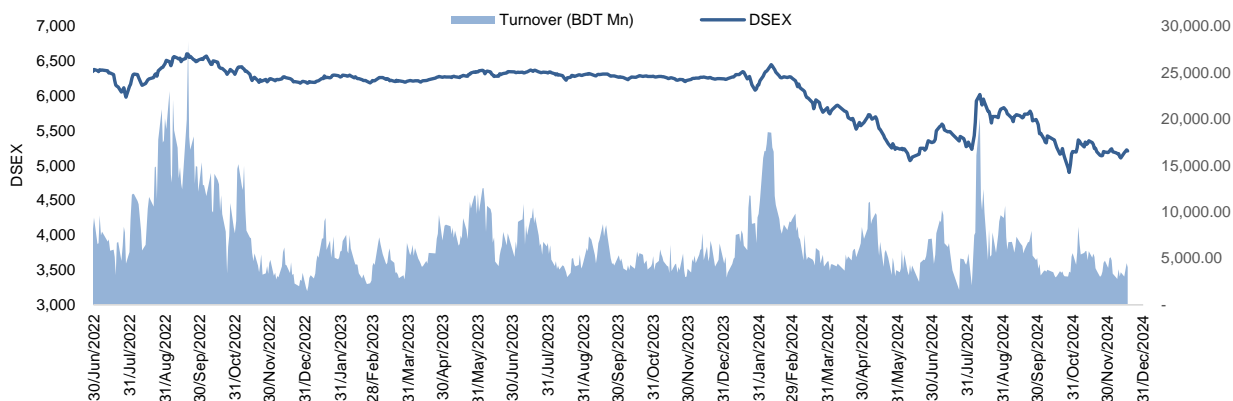


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.31%) lost 16.38 points and closed at 5,208.21. The blue-chip index DS30 (+0.03%), the Shariah-based index DSES (-0.33%), and the large-cap index CDSET (-0.14%) closed at 1,930.06, 1,162.94, and 1,066.85 points, respectively. Most of the large-cap sectors posted negative performance today. NBFi experienced the highest loss of 2.80% followed by Bank (-0.66%), Engineering (-0.43%), Food & Allied (-0.34%), Pharmaceutical (-0.21%), Fuel & Power (-0.15%), and Telecommunication (+1.96%), respectively. Block trades contributed 2.5% of the overall market turnover. Robi Axiata Limited (+4.5%) was the most traded share with a turnover of BDT 236 million.



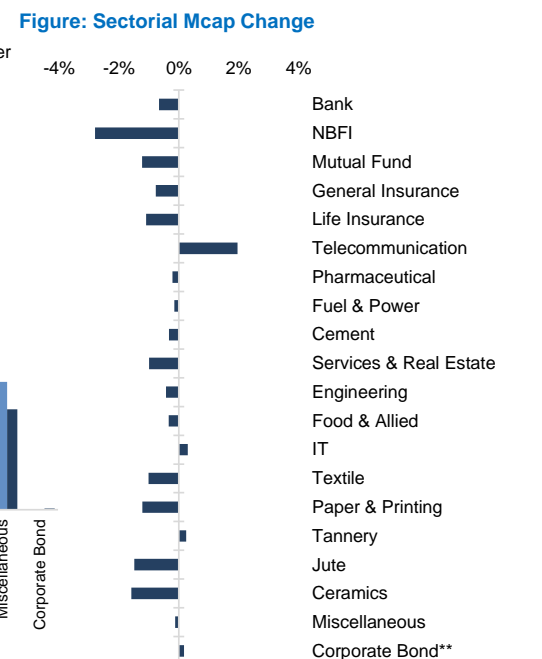
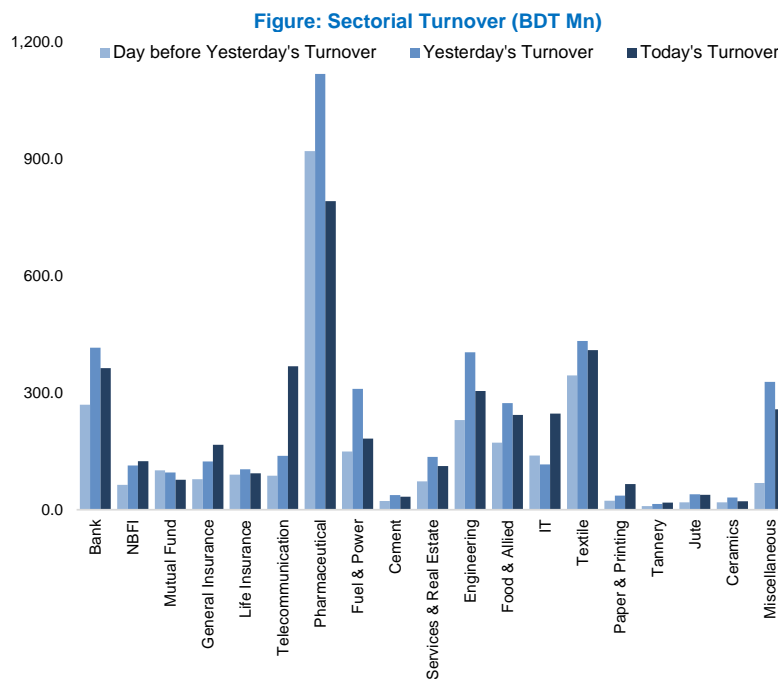
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,208.21	5,224.58	-16.38	-0.31%	-16.6%
DS30	1,930.06	1,929.50	+0.56	+0.03%	-7.8%
DSES	1,162.94	1,166.74	-3.80	-0.33%	-14.7%
CDSET	1,066.85	1,068.39	-1.54	-0.14%	-11.3%

