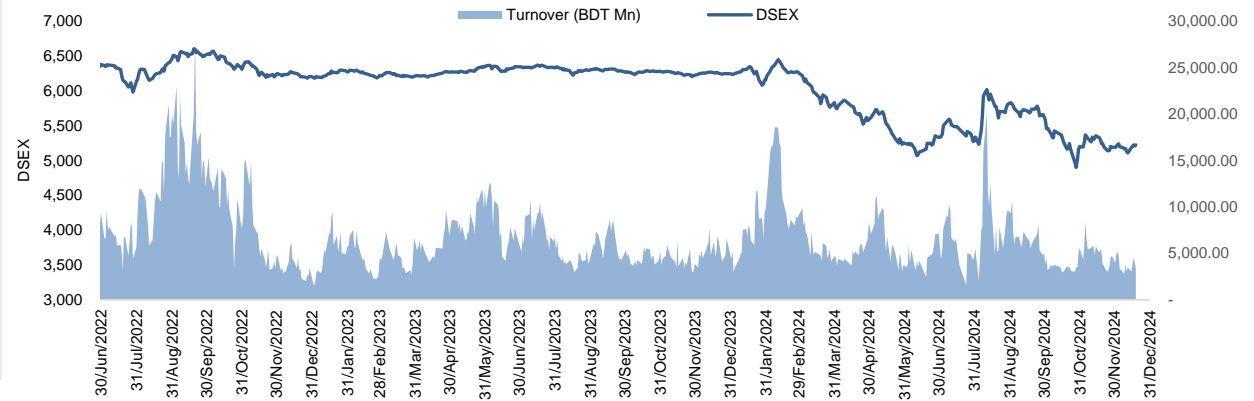


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.26%) gained 13.36 points and closed at 5,221.57. The blue-chip index DS30 (+0.43%), the Shariah-based index DSES (+0.38%), and the large-cap index CDSET (+0.33%) closed at 1,938.30, 1,167.36, and 1,070.39 points, respectively. Most of the large-cap sectors posted positive performance today. Telecommunication booked the highest gain of 0.69% followed by NBF1 (+0.52%), Pharmaceutical (+0.43%), Food & Allied (+0.22%), Bank (+0.11%), Engineering (+0.11%), and Fuel & Power (-0.14%), respectively. Block trades contributed 4.5% of the overall market turnover. Square Pharmaceuticals Ltd. (+0.1%) was the most traded share with a turnover of BDT 218 million.



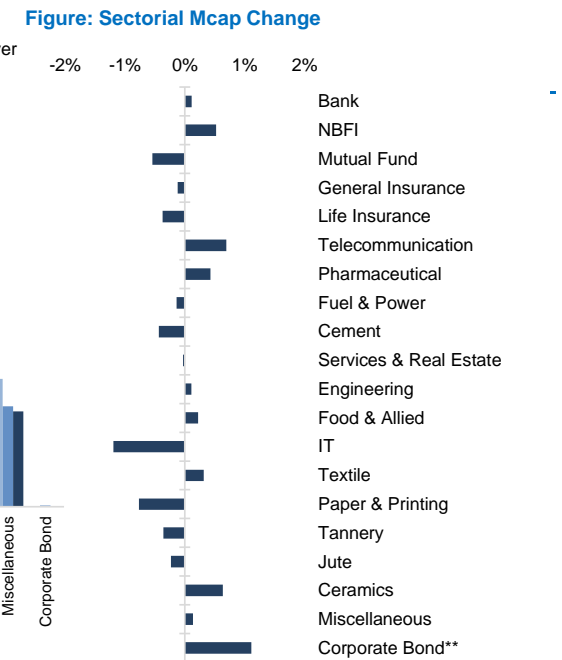
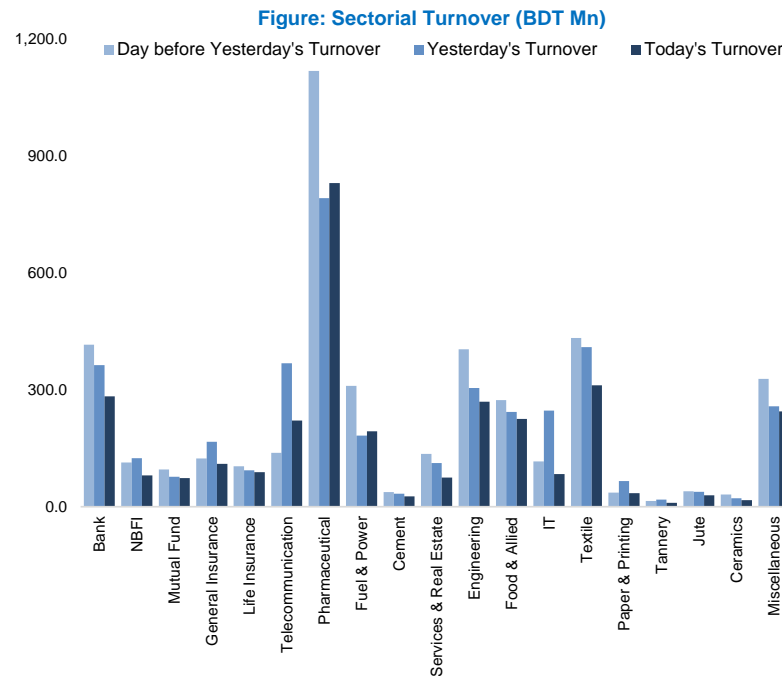
Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,221.57	5,208.21	+13.36	+0.26%	-16.4%
DS30	1,938.30	1,930.06	+8.24	+0.43%	-7.4%
DSES	1,167.36	1,162.94	+4.42	+0.38%	-14.4%
CDSET	1,070.39	1,066.85	+3.54	+0.33%	-11.0%

