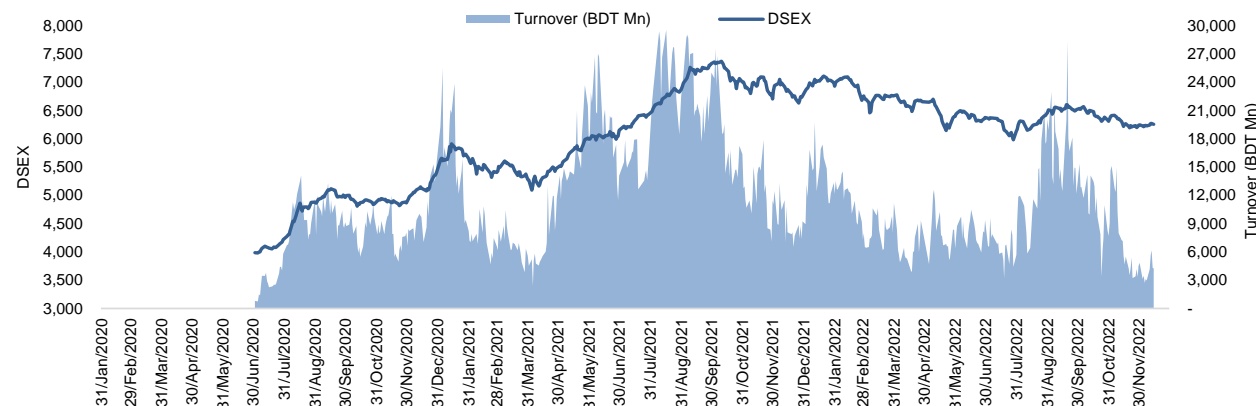


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.06%) lost 3.94 points and closed at 6,256.83. The blue-chip index DS30 (-0.02%), the Shariah-based index DSES (+0.04%), and the large-cap index CDSET (-0.02%) closed at 2,208.48, 1,372.96, and 1,220.35 points, respectively. Large-cap sectors posted mixed performance today. Food & Allied booked the highest gain of 0.10% followed by Bank (+0.02%), Engineering (+0.01%). Pharmaceutical experienced the highest loss of 0.23% followed by Fuel & Power (-0.07%), NBF1 (-0.03%). Block trades contributed 4.0% of the overall market turnover. Salvo Chemical Industry Limited (-6.2%) was the most traded share with a turnover of BDT 341 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,256.83	6,260.77	-3.94	-0.06%	-7.4%
DS30	2,208.48	2,208.96	-0.49	-0.02%	-12.8%
DSES	1,372.96	1,372.43	+0.54	+0.04%	-4.1%
CDSET	1,220.35	1,220.54	-0.19	-0.02%	-10.2%

	Advanced	Declined	Unchanged	Total
All Category	36	57	235	328
A Category (Equity)	31	38	163	232
B Category (Equity)	5	12	57	74
N Category (Equity)	0	5	4	9
Z Category (Equity)	0	2	11	13
Mutual Funds	0	1	25	26
Corporate Bonds	1	0	2	3
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,637,279	7,641,605	-0.1%
	Mn USD	74,390	74,432	
Turnover	Mn BDT	4,253	4,302	-1.1%
	Mn USD	41	42	
Volume	Mn Shares	54	68	-19.3%
	No. of Trade	85,378	97,120	-12.1%

* Average Interbank Exchange Rate is BDT 102.67 as of Dec 14, 2022

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Figure: Sectorial Turnover (BDT)