	Advanced	Declined	Unchanged	Total
All Category	79	258	66	403
A Category (Equity)	45	156	33	234
B Category (Equity)	14	56	11	81
N Category (Equity)	1	4	0	5
Z Category (Equity)	19	42	22	83
Mutual Funds	2	22	13	37
Corporate Bonds	1	2	1	4
Treasury Bonds	0	4	0	4

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,595,893	6,596,501	-0.0%
	Mn USD	54,966	54,971	
Turnover	Mn BDT	4,024	4,502	-10.6%
	Mn USD	34	38	
Volume	Mn Shares	135	147	-8.3%
	No. of Trade	132,579	134,851	-1.7%

* Average Interbank Exchange Rate is BDT 120.00 as of Dec 18, 2024

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Market PE 14.8x
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	1,435	-9.44	-0.66%	36	674,348	10.2%	362.6	9.2%	8.7x	0.7x	GP	437,767	12.1%	117.4	12.4x	7.6x
NBFI	1,238	1,274	-35.68	-2.80%	23	118,013	1.8%	124.3	3.2%	NM	NM	SQURPHARMA	197,324	5.5%	155.8	9.4x	1.5x
Mutual Fund	599	607	-7.46	-1.23%	37	27,544	0.4%	76.8	2.0%	NM	0.5x	BATBC	186,246	5.2%	45.5	10.6x	3.0x
General Insurance	2,761	2,782	-21.46	-0.77%	43	78,808	1.2%	166.2	4.2%	14.3x	1.2x	WALTONHIL	147,284	4.1%	2.8	11.3x	1.3x
Life Insurance	1,857	1,877	-20.43	-1.09%	15	49,378	0.7%	93.4	2.4%	NM	NM	ROBI	145,615	4.0%	236.1	26.5x	2.2x
Telecommunication	5,167	5,068	+99.26	+1.96%	3	605,883	9.2%	367.9	9.4%	14.3x	4.3x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	2,992	2,999	-6.44	-0.21%	34	567,245	8.6%	790.8	20.2%	14.4x	1.6x	BRACBANK	86,185	2.4%	27.7	7.8x	1.1x
Fuel & Power	1,131	1,133	-1.70	-0.15%	23	299,651	4.5%	182.2	4.6%	14.3x	0.6x	BERGERPBL	83,911	2.3%	0.6	25.2x	5.3x
Cement	1,976	1,983	-6.59	-0.33%	7	94,186	1.4%	33.5	0.9%	15.8x	2.0x	ISLAMIBANK	77,119	2.1%	40.6	16.5x	1.1x
Services & Real Estate	1,027	1,037	-10.28	-0.99%	9	56,464	0.9%	112.0	2.9%	18.8x	0.4x	RENATA	75,447	2.1%	8.5	23.6x	2.2x
Engineering	2,503	2,513	-10.79	-0.43%	42	282,304	4.3%	304.2	7.8%	12.4x	0.9x	MARICO	72,356	2.0%	0.6	13.7x	9.5x
Food & Allied	16,460	16,517	-56.16	-0.34%	21	301,180	4.6%	243.1	6.2%	16.1x	4.3x	LHB	62,366	1.7%	12.0	15.4x	3.1x
IT	2,005	1,998	+6.05	+0.30%	11	26,439	0.4%	246.5	6.3%	19.4x	1.7x	ICB	56,805	1.6%	72.2	29.2x	1.3x
Textile	1,096	1,107	-11.17	-1.01%	58	114,154	1.7%	409.3	10.4%	88.7x	0.8x	UNILEVERCL	49,194	1.4%	0.0	66.9x	20.9x
Paper & Printing	4,109	4,160	-50.54	-1.22%	6	18,564	0.3%	65.6	1.7%	NM	0.8x	DUTCHBANGL	42,008	1.2%	1.6	6.7x	0.9x