	Advanced	Declined	Unchanged	Total
<b>All Category</b>	119	201	77	397
<b>A Category (Equity)</b>	65	125	39	229
<b>B Category (Equity)</b>	27	37	17	81
<b>N Category (Equity)</b>	1	2	2	5
<b>Z Category (Equity)</b>	26	37	19	82
<b>Mutual Funds</b>	4	15	18	37
<b>Corporate Bonds</b>	3	0	1	4
<b>Treasury Bonds</b>	0	1	0	1

	Today	Last Day	Daily %Δ
<b>Mcap</b>			
Mn BDT	6,592,055	6,595,893	-0.1%
Mn USD	54,934	54,966	
<b>Turnover</b>			
Mn BDT	3,356	4,024	-16.6%
Mn USD	28	34	
<b>Volume</b>			
Mn Shares	101	135	-24.8%
<b>No. of Trade</b>	110,039	132,579	-17.0%

\* Based on Traded Scrips

<b>Fahim Hassan</b> Research Analyst (891) 1709636546 fahim.hassan@bracepl.com	<b>Md Istiaz Uddin</b> Research Associate (891) 1708805202 mistiaz.uddin@bracepl.com
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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	1,427	1,425	+1.63	+0.11%	36	675,118	10.2%	282.7	8.8%	8.7x	0.7x	GP	439,388	12.2%	102.8	12.4x	7.6x
NBFI	1,245	1,238	+6.46	+0.52%	23	118,628	1.8%	80.3	2.5%	NM	NM	SQURPHARMA	197,501	5.5%	218.0	9.4x	1.5x
Mutual Fund	596	599	-3.26	-0.54%	37	27,395	0.4%	73.5	2.3%	NM	0.5x	BATBC	187,218	5.2%	16.0	10.7x	3.0x
General Insurance	2,757	2,761	-3.23	-0.12%	43	78,715	1.2%	109.9	3.4%	14.2x	1.2x	ROBI	148,234	4.1%	108.5	27.0x	2.3x
Life Insurance	1,850	1,857	-6.90	-0.37%	15	49,195	0.7%	88.5	2.8%	NM	NM	WALTONHIL	148,041	4.1%	2.3	11.4x	1.3x
Telecommunication	5,203	5,167	+35.83	+0.69%	3	610,084	9.3%	221.0	6.9%	14.4x	4.3x	BEXIMCO	103,847	2.9%	0.0	NM	1.3x
Pharmaceutical	3,005	2,992	+12.89	+0.43%	34	569,690	8.6%	829.3	25.9%	14.5x	1.6x	BRACBANK	85,477	2.4%	28.6	7.7x	1.1x
Fuel & Power	1,130	1,131	-1.53	-0.14%	23	299,246	4.5%	193.1	6.0%	14.3x	0.6x	BERGERPBL	83,499	2.3%	1.5	25.1x	5.3x
