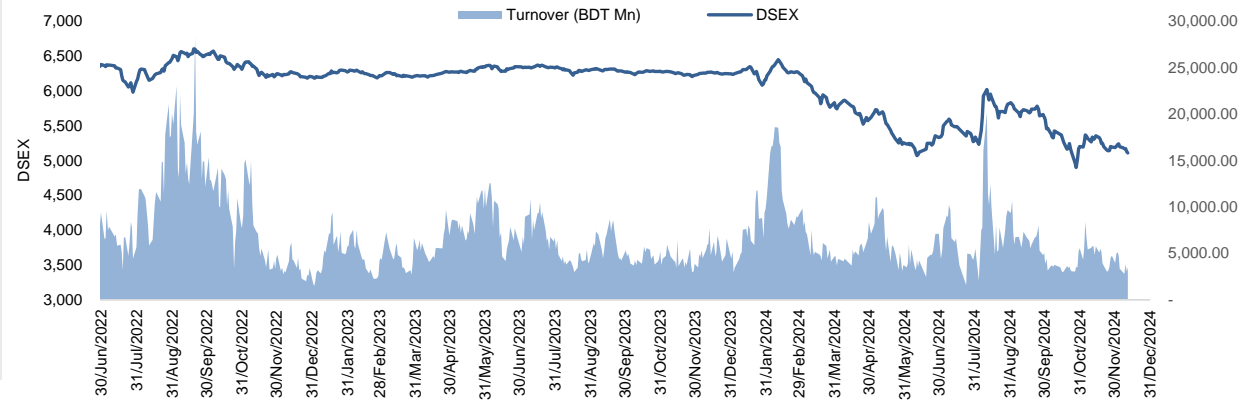


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.37%) lost 19.07 points and closed at 5,105.43. The blue-chip index DS30 (-0.40%), the Shariah-based index DSES (-0.18%), and the large-cap index CDSET (-0.48%) closed at 1,881.90, 1,140.05, and 1,042.43 points, respectively. Most of the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 0.75% followed by Food & Allied (-0.70%), Pharmaceutical (-0.47%), Fuel & Power (-0.26%), Engineering (-0.25%), Bank (-0.06%), and Telecommunication (+0.16%), respectively. Block trades contributed 22.0% of the overall market turnover. Orion Infusion Ltd. (+8.7%) was the most traded share with a turnover of BDT 169 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,105.43	5,124.50	-19.07	-0.37%	-18.3%
DS30	1,881.90	1,889.42	-7.53	-0.40%	-10.1%
DSES	1,140.05	1,142.10	-2.06	-0.18%	-16.4%
CDSET	1,042.43	1,047.42	-4.99	-0.48%	-13.3%

	Advanced	Declined	Unchanged	Total
All Category	105	198	91	394
A Category (Equity)	61	120	49	230
B Category (Equity)	22	44	15	81
N Category (Equity)	0	4	0	4
Z Category (Equity)	22	30	27	79
Mutual Funds	3	10	24	37
Corporate Bonds	3	0	0	3
Treasury Bonds	0	2	0	2

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,524,964	6,533,577	-0.1%
Mn USD	54,375	54,446	
Turnover			
Mn BDT	3,516	3,042	+15.6%
Mn USD	29	25	
Volume			
Mn Shares	113	125	-8.9%
No. of Trade	102,838	116,982	-12.1%

* Average Interbank Exchange Rate is BDT 120.00 as of Dec 12, 2024

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Figure: Sectorial Turnover (BDT Mn)