Tannery	1,978	1,973	+4.82	+0.24%	6	22,042	0.3%	18.2	0.5%	67.4x	1.5x	POWERGRID	38,654	1.1%	14.0	NM	0.2x
Jute	14,986	15,211	-225.52	-1.48%	3	3,299	0.1%	38.3	1.0%	NM	NM	BXPHARMA	37,920	1.1%	80.5	6.3x	0.8x
Ceramics	363	369	-5.86	-1.59%	5	16,299	0.2%	21.5	0.5%	NM	1.0x	PUBALIBANK	33,432	0.9%	13.7	3.5x	0.6x
Miscellaneous	4,213	4,218	-4.95	-0.12%	15	228,785	3.5%	257.1	6.6%	41.4x	1.8x	EBL	32,324	0.9%	25.0	4.9x	0.7x
Corporate Bond**	13,519	13,496	+23.12	+0.17%	16	34,702	0.5%	2.8	0.1%	NM	NM	OLYMPIC	31,230	0.9%	13.5	17.0x	2.8x
Treasury Bond**	512	512	+0.69	+0.13%	234	2,976,135	45.1%	7.0	0.2%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MITHUNKNIT	15.6	+9.9%	6.6	NM	4.9x
ANWARGALV	71.4	+7.9%	27.5	96.5x	7.8x
STANCERAM	70.7	+6.0%	0.1	NM	NM
POWERGRID	42.3	+4.7%	14.0	NM	0.2x
ROBI	27.8	+4.5%	236.1	26.5x	2.2x
AL-HAJTEX	121.9	+3.92%	10.5	NM	14.4x
DSHGARME	85.8	+3.7%	7.4	NM	5x
ISNLTD	36.4	+3.7%	4.3	NM	12.5x
MIDLANDBNK	31.4	+3.3%	21.4	18.2x	2.2x
PREMIERLEA	3.3	+3.1%	0.0	NM	NM

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.4x	1.5x
BEXIMCO	69,460	5.1%	NM	1.3x
BATBC	45,948	3.4%	10.6x	3.0x
RENATA	35,002	2.6%	23.6x	2.2x
ISLAMIBANK	33,649	2.5%	16.5x	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%	12.4x	7.6x
LHB	24,690	1.8%	15.4x	3.1x
EBL	24,199	1.8%	4.9x	0.7x
PUBALIBANK	20,448	1.5%	3.5x	0.6x
NBL	16,930	1.2%	NM	2.8x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	4.8x	0.5x
ALARABANK	13,534	1.0%	12.9x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	17.0x	2.8x
UTTARABANK	11,350	0.8%	7.5x	0.7x
ORIONPHARM	11,317	0.8%	44.2x	0.4x
ROBI	10,738	0.8%	26.5x	2.2x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ROBI	27.8	+4.5%	236.1	26.5x	2.2x
ACMELAB	79.5	+0.3%	202.7	7.2x	0.7x
BSC	93.1	-0.7%	157.6	4.9x	0.9x
SQURPHARMA	222.6	-0.3%	155.8	9.4x	1.5x
AGNISYSL	25.2	+1.2%	124.4	21.2x	1.5x
GP	324.2	+1.3%	117.4	12.4x	7.6x
DSSL	11.9	-	100.8	38.4x	0.6x
ORIONINFU	374.7	-1.0%	97.1	NM	23.4x
BXPHARMA	85.0	+0.6%	80.5	6.3x	0.8x
FINEFOODS	216.2	-0.0%	77.6	NM	18.1x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SAFKOSPINN	9.4	-8.7%	0.6	NM	NM
KPPL	7.4	-7.5%	3.0	NM	NM
FAMILYTEX	2.6	-7.1%	0.6	NM	0.2x
INDEXAGRO	64.2	-7.1%	1.4	11.7x	0.8x
HRTEX	31.5	-6.5%	6.1	NM	0.9x
NEWLINE	7.3	-6.4%	18.3	14.0x	0.3x
HAMI	97.1	-5.9%	7.0	NM	10.7x
FAREASTFIN	3.3	-5.7%	0.1	NM	NM
AOL	16.9	-5.6%	16.1	10.8x	0.9x
JUTESPINN	255.9	-5.0%	0.8	NM	NM