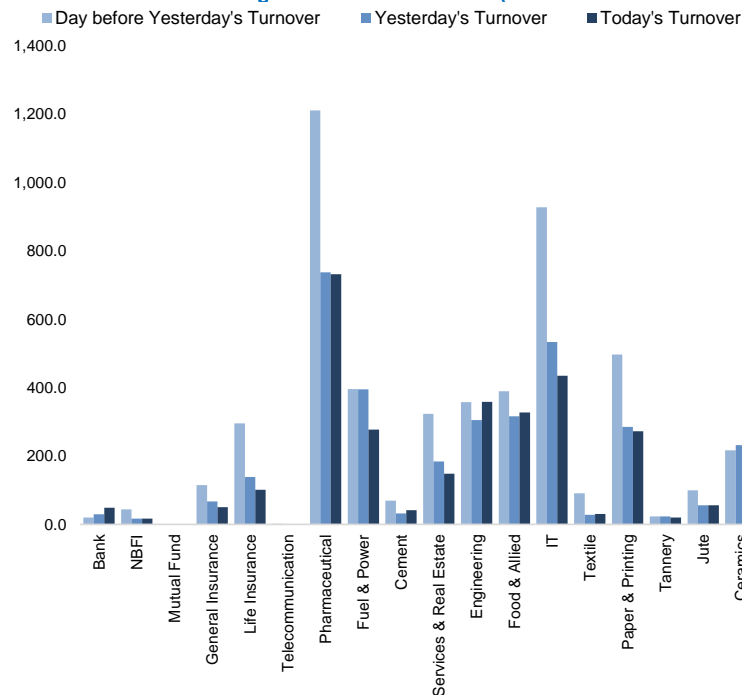
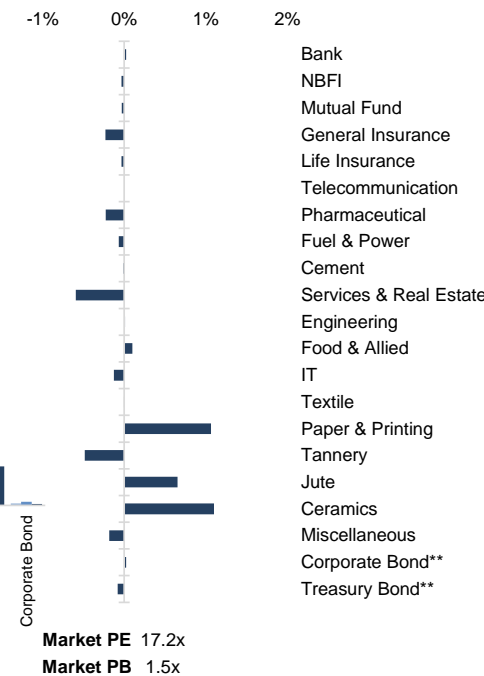


