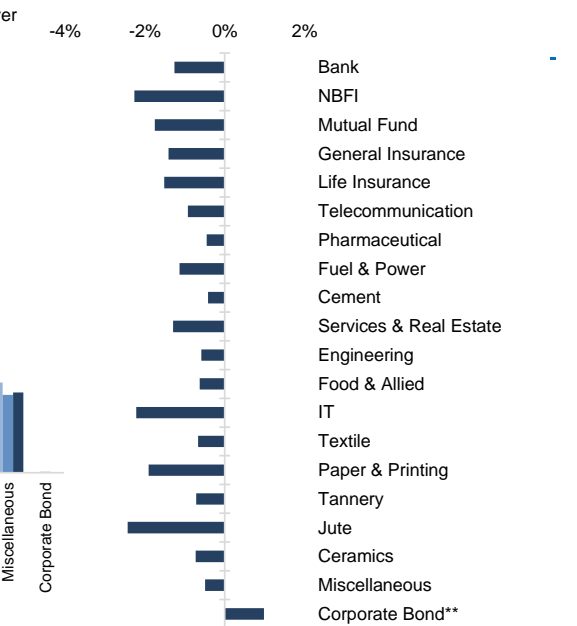


Figure: Sectorial Mcap Change



Market PE 14.5x
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	1,407	1,425	-17.90	-1.26%	36	665,867	10.2%	310.2	10.5%	8.6x	0.7x	GP	423,319	11.9%	32.0	12.0x	7.3x
NBFI	1,267	1,296	-29.30	-2.26%	23	120,738	1.8%	106.6	3.6%	NM	NM	SQURPHARMA	190,321	5.4%	50.9	9.1x	1.4x
Mutual Fund	604	614	-10.75	-1.75%	37	27,746	0.4%	116.6	3.9%	NM	0.5x	BATBC	185,760	5.2%	19.1	10.6x	3.0x
General Insurance	2,754	2,793	-39.37	-1.41%	43	78,607	1.2%	122.9	4.1%	14.2x	1.2x	WALTONHIL	146,436	4.1%	2.1	11.2x	1.3x
Life Insurance	1,838	1,866	-28.22	-1.51%	15	48,889	0.7%	53.1	1.8%	NM	NM	ROBI	136,710	3.9%	16.5	24.9x	2.1x
Telecommunication	4,960	5,006	-46.28	-0.92%	3	581,595	8.9%	50.7	1.7%	13.8x	4.1x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,911	2,925	-13.28	-0.45%	34	551,939	8.4%	623.5	21.0%	14.0x	1.5x	BRACBANK	85,300	2.4%	28.2	7.7x	1.1x
Fuel & Power	1,123	1,136	-12.85	-1.13%	23	297,322	4.6%	174.1	5.9%	14.2x	0.6x	BERGERPBL	82,571	2.3%	2.1	24.8x	5.2x
Cement	1,973	1,981	-8.23	-0.42%	7	94,020	1.4%	13.9	0.5%	15.8x	2.0x	ISLAMIBANK	74,382	2.1%	59.4	15.9x	1.0x
Services & Real Estate	1,027	1,041	-13.49	-1.30%	9	56,488	0.9%	76.0	2.6%	18.8x	0.4x	UPGDCL	73,331	2.1%	1.3	7.0x	1.9x
Engineering	2,486	2,501	-14.57	-0.58%	42	280,494	4.3%	261.7	8.8%	12.3x	0.8x	MARICO	71,864	2.0%	0.4	13.6x	9.4x
Food & Allied	16,431	16,534	-103.57	-0.63%	21	300,638	4.6%	177.9	6.0%	16.1x	4.2x	LHB	62,366	1.8%	3.8	15.4x	3.1x
IT	1,964	2,008	-44.55	-2.22%	11	25,901	0.4%	123.7	4.2%	19.0x	1.6x	ICB	59,754	1.7%	33.2	30.7x	1.3x
Textile	1,099	1,107	-7.41	-0.67%	58	114,099	1.7%	533.9	18.0%	73.2x	0.7x	UNILEVERCL	49,957	1.4%	0.5	68.0x	21.3x
Paper & Printing	4,078	4,158	-79.34	-1.91%	6	18,425	0.3%	30.5	1.0%	NM	0.8x	DUTCHBANGL	41,129	1.2%	3.7	6.6x	0.8x
Tannery	1,957	1,971	-14.06	-0.71%	6	21,803	0.3%	10.1	0.3%	66.7x	1.5x	BXPHARMA	38,544	1.1%	98.5	6.4x	0.8x
Jute	14,744	15,112	-367.84	-2.43%	3	3,245	0.0%	24.3	0.8%	NM	NM	POWERGRID	37,101	1.0%	1.9	NM	0.2x
Ceramics	366	369	-2.69	-0.73%	5	16,420	0.3%	20.5	0.7%	NM	1.0x	PUBALIBANK	32,044	0.9%	4.9	3.3x	0.6x
Miscellaneous	4,156	4,176	-20.46	-0.49%	15	225,666	3.5%	137.2	4.6%	40.8x	1.8x	EBL	31,509	0.9%	2.6	4.8x	0.7x
Corporate Bond**	13,118	12,991	+127.53	+0.98%	16	34,914	0.5%	0.1	0.0%	NM	NM	OLYMPIC	30,811	0.9%	9.5	16.8x	2.7x