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

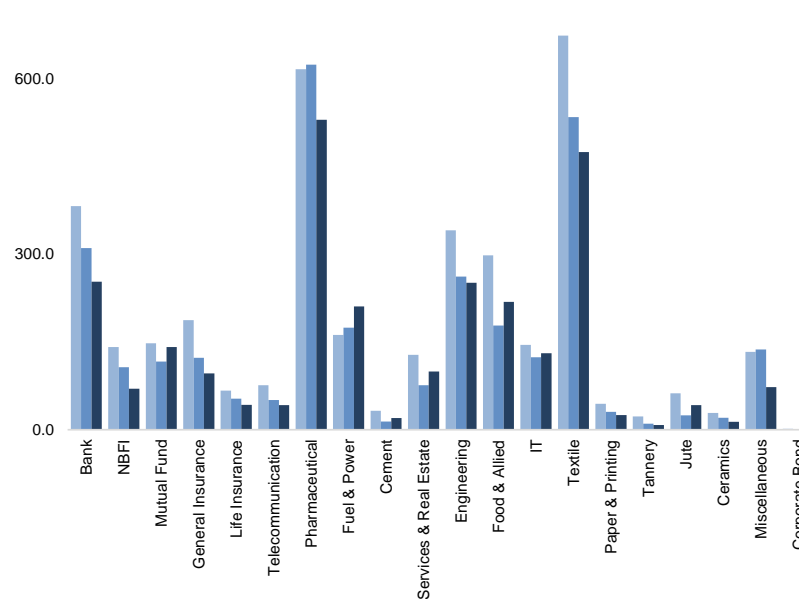
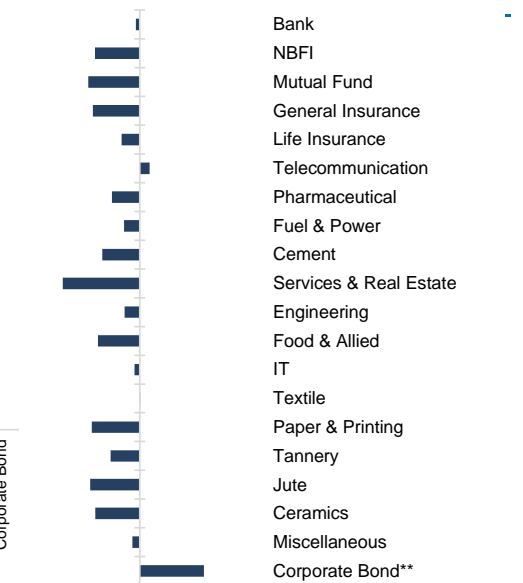


Figure: Sectorial Mcap Change

-2% -1% 0% 1% 2%



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	1,406	1,407	-0.91	-0.06%	36	665,438	10.2%	253.1	9.2%	8.6x	0.7x	GP	424,804	12.0%	12.2	12.0x	7.4x
NBFI	1,258	1,267	-9.46	-0.75%	23	119,836	1.8%	70.3	2.6%	NM	NM	SQURPHARMA	188,282	5.3%	36.7	9.0x	1.4x
Mutual Fund	598	604	-5.20	-0.86%	37	27,507	0.4%	141.1	5.1%	NM	0.5x	BATBC	184,248	5.2%	25.9	10.5x	3.0x
General Insurance	2,732	2,754	-21.57	-0.78%	43	77,992	1.2%	96.5	3.5%	14.1x	1.2x	WALTONHIL	145,981	4.1%	2.1	11.2x	1.3x
Life Insurance	1,833	1,838	-5.60	-0.30%	15	48,740	0.7%	42.3	1.5%	NM	NM	ROBI	136,186	3.8%	27.7	24.8x	2.1x
Telecommunication	4,968	4,960	+8.04	+0.16%	3	582,538	8.9%	42.2	1.5%	13.8x	4.1x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,898	2,911	-13.55	-0.47%	34	549,371	8.4%	529.6	19.3%	14.0x	1.5x	BRACBANK	85,477	2.4%	14.8	7.7x	1.1x
Fuel & Power	1,120	1,123	-2.97	-0.26%	23	296,536	4.5%	210.6	7.7%	14.1x	0.6x	BERGERPBL	82,131	2.3%	1.0	24.7x	5.2x
Cement	1,961	1,973	-12.38	-0.63%	7	93,430	1.4%	20.1	0.7%	15.7x	2.0x	ISLAMIBANK	73,416	2.1%	28.1	15.7x	1.0x
Services & Real Estate	1,014	1,027	-13.22	-1.29%	9	55,761	0.9%	99.3	3.6%	18.6x	0.4x	UPGDCL	73,216	2.1%	2.4	7.0x	1.9x
Engineering	2,480	2,486	-6.32	-0.25%	42	279,780	4.3%	251.2	9.2%	12.3x	0.8x	MARICO	71,842	2.0%	0.5	13.6x	9.4x
Food & Allied	16,316	16,431	-114.78	-0.70%	21	298,538	4.6%	218.3	8.0%	16.0x	4.2x	LHB	62,017	1.8%	7.8	15.3x	3.1x
IT	1,962	1,964	-1.71	-0.09%	11	25,878	0.4%	130.9	4.8%	19.0x	1.6x	ICB	59,147	1.7%	28.4	30.4x	1.3x
Textile	1,099	1,099	+0.09	+0.01%	58	114,108	1.7%	474.2	17.3%	77.6x	0.8x	UNILEVERCL	49,013	1.4%	0.1	66.7x	20.9x
Paper & Printing	4,046	4,078	-32.67	-0.80%	6	18,278	0.3%	24.8	0.9%	NM	0.8x	DUTCHBANGL	41,832	1.2%	0.4	6.7x	0.9x
Tannery	1,947	1,957	-9.51	-0.49%	6	21,697	0.3%	8.1	0.3%	66.4x	1.5x	BXPHARMA	37,607	1.1%	51.8	6.3x	0.8x
Jute	14,621	14,744	-122.33	-0.83%	3	3,219	0.0%	41.9	1.5%	NM	NM	POWERGRID	36,918	1.0%	1.6	NM	0.2x
Ceramics	363	366	-2.72	-0.74%	5	16,298	0.2%	13.4	0.5%	NM	1.0x	PUBALIBANK	31,813	0.9%	4.7	3.3x	0.6x
Miscellaneous	4,151	4,156	-5.07	-0.12%	15	225,391	3.5%	73.0	2.7%	40.7x	1.8x	EBL	31,780	0.9%	6.4	4.9x	0.7x
Corporate Bond**	13,258	13,118	+140.34	+1.07%	16	34,967	0.5%	0.1	0.0%	NM	NM	OLYMPIC	30,891	0.9%	2.4	16.8x	2.8x
Treasury Bond**	511	511	+0.16	+0.03%	234	2,968,634	45.5%	1.8	0.1%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
EMERALDOIL	24.4	+9.9%	9.8	18.8x	NM
METROSPIN	11.5	+9.5%	7.1	NM	1.8x
AOL	15.1	+9.4%	3.5	9.7x	0.8x
ORIONINFU	320.2	+8.7%	168.9	NM	20.0x
LRBDL	13.3	+7.3%	15.1	NM	0.4x
HAMI	85.4	+5.96%	5.5	NM	9.4x
AAMRATECH	18.9	+5.6%	9.0	NM	1x
MITHUNKNIT	14.1	+4.4%	1.2	NM	4.4x
SAFKOSPINN	9.8	+4.3%	0.7	NM	NM
TALLUSPIN	5.0	+4.2%	0.1	NM	0.3x