Figure: Sectorial Mcap Change



Market PE 17.2x

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	+0.35	+0.02%	34	667,614	8.7%	48.7	1.5%	7.7x	0.7x	GP	386,996	8.6%	0.9	11.2x	9.1x
NBFI	1,921	1,922	-0.60	-0.03%	23	187,441	2.5%	17.3	0.5%	NM	4.5x	WALTONHIL	317,378	7.1%	7.0	35.7x	3.3x
Mutual Fund	854	854	-0.24	-0.03%	37	38,610	0.5%	1.2	0.0%	NM	0.8x	BATBC	280,098	6.2%	0.9	16.8x	6.7x
General Insurance	3,190	3,197	-7.28	-0.23%	42	93,020	1.2%	50.3	1.5%	15.6x	1.5x	SQURPHARMA	185,977	4.1%	1.4	10.0x	1.7x
Life Insurance	2,489	2,490	-0.81	-0.03%	14	69,795	0.9%	101.4	3.0%	NM	NM	ROBI	157,138	3.5%	0.0	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	1.2	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.1	28.1x	4.6x
Pharmaceutical	3,811	3,820	-8.65	-0.23%	33	730,245	9.6%	731.7	21.8%	18.8x	2.4x	UPGDCL	135,475	3.0%	0.0	13.6x	3.8x
Fuel & Power	1,700	1,701	-1.13	-0.07%	23	448,210	5.9%	277.0	8.3%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.1	8.2x	1.2x
Cement	2,321	2,321	-0.19	-0.01%	7	111,457	1.5%	41.9	1.3%	33.5x	2.5x	BERGERPBL	79,399	1.8%	0.5	25.8x	6.9x
Services & Real Estate	1,761	1,771	-10.49	-0.59%	8	69,568	0.9%	147.9	4.4%	39.4x	0.9x	MARICO	76,277	1.7%	0.1	21.3x	44.9x
Engineering	4,507	4,507	+0.49	+0.01%	42	529,124	6.9%	358.8	10.7%	35.4x	1.8x	ICB	74,119	1.6%	0.0	68.1x	1.6x
Food & Allied	21,348	21,326	+21.40	+0.10%	21	380,388	5.0%	327.4	9.8%	21.6x	7.4x	BEACONPHAR	68,954	1.5%	10.2	84.8x	11.2x
IT	3,146	3,150	-3.96	-0.13%	11	41,014	0.5%	434.7	13.0%	29.2x	2.8x	BXPBARMA	66,337	1.5%	37.0	13.0x	1.6x
Textile	1,634	1,634	-0.06	-0.00%	58	171,849	2.2%	30.1	0.9%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	10,754	10,640	+113.24	+1.06%	6	41,433	0.5%	272.6	8.1%	46.6x	2.1x	ISLAMIBANK	52,969	1.2%	19.9	10.8x	0.8x
Tannery	3,090	3,105	-15.03	-0.48%	6	33,276	0.4%	20.2	0.6%	40.4x	3.1x	DUTCHBANGL	43,554	1.0%	0.1	7.4x	1.1x
Jute	16,156	16,051	+105.05	+0.65%	3	3,952	0.1%	56.1	1.7%	NM	139.4x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	718	710	+7.83	+1.10%	5	33,217	0.4%	314.7	9.4%	34.7x	2.0x	POWERGRID	37,347	0.8%	0.0	38.5x	0.4x
Miscellaneous	4,079	4,086	-7.48	-0.18%	15	228,796	3.0%	113.8	3.4%	12.5x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.0x	0.9x
Corporate Bond**	91	91	+0.02	+0.02%	9	37,580	0.5%	3.9	0.1%	NM	NM	BSCCL	36,098	0.8%	0.2	14.9x	3.4x
Treasury Bond**	98	98	-0.08	-0.08%	252	3,143,435	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
MONNOCERA	138.3	+7.5%	311.3	NM	1.7x	SQURPHARMA	121,685	7.2%	10.0x	1.7x	SALVOCHEM	61.8	-6.2%	340.9	87.0x	4.1x
MONOSPOOL	332.2	+6.2%	75.1	49.6x	7.2x	BATBC	74,086	4.4%	16.8x	6.7x	MONNOCERA	138.3	+7.5%	311.3	NM	1.7x
APEXFOODS	309.7	+5.7%	71.6	47.9x	2.4x	BEXIMCO	70,355	4.2%	8.2x	1.2x	INTRACO	45.6	-1.3%	214.9	36.9x	3.6x
HAKKANIPUL	61.7	+5.1%	18.8	NM	2.7x	RENATA	68,196	4.0%	28.1x	4.6x	AAMRANET	57.4	+2.5%	149.4	25.1x	1.6x
KAY&QUE	303.7	+5.0%	34.7	NM	4.1x	BEACONPHAR	48,267	2.8%	84.8x	11.2x	ORIONPHARM	86.3	-0.6%	129.3	21.4x	0.9x
NORTHERN	267.3	+4.5%	20.0	NM	3.3x	BXPBARMA	46,316	2.7%	13.0x	1.6x	GEMINISEA	423.8	+2.6%	125.2	30.9x	23.0x
ANWARGALV	233.5	+4.0%	41.6	53.3x	20x	GP	38,700	2.3%	11.2x	9.1x	KDSALTD	77.0	-7.1%	121.2	31.0x	2.9x
PAPERPROC	229.0	+4.0%	55.8	48.6x	7.1x	BRACBANK	30,976	1.8%	10.9x	1.0x	BPML	79.6	+0.8%	121.0	21.3x	1.1x
KOHINOOR	515.4	+3.6%	21.9	47.5x	9.4x	LHBL	26,581	1.6%	18.4x	4.1x	MONNOAGML	836.8	+3.1%	100.8	NM	4.8x
BDLAMPS	262.0	+3.1%	15.4	30.2x	2.9x	ISLAMIBANK	23,794	1.4%	10.8x	0.8x	GENEXIL	88.8	-0.9%	93.8	25.7x	4.9x

Top Ten Losers	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	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ORIONINFU	720.3	-7.5%	27.7	NM	48.7x	PUBALIBANK	19,018	1.1%	5.6x	0.7x	RENATA	1,218.0	1,141.8	6.0	332	403.45
KDSALTD	77.0	-7.1%	121.2	31.0x	3x	CITYBANK	17,615	1.0%	4.5x	0.8x	ORIONINFU	837.0	730.0	9.0	175	129.36
SALVOCHEM	61.8	-6.2%	340.9	87.0x	4.1x	ROBI	15,714	0.9%	NM	2.4x	SALVOCHEM	65.5	61.5	11.0	1,405	88.43
JUTESPINN	309.8	-4.0%	6.7	NM	NM	OLYMPIC	15,488	0.9%	20.3x	2.6x	INTRACO	48.1	41.6	17.0	1,440	64.31
LRBDL	36.2	-3.2%	40.1	16.8x	0.9x	ALARABANK	14,609	0.9%	14.6x	1.1x	ANWARGALV	205.0	205.0	3.0	243	49.82
BDTHAIFOOD	52.7	-2.6%	50.9	NM	3.7x	BSRMLTD	14,417	0.9%	62.6x	0.7x	BATBC	500.0	479.8	11.0	29	14.08
BENGALWTL	27.8	-2.1%	11.9	54.5x	1.1x	ORIONPHARM	13,736	0.8%	21.4x	0.9x	KOHINOOR	540.9	540.9	1.0	25	13.52
ADVENT	28.1	-2.1%	61.4	26.3x	1.9x	UPGDCL	13,547	0.8%	13.6x	3.8x	ADNTEL	115.0	115.0	1.0	117	13.46
BSC	117.0	-2.0%	38.7	8.1x	1.5x	SUMITPOWER	13,358	0.8%	10.0x	0.9x	POWERGRID	47.2	47.2	1.0	250	11.80
CENTRALINS	37.2	-1.8%	0.1	16.2x	0.8x						SQURPHARMA	205.1	204.1	13.0	42	8.50

