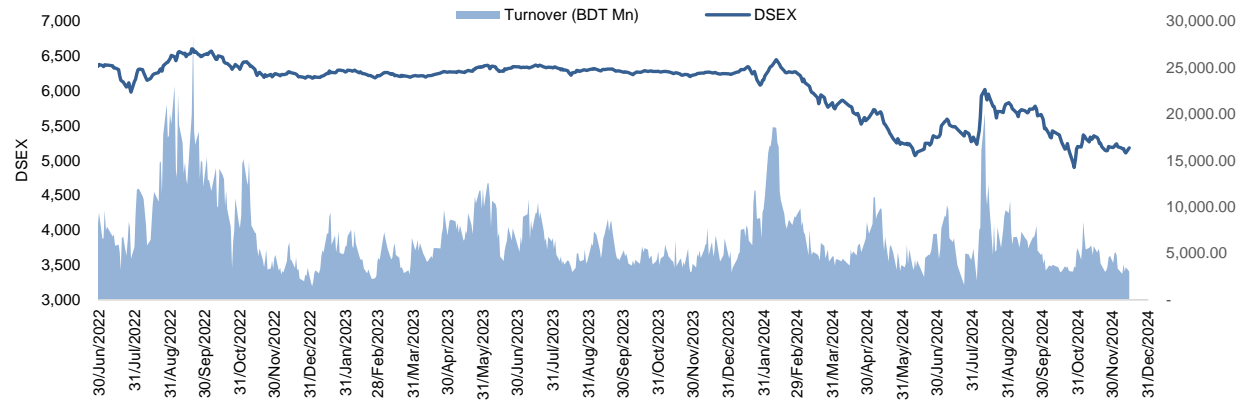


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.44%) gained 73.44 points and closed at 5,178.87. The blue-chip index DS30 (+1.40%), the Shariah-based index DSES (+1.09%), and the large-cap index CDSET (+1.79%) closed at 1,908.32, 1,152.45, and 1,061.10 points, respectively. Most of the large-cap sectors posted positive performance today. Pharmaceutical booked the highest gain of 2.67% followed by NBF1 (+1.15%), Food & Allied (+1.13%), Fuel & Power (+1.06%), Bank (+0.87%), Engineering (+0.44%), and Telecommunication (+0.31%), respectively. Block trades contributed 5.4% of the overall market turnover. Square Pharmaceuticals Ltd. (+4.9%) was the most traded share with a turnover of BDT 349 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,178.87	5,105.43	+73.44	+1.44%	-17.1%
DS30	1,908.32	1,881.90	+26.42	+1.40%	-8.9%
DSES	1,152.45	1,140.05	+12.40	+1.09%	-15.5%
CDSET	1,061.10	1,042.43	+18.67	+1.79%	-11.8%

	Advanced	Declined	Unchanged	Total
All Category	232	89	69	390
A Category (Equity)	153	41	33	227
B Category (Equity)	40	27	10	77
N Category (Equity)	3	1	0	4
Z Category (Equity)	36	20	26	82
Mutual Funds	26	2	9	37
Corporate Bonds	2	0	0	2
Treasury Bonds	0	0	0	0

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,560,076	6,524,964	+0.5%
	Mn USD	54,667	54,375	
Turnover	Mn BDT	3,041	3,516	-13.5%
	Mn USD	25	29	
Volume	Mn Shares	103	113	-9.4%
No. of Trade		100,962	102,838	-1.8%

\* Average Interbank Exchange Rate is BDT 120.00 as of Dec 15, 2024

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Figure: Sectorial Turnover (BDT Mn)