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACONPHAR	121.0	120.0	2.0	373	44.93
EIL	55.8	55.5	4.0	227	12.64
FINEFOODS	210.0	201.0	6.0	50	10.26
ASIATICLAB	38.4	38.0	3.0	177	6.76
ORIONINFU	347.0	346.9	2.0	14	4.72
AL-HAJTEX	115.0	110.0	4.0	41	4.67
AIL	77.3	77.3	1.0	39	2.98
LOVELLO	81.0	81.0	1.0	30	2.43
DULAMIACOT	78.0	78.0	1.0	30	2.34
SUNLIFEINS	63.1	63.1	1.0	28	1.77

* 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
BEACONPHAR	121.0	120.0	44.9	373	2
EIL	55.8	55.5	12.6	227	4
FINEFOODS	210.0	201.0	10.3	50	6
ASIATICLAB	38.4	38.0	6.8	177	3
ORIONINFU	347.0	346.9	4.7	14	2
AL-HAJTEX	115.0	110.0	4.7	41	4
AIL	77.3	77.3	3.0	39	1
LOVELLO	81.0	81.0	2.4	30	1
DULAMIACOT	78.0	78.0	2.3	30	1
SUNLIFEINS	63.1	63.1	1.8	28	1
RELIANCE1	19.2	19.2	1.4	73	1
EBL	26.0	26.0	1.3	50	1
BDTHAI	10.9	10.9	1.1	100	1
AFTABAUTO	37.5	37.5	0.7	20	1
MIDLANDBNK	28.8	28.8	0.7	25	1
SONALIANS	225.0	225.0	0.7	3	1
1STPRIMFMF	36.8	36.8	0.6	16	1
SIMTEX	18.9	18.9	0.6	30	1
VAMLBDMF1	5.6	5.6	0.6	100	1
Total			101.2		34

Important DSE News
AL-HAJTEX

The Board of Directors has recommended No Dividend for the year ended June 30, 2023. Date of AGM: 30.01.2025, Time: 12:30 PM. Venue: Hybrid Platform, Dhaka Club, Sinha Lounge. Record Date: 08.01.2025. The Company has also reported EPS of Tk. (0.78), NAV per share of Tk. 8.45 and NOCFPS of Tk. (3.23) for the year ended June 30, 2023 as against Tk. 0.91, Tk. 9.52 and Tk. (3.66) respectively for the year ended June 30, 2022.

INTRACO

The Company will be placed in 'B' category from existing 'A' category with effect from December 19, 2024 as the Company has approved 1% Cash Dividend for the year ended June 30, 2024.

RENATA

The company has informed that it has successfully dispatched its first shipment of Rosuvastatin to the U.S. market, manufactured at Renata's US FDA-approved facility in Bangladesh. The company has also informed that Renata's product-better known by its brand name Rolip, has been one of the leading and most trusted brands in the Bangladesh market for Rosuvastatin. Rolip will now be available in the U.S. market as a bioequivalent and interchangeable formulation to the innovator product. Rolip is available in dosage strengths of 5 mg, 10 mg, 20 mg, and 40 mg tablets.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
AL-HAJTEX		0.0%	0%	Record Date	8-Jan-25

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