* 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	403.5	332	6	FUWANGCER (Q1 Un-audited): EPS was Tk. 0.06 for July-September 2022 as against Tk. 0.08 for July-September 2021. NOCFPS was Tk. (0.68) for July-September 2022 as against Tk. 0.51 for July-September 2021. NAV per share was Tk. 11.84 as on September 30, 2022 and Tk. 11.78 as on June 30, 2022.
ORIONINFU	837.0	730.0	129.4	175	9	
SALVOCHEM	65.5	61.5	88.4	1,405	11	KDSALTD Khalilur Rahman, one of the Sponsor Directors of the company, has expressed his intention to sell 14,79,961 shares (10,00,000 shares in the Public Market and 4,79,961 shares in the Block Market) out of his holding 3,10,79,198 shares of the Company at prevailing market price through Dhaka Stock Exchange within next 30 working days.
INTRACO	48.1	41.6	64.3	1,440	17	
ANWARGALV	205.0	205.0	49.8	243	3	WALTONHIL Referring to the BSEC letter No. BSEC/SRMIC/160-2020(Part-I)/200 dated May 22, 2022, S. M. Ashraful Alam, one of the Sponsor Directors of the Company, has expressed his intention to sell 1,00,000 shares out of his holding 6,59,16,762 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange within next 30 working days.
BATBC	500.0	479.8	14.1	29	11	
KOHINOOR	540.9	540.9	13.5	25	1	CNW As per un-audited Q3 financial statements, profit after tax was BDT 17.55 million and basic EPS was BDT 0.58 for the 3 (three) months period July-September 2022 as against profit after tax of BDT 15.75 million and basic EPS of BDT 0.52 for the same period of the previous year. However, Post-IPO basic EPS for the 03 (three) months period July-September 2022 would be BDT 0.35. Moreover, Q3 Financials of Islami Commercial Insurance Company Limited): profit after tax was BDT 31.94 million and basic EPS was BDT 1.05 for the 09 (nine) months period January-September 2022 as against profit after tax of BDT 26.27 million and basic EPS of BDT 0.86 for the same period of the previous year. However, Post-IPO EPS would be BDT 0.63 for 09 (nine) months period January-September 2022. Pre-IPO Net Asset Value (NAV) per share (considering Pre-IPO paid up shares) would be BDT 19.69 as on 30 September 2022 and the same would be BDT 15.81 (considering Post-IPO paid up shares). Pre-IPO weighted average number of shares is 30,391,660 as on 30 September 2022, whereas Post-IPO paid-up number of shares would be 50,652,766 as on the same date.
ADNTEL	115.0	115.0	13.5	117	1	
POWERGRID	47.2	47.2	11.8	250	1	STYLECRAFT The Company will be placed in 'B' category from existing 'A' category with effect from December 18, 2022 as the Company has approved 2% cash dividend for the year ended June 30, 2022.
SQURPHARMA	205.1	204.1	8.5	42	13	
DOMINAGE	19.7	19.7	7.9	400	2	UNIONINS The Company will be placed in 'B' category from existing 'N' category with effect from December 18, 2022 as the Company has reported disbursement of 5% cash dividend for the year ended December 31, 2021.
SOUTHEASTB	13.8	13.8	6.9	500	7	
AAMRATECH	38.7	38.5	6.8	176	4	
YPL	21.1	21.1	6.8	321	1	
PTL	75.0	75.0	6.7	89	1	
EHL	89.0	89.0	4.8	54	1	
GEMINISEA	427.0	421.0	4.2	10	2	
GENEXIL	98.3	98.3	3.9	40	1	
BEXIMCO	104.1	104.1	3.4	33	6	
BEACHHATCH	41.8	39.0	3.1	78	4	
MONNOCERA	131.9	127.0	2.9	23	5	
BSCCL	215.5	201.3	2.8	14	3	
Total			901.7		170	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
Coppertech Industries Limited	-	4.0%	0.0%	Record Date	21-Dec-22
Fortune Shoes Limited	-	5.0%	0.0%	Record Date	21-Dec-22
Beach Hatchery Ltd.	-	0.0%	1.5%	Record Date	22-Dec-22
Yeakin Polymer Limited	-	0.0%	0.0%	Record Date	28-Dec-22
Wata Chemicals Limited	-	0.0%	20.0%	Record Date	29-Dec-22

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