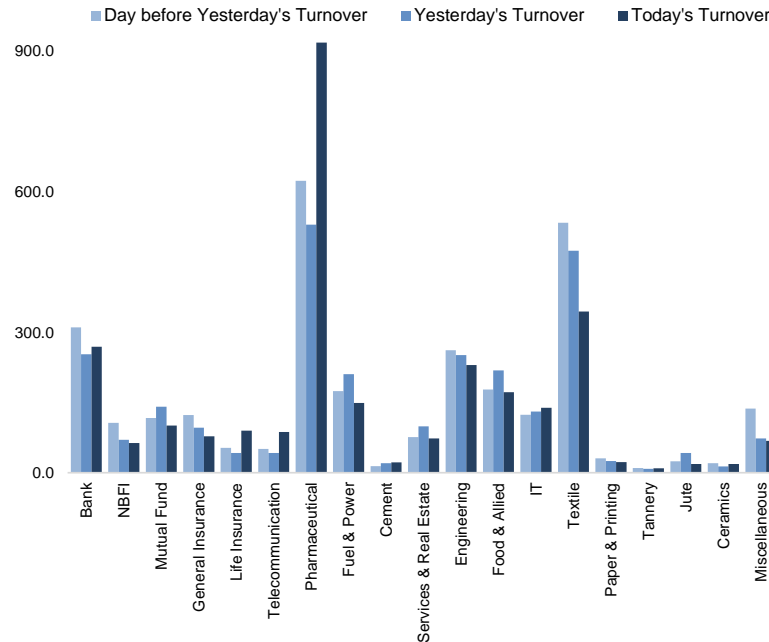
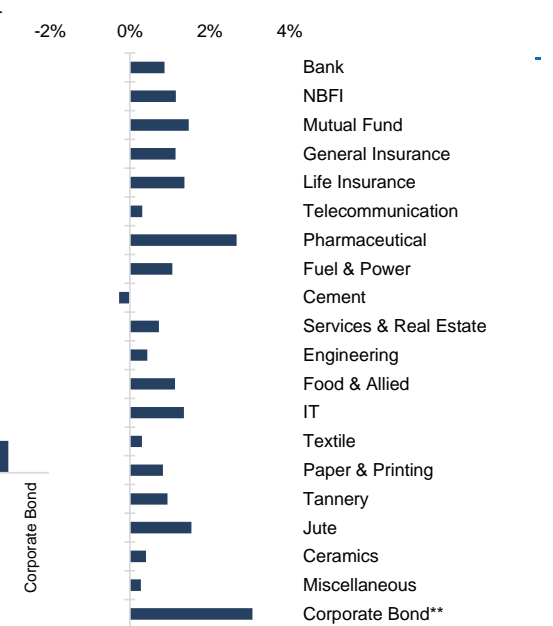