Treasury Bond**	518	520	-1.23	-0.24%	234	2,967,724	45.4%	0.5	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
HRTEX	35.4	+6.6%	13.1	NM	1.0x
MIRACLEIND	29.8	+6.0%	34.1	NM	2.3x
METROSPIN	10.5	+5.0%	3.5	NM	1.7x
ASIATICLAB	36.7	+4.3%	117.2	15.6x	0.7x
QUASEMIND	30.0	+3.8%	41.4	78.9x	1.1x
INTRACO	21.2	+3.41%	52.5	25.5x	1.7x
LOVELLO	83.5	+3.1%	51.4	45.5x	6x
SHURWID	6.7	+3.1%	0.1	NM	0.5x
FIRSTFIN	3.4	+3.0%	0.1	NM	NM
ILFSL	3.8	+2.7%	0.2	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.1x	1.4x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.6x	3.0x
RENATA	35,002	2.6%	22.8x	2.1x
ISLAMIBANK	33,649	2.5%	15.9x	1.0x
BXPHARMA	32,479	2.4%	6.4x	0.8x
BRACBANK	32,157	2.4%	7.7x	1.1x
GP	30,004	2.2%	12.0x	7.3x
LHB	24,690	1.8%	15.4x	3.1x
EBL	24,199	1.8%	4.8x	0.7x
PUBALIBANK	20,448	1.5%	3.3x	0.6x
NBL	16,930	1.2%	NM	2.9x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	4.7x	0.5x
ALARABANK	13,534	1.0%	12.7x	0.9x
PRIMEBANK	12,985	1.0%	4.1x	0.7x
OLYMPIC	12,616	0.9%	16.8x	2.7x
UTTARABANK	11,350	0.8%	7.5x	0.7x
ORIONPHARM	11,317	0.8%	42.7x	0.4x
ROBI	10,738	0.8%	24.9x	2.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ASIATICLAB	36.7	+4.3%	117.2	15.6x	0.7x
BXPHARMA	86.4	+0.9%	98.5	6.4x	0.8x
DSSL	12.1	-4.7%	89.7	39.0x	0.7x
ORIONPHARM	35.9	-4.0%	87.0	42.7x	0.4x
ORIONINFU	294.5	+1.3%	81.5	NM	18.4x
SAIHAMCOT	16.2	+0.6%	70.9	16.4x	0.4x
ISLAMIBANK	46.2	-3.7%	59.4	15.9x	1.0x
NRBBANK	12.7	-2.3%	55.2	20.9x	1.0x
INTRACO	21.2	+3.4%	52.5	25.5x	1.7x
LOVELLO	83.5	+3.1%	51.4	45.5x	6.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	122.5	-10.0%	32.9	NM	10.3x
MIDLANDBNK	29.3	-9.3%	31.9	16.9x	2x
1STPRIMFMF	33.9	-8.6%	41.7	NM	3.2x
NEWLIN	8.1	-5.8%	24.3	15.6x	0.3x
FINEFOODS	203.5	-5.7%	29.0	NM	17.1x
FAREASTFIN	3.5	-5.4%	0.1	NM	NM
AIBL1STIMF	7.0	-5.4%	0.9	NM	0.8x
PF1STMF	5.4	-5.3%	2.8	NM	0.9x
SAFKOSPINN	9.4	-5.1%	0.3	NM	NM
DSSL	12.1	-4.7%	89.7	39.0x	0.7x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ALARABANK	19.3	19.3	1.0	1,104	21.31
AIL	89.5	87.0	3.0	118	10.40
LOVELLO	87.0	87.0	4.0	81	7.05
MJLBD	97.5	97.5	1.0	52	5.07
BEACHHATCH	103.7	103.7	1.0	40	4.15
AL-HAJTEX	118.0	117.5	4.0	21	2.49
IPDC	18.2	18.2	1.0	136	2.47
AGNISYSL	28.0	28.0	1.0	60	1.68
GBBPOWER	7.0	7.0	1.0	200	1.40
NRBBANK	13.5	11.9	2.0	101	1.28