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%	10.5x	3.0x
RENATA	35,002	2.6%	22.8x	2.1x
ISLAMIBANK	33,649	2.5%	15.7x	1.0x
BXPHARMA	32,479	2.4%	6.3x	0.8x
BRACBANK	32,157	2.4%	7.7x	1.1x
GP	30,004	2.2%	12.0x	7.4x
LHB	24,690	1.8%	15.3x	3.1x
EBL	24,199	1.8%	4.9x	0.7x
PUBALIBANK	20,448	1.5%	3.3x	0.6x
NBL	16,930	1.2%	NM	2.8x
CITYBANK	16,830	1.2%	4.0x	0.7x
BSRMLTD	14,210	1.0%	4.8x	0.5x
ALARABANK	13,534	1.0%	12.6x	0.9x
PRIMEBANK	12,985	1.0%	4.1x	0.7x
OLYMPIC	12,616	0.9%	16.8x	2.8x
UTTARABANK	11,350	0.8%	7.5x	0.7x
ORIONPHARM	11,317	0.8%	44.3x	0.4x
ROBI	10,738	0.8%	24.8x	2.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ORIONINFU	320.2	+8.7%	168.9	NM	20.0x
SAIHAMCOT	16.6	+2.5%	109.5	16.8x	0.4x
LOVELLO	84.6	+1.3%	89.8	46.1x	6.5x
DSSL	12.1	-	75.6	39.0x	0.7x
INTRACO	21.7	+2.4%	63.4	26.1x	1.7x
ORIONPHARM	37.2	+3.6%	62.0	44.3x	0.4x
ASIATICLAB	35.2	-4.1%	59.3	14.9x	0.7x
RELIANCE1	19.6	-	57.5	NM	1.8x
MPETROLEUM	215.0	+0.2%	54.7	4.0x	0.9x
BXPHARMA	84.3	-2.4%	51.8	6.3x	0.8x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
JUTESPINN	245.5	-6.2%	2.2	NM	NM
ILFSL	3.6	-5.3%	0.2	NM	NM
SONARGAON	26.0	-4.8%	15.5	70.3x	1.3x
ASIATICLAB	35.2	-4.1%	59.3	14.9x	0.7x
ZEALBANGLA	100.0	-3.9%	0.4	NM	NM
DULAMIACOT	77.7	-3.8%	1.2	NM	NM
SALVOCHEM	25.9	-3.7%	20.1	24.7x	1.6x
ALLTEX	8.9	-3.3%	2.0	44.5x	0.4x
MLDYEING	9.0	-3.2%	3.9	47.4x	0.7x
NAHEEACP	21.5	-3.2%	6.5	61.4x	1.1x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ORIONINFU	313.0	280.0	30.0	2,259	667.57
FINEFOODS	221.0	195.0	4.0	175	34.24
LOVELLO	91.0	82.0	5.0	256	21.13
PREMIERBAN	10.0	10.0	1.0	660	6.60
BEACHHATCH	89.5	89.2	5.0	60	5.37
RELIANCE1	19.0	18.7	2.0	239	4.54
AIL	88.0	88.0	2.0	46	4.05
ACMELAB	75.8	75.8	3.0	51	3.87
DSSL	12.4	11.0	2.0	260	3.00
SAIFPOWER	13.7	13.7	1.0	190	2.60