Figure: Sectorial Mcap Change



Market PE 14.6x  
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	1,419	1,406	+12.19	+0.87%	36	671,208	10.2%	269.2	9.4%	8.7x	0.7x	GP	424,399	11.9%	58.0	12.0x	7.3x
NBFI	1,272	1,258	+14.51	+1.15%	23	121,219	1.8%	63.7	2.2%	NM	NM	SQURPHARMA	197,590	5.5%	349.3	9.4x	1.5x
Mutual Fund	607	598	+8.82	+1.47%	37	27,912	0.4%	100.9	3.5%	NM	0.5x	BATBC	186,678	5.2%	15.4	10.6x	3.0x
General Insurance	2,763	2,732	+31.29	+1.15%	43	78,885	1.2%	77.9	2.7%	14.3x	1.2x	WALTONHIL	146,072	4.1%	2.9	11.2x	1.3x
Life Insurance	1,858	1,833	+25.05	+1.37%	15	49,407	0.8%	90.0	3.1%	NM	NM	ROBI	138,281	3.9%	22.5	25.1x	2.1x
Telecommunication	4,984	4,968	+15.53	+0.31%	3	584,359	8.9%	86.9	3.0%	13.8x	4.1x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,975	2,898	+77.44	+2.67%	34	564,052	8.6%	918.7	32.0%	14.4x	1.6x	BRACBANK	86,008	2.4%	29.0	7.8x	1.1x
Fuel & Power	1,132	1,120	+11.93	+1.06%	23	299,693	4.6%	149.0	5.2%	14.3x	0.6x	BERGERPBL	82,701	2.3%	3.2	24.8x	5.2x
Cement	1,955	1,961	-5.28	-0.27%	7	93,179	1.4%	22.1	0.8%	15.7x	2.0x	ISLAMIBANK	76,797	2.1%	32.0	16.4x	1.1x
Services & Real Estate	1,021	1,014	+7.34	+0.72%	9	56,165	0.9%	73.0	2.5%	18.7x	0.4x	UPGDCL	74,723	2.1%	1.8	7.2x	1.9x
Engineering	2,491	2,480	+10.93	+0.44%	42	281,013	4.3%	230.2	8.0%	12.3x	0.9x	MARICO	71,839	2.0%	1.9	13.6x	9.4x
Food & Allied	16,500	16,316	+184.18	+1.13%	21	301,908	4.6%	172.0	6.0%	16.2x	4.3x	LHB	61,901	1.7%	7.2	15.3x	3.1x
IT	1,989	1,962	+26.57	+1.35%	11	26,228	0.4%	138.8	4.8%	19.3x	1.7x	ICB	59,754	1.7%	25.7	30.7x	1.3x
Textile	1,103	1,099	+3.35	+0.31%	58	114,456	1.7%	344.4	12.0%	87.0x	0.8x	UNILEVERCL	49,240	1.4%	0.2	67.0x	21.0x
Paper & Printing	4,079	4,046	+33.64	+0.83%	6	18,430	0.3%	22.8	0.8%	NM	0.8x	DUTCHBANGL	42,008	1.2%	0.8	6.7x	0.9x
Tannery	1,966	1,947	+18.34	+0.94%	6	21,901	0.3%	9.3	0.3%	67.0x	1.5x	BXPHARMA	37,563	1.1%	35.9	6.3x	0.8x
Jute	14,847	14,621	+225.44	+1.54%	3	3,268	0.0%	18.6	0.6%	NM	NM	POWERGRID	36,918	1.0%	2.8	NM	0.2x
Ceramics	365	363	+1.46	+0.40%	5	16,364	0.2%	18.9	0.7%	NM	1.0x	EBL	31,916	0.9%	9.9	4.9x	0.7x
Miscellaneous	4,162	4,151	+11.47	+0.28%	15	226,014	3.4%	68.3	2.4%	40.9x	1.8x	PUBALIBANK	31,813	0.9%	3.4	3.3x	0.6x
Corporate Bond**	13,665	13,258	+406.81	+3.07%	16	35,714	0.5%	0.5	0.0%	NM	NM	OLYMPIC	31,450	0.9%	4.5	17.1x	2.8x
Treasury Bond**	511	511	-0.17	-0.03%	234	2,967,675	45.2%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
HAMI	93.9	+10.0%	9.2	NM	10.3x
AOL	16.6	+9.9%	5.8	10.6x	0.9x
CAPMIBBLMF	9.0	+9.8%	5.2	NM	1.0x
ALLTEX	9.7	+9.0%	1.0	48.5x	0.5x
ACMELAB	77.4	+8.9%	154.8	7.0x	0.6x
SONARGAON	28.3	+8.85%	31.4	76.5x	1.5x
ORIONINFU	348.2	+8.7%	52.1	NM	22x
BEACONPHAR	127.8	+8.2%	31.8	57.6x	4.6x
RENWICKJA	626.0	+7.4%	0.0	NM	NM
OIMEX	25.9	+6.1%	82.2	26.1x	7.5x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
DSSL	11.6	-4.1%	49.9	37.4x	0.6x
WATACHEM	113.9	-4.1%	0.2	NM	2x
HRTEX	33.3	-4.0%	8.2	NM	0.9x
FAMILYTEX	2.6	-3.7%	0.9	NM	0.2x
EXIM1STMF	3.3	-2.9%	0.4	NM	0.4x
AL-HAJTEX	118.9	-2.9%	6.5	NM	13.1x
ILFSL	3.5	-2.8%	0.5	NM	NM
PROGRESLIF	35.6	-2.7%	0.0	NM	NM
BBSCABLES	17.9	-2.7%	3.8	NM	0.6x
NORTHNRINS	28.9	-2.7%	0.4	15.7x	1.2x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.4x	1.5x
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%	16.4x	1.1x
BXPHARMA	32,479	2.4%	6.3x	0.8x
BRACBANK	32,157	2.4%	7.8x	1.1x
GP	30,004	2.2%	12.0x	7.3x
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	2.9x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	4.8x	0.5x
ALARABANK	13,534	1.0%	13.0x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	17.1x	2.8x
UTTARABANK	11,350	0.8%	7.4x	0.7x
ORIONPHARM	11,317	0.8%	45.5x	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
SQURPHARMA	222.9	+4.9%	349.3	9.4x	1.5x
ACMELAB	77.4	+8.9%	154.8	7.0x	0.6x
OIMEX	25.9	+6.1%	82.2	26.1x	7.5x
ASIATICLAB	35.7	+1.4%	77.1	15.2x	0.7x
NRBBANK	13.0	+2.4%	69.6	21.4x	1.0x
INTRACO	21.7	-	59.4	26.1x	1.7x
GP	314.3	-0.1%	58.0	12.0x	7.3x
AGNISYSL	24.9	+3.3%	57.6	20.9x	1.5x
FINEFOODS	209.9	+5.8%	55.1	NM	17.6x
ORIONINFU	348.2	+8.7%	52.1	NM	21.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ORIONINFU	335.0	301.8	15.0	228	70.05
EIL	53.5	51.0	7.0	753	39.63
RENATA	682.1	682.1	4.0	20	13.39
LOVELLO	83.0	82.0	4.0	100	8.20
DACCADYE	13.3	13.3	1.0	490	6.52
FINEFOODS	200.5	200.5	2.0	29	5.81
RUPALILIFE	105.0	105.0	1.0	46	4.80
RELIANCE1	18.8	18.5	3.0	200	3.72
MONOSPOOL	125.0	125.0	2.0	23	2.88
PEOPLESINS	32.2	32.2	4.0	85	2.74

