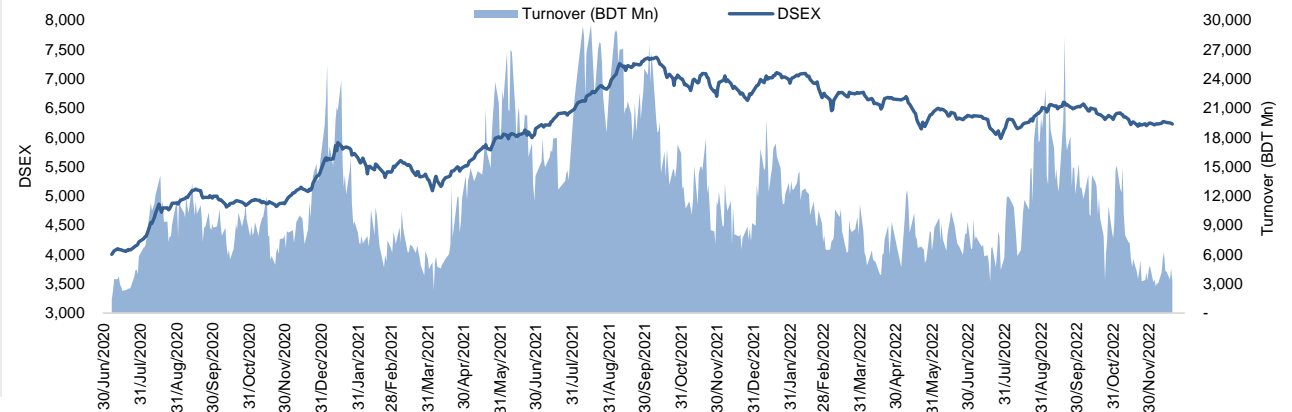


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.20%) lost 12.49 points and closed at 6,226.50. The blue-chip index DS30 (-0.11%), the Shariah-based index DSES (-0.26%), and the large-cap index CDSET (-0.08%) closed at 2,199.47, 1,363.32, and 1,216.42 points, respectively. All the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.30% followed by Food & Allied (-0.15%), Engineering (-0.14%), Fuel & Power (-0.11%), Bank (-0.05%), NBF1 (0.00%), and Telecommunication (0.00%), respectively. Block trades contributed 4.2% of the overall market turnover. Monno Ceramic Industries Ltd. (+0.7%) was the most traded share with a turnover of BDT 253 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,226.50	6,238.99	-12.49	-0.20%	-7.8%
DS30	2,199.47	2,201.78	-2.32	-0.11%	-13.2%
DSES	1,363.32	1,366.82	-3.50	-0.26%	-4.7%
CDSET	1,216.42	1,217.41	-0.99	-0.08%	-10.5%

	Advanced	Declined	Unchanged	Total
All Category	14	68	235	317
A Category (Equity)	6	48	163	217
B Category (Equity)	7	15	56	78
N Category (Equity)	1	3	5	9
Z Category (Equity)	0	2	11	13
Mutual Funds	0	0	18	18
Corporate Bonds	0	0	2	2
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,623,414	7,630,019	-0.1%
	Mn USD	72,414	72,477	
Turnover	Mn BDT	3,224	4,570	-29.4%
	Mn USD	31	43	
Volume	Mn Shares	41	61	-33.3%
	No. of Trade	81,278	80,503	+1.0%

* Average Interbank Exchange Rate is BDT 105.28 as of Dec 19, 2022

Fahim Hassan Research Associate (880) 1709636546 fahim.hassan@bracepl.com	Md. Tanvir Ahmed Research Associate (880) 1708805201 mtanvir.ahmed@bracepl.com
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Figure: Sectorial Turnover (BDT)