* 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	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ALARABANK	19.3	19.3	21.3	1,104	1
AIL	89.5	87.0	10.4	118	3
LOVELLO	87.0	87.0	7.0	81	4
MJLBD	97.5	97.5	5.1	52	1
BEACHHATCH	103.7	103.7	4.1	40	1
AL-HAJTEX	118.0	117.5	2.5	21	4
IPDC	18.2	18.2	2.5	136	1
AGNISYSL	28.0	28.0	1.7	60	1
GBBPOWER	7.0	7.0	1.4	200	1
NRBBANK	13.5	11.9	1.3	101	2
QUEENSOUTH	12.7	12.7	1.3	101	1
EIL	55.2	55.2	1.2	21	1
SQURPHARMA	230.0	230.0	1.2	5	1
CVOPRL	112.5	112.5	1.1	10	1
NLTUBES	78.5	78.5	1.1	14	1
MONOSPOOL	128.0	128.0	1.1	9	1
BEXIMCO	99.1	99.1	1.0	10	1
BEXIMCO	99.1	99.1	1.0	10	1
NAVANAPHAR	50.9	50.9	1.0	19	1
SUNLIFEINS	68.8	68.8	1.0	14	1
AFTABAUTO	38.3	38.3	1.0	25	1
ORIONINFU	309.0	309.0	0.8	3	1
Total			74.2		38

Important DSE News
PTL

(Q1 Un-audited): Consolidated EPS was Tk. 1.07 for July-September 2024 as against Tk. 1.34 for July-September 2023; Consolidated NOCFPS was Tk. 1.67 for July-September 2024 as against Tk. 1.35 for July-September 2023. Consolidated NAV per share was Tk. 42.71 as on September 30, 2024 and Tk. 41.72 as on June 30, 2024. The company's EPS has declined due to the closure of business operation of one of its associate company.

LANKABAFIN

The company has informed that Bangladesh Bank has given its consent to make necessary amendments (as approved by the shareholders of the Company) in the Memorandum & Articles of Association of LankaBangla Finance PLC in order to proceed with introduction of Islamic Shariah based financing. However, as per instructions of Bangladesh Bank the following clause will have to be included in clause no. 160 of the Articles of Association of the Company: Clause approved by Bangladesh Bank - Clause no. 160: The remuneration of the members of the Shariah Supervisory Committee shall from time to time be determined by the Board of Directors. The members may also be paid all traveling, hotel and other expenses that may be incurred by them in connection with the tasks of the Committee. Such remuneration and associated expenses must comply with the applicable regulations issued by the regulatory authority from time to time.

BANKASIA

Dhaka Stock Exchange PLC. (DSE) has approved the transfer of total 3,000,000 shares of Bank Asia PLC. of Mrs. Hosneara Sinha, a sponsor of the company, to Union Capital Limited (the transferee) within 30 working days with effect from December 09, 2024 under Regulation 47 (1)(d) of the Dhaka Stock Exchange (Listing) Regulations, 2015 as well as other applicable laws.

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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