Cement	1,968	1,976	-8.53	-0.43%	7	93,779	1.4%	26.7	0.8%	15.8x	2.0x	ISLAMIBANK	76,636	2.1%	14.7	16.4x	1.0x
Services & Real Estate	1,026	1,027	-0.30	-0.03%	9	56,448	0.9%	74.6	2.3%	18.8x	0.4x	RENATA	75,103	2.1%	4.5	23.5x	2.2x
Engineering	2,505	2,503	+2.77	+0.11%	42	282,617	4.3%	269.5	8.4%	12.4x	0.9x	MARICO	72,258	2.0%	1.0	13.6x	9.5x
Food & Allied	16,497	16,460	+36.80	+0.22%	21	301,853	4.6%	225.1	7.0%	16.1x	4.3x	LHB	62,250	1.7%	7.8	15.4x	3.1x
IT	1,981	2,005	-23.88	-1.19%	11	26,124	0.4%	83.9	2.6%	19.2x	1.7x	ICB	57,673	1.6%	44.1	29.7x	1.3x
Textile	1,100	1,096	+3.49	+0.32%	58	114,518	1.7%	310.9	9.7%	89.0x	0.8x	UNILEVERCL	48,955	1.4%	0.2	66.6x	20.8x
Paper & Printing	4,078	4,109	-31.45	-0.77%	6	18,422	0.3%	35.0	1.1%	NM	0.8x	DUTCHBANGL	41,744	1.2%	1.4	6.7x	0.8x
Tannery	1,971	1,978	-7.06	-0.36%	6	21,963	0.3%	10.0	0.3%	67.2x	1.5x	POWERGRID	38,289	1.1%	3.9	NM	0.2x
Jute	14,951	14,986	-34.58	-0.23%	3	3,291	0.0%	29.3	0.9%	NM	NM	BXPHARMA	37,920	1.0%	36.6	6.3x	0.8x
Ceramics	366	363	+2.32	+0.64%	5	16,403	0.2%	16.8	0.5%	NM	1.0x	PUBALIBANK	33,664	0.9%	10.0	3.5x	0.6x
Miscellaneous	4,219	4,213	+5.73	+0.14%	15	229,096	3.5%	244.5	7.6%	41.4x	1.8x	EBL	33,274	0.9%	35.7	5.1x	0.8x
Corporate Bond**	13,669	13,519	+149.95	+1.11%	16	34,766	0.5%	0.9	0.0%	NM	NM	BEACONPHAR	31,532	0.9%	58.8	61.5x	4.9x
Treasury Bond**	510	512	-2.05	-0.40%	234	2,964,237	45.0%	0.2	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
INDEXAGRO	69.4	+8.1%	3.5	12.7x	0.8x
SHARPIND	18.9	+6.8%	9.6	52.5x	1.9x
ORIONINFU	397.8	+6.2%	169.4	NM	24.9x
AOL	17.9	+5.9%	25.3	11.5x	0.9x
SHYAMPSUG	116.6	+5.5%	6.9	NM	NM
FARCHEM	19.4	+5.43%	7.2	57.1x	0.6x
BEACONPHAR	136.5	+5.2%	58.8	61.5x	5x
MEGCONMILK	26.0	+4.8%	1.0	NM	NM
SAIHAMCOT	16.5	+4.4%	80.3	16.7x	0.4x
KPPL	7.7	+4.1%	0.8	NM	NM