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ORIONINFU	335.0	301.8	70.0	228	15
EIL	53.5	51.0	39.6	753	7
RENATA	682.1	682.1	13.4	20	4
LOVELLO	83.0	82.0	8.2	100	4
DACCADYE	13.3	13.3	6.5	490	1
FINEFOODS	200.5	200.5	5.8	29	2
RUPALILIFE	105.0	105.0	4.8	46	1
RELIANCE1	18.8	18.5	3.7	200	3
MONOSPOOL	125.0	125.0	2.9	23	2
PEOPLESINS	32.2	32.2	2.7	85	4
SUNLIFEINS	63.5	56.5	2.5	41	3
JAMUNABANK	20.7	20.7	0.9	42	1
ORIONPHARM	34.7	34.7	0.7	20	1
GRAMEENS2	14.3	14.3	0.6	45	1
AFTABAUTO	32.1	32.1	0.6	20	1
AL-HAJTEX	116.0	116.0	0.6	5	1
RUPALIBANK	20.7	20.7	0.5	25	1
RUPALIBANK	20.7	20.7	0.5	25	1
NAHEEACP	22.3	22.3	0.5	23	1
SAIHAMCOT	16.8	16.8	0.5	30	1
<b>Total</b>			<b>165.7</b>		<b>55</b>

**Important DSE News**
**MAKSONSPIN**

(Q1 Un-audited): EPS was Tk. (1.71) for July-September 2024 as against Tk. (1.06) for July-September 2023; NOCFPS was Tk. (3.51) for July-September 2024 as against Tk. (0.74) for July-September 2023. NAV per share was Tk. 10.62 as on September 30, 2024 and Tk. 12.29 as on June 30, 2024.

**BDTHAI**

(Q1 Un-audited): EPS was Tk. (0.28) for July-September 2024 as against Tk. (0.19) for July-September 2023; NOCFPS was Tk. (0.36) for July-September 2024 as against Tk. (0.58) for July-September 2023. NAV per share was Tk. 29.29 as on September 30, 2024 and Tk. 30.56 as on June 30, 2024.

**PAPERPROC**

Mr. Mustafa Kamal Mohiuddin, a Sponsor Director of the company, has expressed his intention to transfer 650,000 shares of the company to his son Mr. Mostafa Azad Mohiuddin and 650,000 shares of the company to his spouse Ms. Dilara Mostafa (both are General Shareholder of the company), by way of gift outside the trading system of the Exchange within next thirty working days with effect from December 12, 2024.

Mr. Mostafa Jamal Mohiuddin, a Sponsor Director of the company, has expressed his intention to transfer 295,000 shares of the company to his spouse Ms. Afroza Begum (General Shareholder of the company), by way of gift outside the trading system of the Exchange within next thirty working days with effect from December 12, 2024.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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

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