* 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
ORIONINFU	313.0	280.0	667.6	2,259	30
FINEFOODS	221.0	195.0	34.2	175	4
LOVELLO	91.0	82.0	21.1	256	5
PREMIERBAN	10.0	10.0	6.6	660	1
BEACHHATCH	89.5	89.2	5.4	60	5
RELIANCE1	19.0	18.7	4.5	239	2
AIL	88.0	88.0	4.0	46	2
ACMELAB	75.8	75.8	3.9	51	3
DSSL	12.4	11.0	3.0	260	2
SAIFPOWER	13.7	13.7	2.6	190	1
GP	320.0	320.0	2.4	8	1
RUPALILIFE	109.1	95.1	2.0	20	2
BSC	76.6	76.6	2.0	26	1
NRRBANK	13.9	13.9	1.9	138	1
SIMTEX	18.3	18.3	1.8	100	1
TECHNODRUG	40.0	40.0	1.8	45	1
MIDLANDBNK	30.5	30.5	1.0	32	1
MIDLANDBNK	30.5	30.5	1.0	32	1
GLDNJMF	9.4	9.4	0.9	100	1
NLTUTUBES	78.5	78.5	0.8	10	1
SIBL	9.9	9.9	0.6	60	1
LHB	53.5	53.5	0.6	11	1
Total			773.2		74

Important DSE News
AOL

The Company has been placed in 'A' category from existing 'Z' category with effect from today i.e., December 12, 2024 as the Company has reported disbursement of 10% Cash Dividend for the year ended June 30, 2022.

JUTESPINN

(Q1 Un-audited): EPS was Tk. (10.63) for July-September 2024 as against Tk. (5.50) for July-September 2023; NOCFPS was Tk. (1.52) for July-September 2024 as against Tk. 1.36 for July-September 2023. NAV per share was Tk. (598.50) as on September 30, 2024 and Tk. (527.69) as on September 30, 2023.

DACCADYE

The Board of Directors has recommended No Dividend for the year ended June 30, 2024. Date of AGM: 30.01.2025, Time: 11.00 AM, Venue: Factory Premises at Pagar, Tongi, Gazipur. Record date: 07.01.2025. The Company has also reported EPS of Tk. (2.58), NAV per share of Tk. 31.51 and NOCFPS of Tk. 1.47 for the year ended June 30, 2024 as against Tk. (0.58), Tk. 34.08 and Tk. 1.69 respectively for the year ended June 30, 2023. (cont.)

IFADAUTOS

Refer to their earlier news disseminated by DSE on 17.11.2024 regarding Stock Dividend, the company has further informed that the Bangladesh Securities and Exchange Commission (BSEC) has given their consent regarding declared 1% Stock Dividend of the company for the year ended June 30, 2024. The record date for entitlement of 1% Stock Dividend will be December 22, 2024.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
MAKSONSPIN		0.0%	0%	Record Date	29-Dec-24
DACCADYE		0.0%	0%	Record Date	7-Jan-25
TOSRIFA		2.0%	0%	Record Date	ll be notified lat

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