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BEACHHATCH	87.8	-4.1%	22.0	36.0x	6.6x
TALLUSPIN	4.8	-4.0%	0.2	NM	0x
CAPMBDBLMF	5.7	-3.4%	0.3	NM	0.7x
GSPFINANCE	5.8	-3.3%	0.6	NM	0.4x
ARAMITCEM	11.7	-3.3%	0.2	NM	NM
MONOSPOOL	116.2	-3.2%	19.0	33.0x	2.7x
SEMILLECMF	6.0	-3.2%	1.4	NM	0.7x
TUNGHAI	3.0	-3.2%	0.2	NM	NM
POPULAR1MF	3.1	-3.1%	1.0	NM	0.3x
FASFIN	3.2	-3.0%	0.4	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%	10.7x	3.0x
RENATA	35,002	2.6%	23.5x	2.2x
ISLAMIBANK	33,649	2.5%	16.4x	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%	12.4x	7.6x
LHB	24,690	1.8%	15.4x	3.1x
EBL	24,199	1.8%	5.1x	0.8x
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%	4.9x	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%	7.4x	0.7x
ORIONPHARM	11,317	0.8%	45.0x	0.4x
ROBI	10,738	0.8%	27.0x	2.3x

\* 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	222.8	+0.1%	218.0	9.4x	1.5x
ACMELAB	79.4	-0.1%	182.5	7.1x	0.7x
ORIONINFU	397.8	+6.2%	169.4	NM	24.9x
BSC	93.9	+0.9%	136.8	4.9x	0.9x
ROBI	28.3	+1.8%	108.5	27.0x	2.3x
GP	325.4	+0.4%	102.8	12.4x	7.6x
FINEFOODS	219.5	+1.5%	93.4	NM	18.4x
SAIHAMCOT	16.5	+4.4%	80.3	16.7x	0.4x
GPHISPAT	22.5	+0.4%	67.5	11.4x	0.4x
KBPPWBIL	131.0	+3.1%	64.2	NM	11.0x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
FINEFOODS	218.0	201.0	5.0	92	19.97
BATBC	347.0	347.0	2.0	53	18.39
EIL	57.0	52.6	8.0	318	17.43
AIL	93.5	93.5	5.0	166	15.52
AL-HAJTEX	115.1	115.0	16.0	134	15.37
ICBPMF1S1	5.4	5.4	1.0	2,170	11.72
ORIONINFU	407.0	343.2	5.0	25	8.79
SONALILIFE	57.4	57.4	1.0	100	5.74
DBH	39.3	39.3	1.0	129	5.07
ACMELAB	79.8	79.7	4.0	61	4.87

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
FINEFOODS	218.0	201.0	20.0	92	5
BATBC	347.0	347.0	18.4	53	2
EIL	57.0	52.6	17.4	318	8
AIL	93.5	93.5	15.5	166	5
AL-HAJTEX	115.1	115.0	15.4	134	16
ICBEPMF1S1	5.4	5.4	11.7	2,170	1
ORIONINFU	407.0	343.2	8.8	25	5
SONALILIFE	57.4	57.4	5.7	100	1
DBH	39.3	39.3	5.1	129	1
ACMELAB	79.8	79.7	4.9	61	4
RELIANCE1	20.0	18.0	4.7	240	2
PRIMELIFE	36.0	36.0	3.2	87	1
ASIATICLAB	36.0	35.5	2.1	60	2
PREMIERCEM	49.9	49.9	2.0	40	2
TECHNODRUG	38.0	32.6	1.9	53	2
SIMTEX	18.0	18.0	1.7	95	1
BSC	83.9	83.9	1.5	18	1
EBL	26.0	26.0	1.3	50	1
LOVELLO	84.5	84.5	1.3	15	1
BEACONPHAR	132.0	132.0	1.1	8	1
BEXIMCO	100.0	99.1	1.0	10	2
SUNLIFEINS	58.9	58.9	1.0	17	1
<b>Total</b>			<b>150.4</b>		<b>72</b>

**Important DSE News**
**TRUSTBANK**

The company has informed that the Board of Directors, in its meeting held on 18 December 2024, has decided to inject BDT 312,500,000.00 (Taka Thirty One Crore Twenty Five Lac) only as fresh capital to Trust Axiata Digital Limited (TADL), a fully owned subsidiary company of Trust Bank PCL for the purpose of strengthening the capital base and expansion of business.

**SAIHAMCOT**

The Company will be placed in 'B' category from existing 'A' category with effect from December 22, 2024 as the Company has approved 5% Cash Dividend for the year ended June 30, 2024.

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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