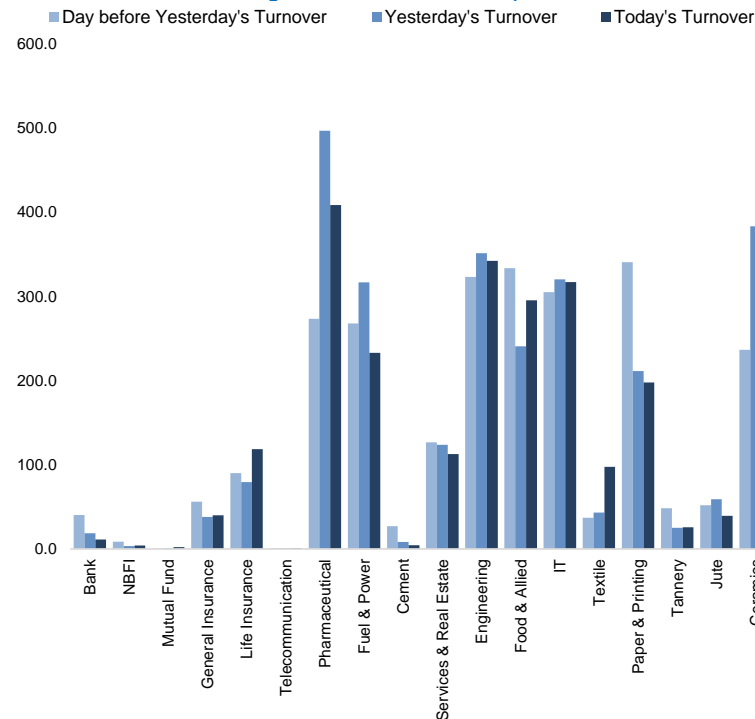
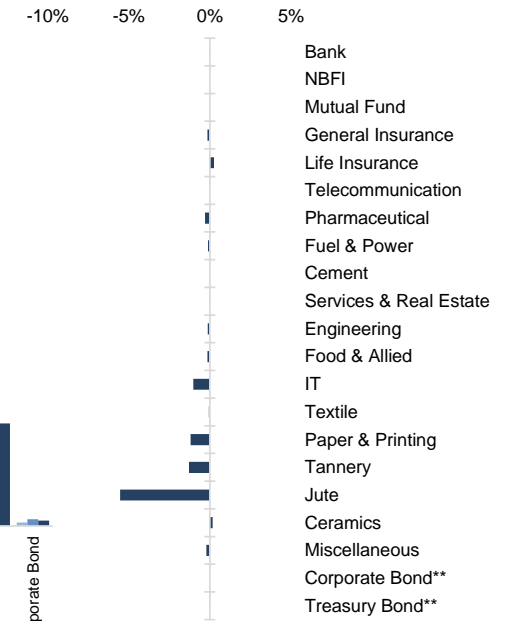


Figure: Sectorial Mcap Change



Market PE 17.1x

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	1,428	1,429	-0.66	-0.05%	34	667,077	8.7%	11.3	0.4%	7.7x	0.7x	GP	386,996	8.6%	0.8	11.2x	9.1x
NBFI	1,921	1,921	-0.00	-0.00%	23	187,417	2.5%	4.1	0.2%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-	-	37	38,610	0.5%	2.2	0.1%	NM	0.8x	BATBC	280,098	6.3%	1.2	16.8x	6.7x
General Insurance	3,192	3,197	-4.71	-0.15%	42	93,170	1.2%	40.0	1.5%	15.6x	1.5x	SQURPHARMA	185,977	4.2%	1.3	10.0x	1.7x
Life Insurance	2,482	2,476	+6.48	+0.26%	14	69,612	0.9%	118.5	4.5%	NM	NM	ROBI	157,138	3.5%	0.2	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	1.0	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.0	28.1x	4.6x
Pharmaceutical	3,772	3,783	-11.42	-0.30%	33	722,677	9.5%	408.4	15.4%	18.6x	2.4x	UPGDCL	135,475	3.0%	0.0	13.6x	3.8x
Fuel & Power	1,699	1,700	-1.81	-0.11%	23	447,856	5.9%	232.7	8.8%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.2	8.2x	1.2x
Cement	2,321	2,321	-	-	7	111,457	1.5%	4.3	0.2%	33.5x	2.5x	BERGERPBL	79,380	1.8%	6.4	25.8x	6.9x
Services & Real Estate	1,746	1,746	-0.28	-0.02%	8	68,979	0.9%	112.6	4.2%	39.0x	0.9x	MARICO	76,277	1.7%	0.6	21.3x	44.9x
Engineering	4,508	4,514	-6.14	-0.14%	42	529,100	6.9%	341.9	12.9%	35.4x	1.8x	ICB	74,119	1.7%	0.2	68.1x	1.6x
Food & Allied	21,285	21,317	-32.19	-0.15%	21	379,270	5.0%	295.1	11.1%	21.5x	7.4x	BEACONPHAR	66,921	1.5%	11.2	82.3x	10.8x
IT	3,001	3,032	-31.04	-1.02%	11	39,128	0.5%	316.9	12.0%	27.9x	2.7x	BXPBARMA	65,489	1.5%	30.4	12.8x	1.6x
Textile	1,631	1,632	-1.10	-0.07%	58	171,592	2.3%	97.5	3.7%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.1	10.9x	1.0x
Paper & Printing	10,556	10,683	-127.05	-1.19%	6	40,673	0.5%	197.7	7.5%	45.8x	2.1x	ISLAMIBANK	52,808	1.2%	1.1	10.8x	0.8x
Tannery	3,104	3,145	-40.55	-1.29%	6	32,784	0.4%	25.8	1.0%	39.8x	3.0x	DUTCHBANGL	43,554	1.0%	0.0	7.4x	1.1x
Jute	15,317	16,213	-895.74	-5.52%	3	3,747	0.0%	39.5	1.5%	NM	132.2x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	725	723	+1.22	+0.17%	5	33,515	0.4%	273.6	10.3%	35.1x	2.0x	POWERGRID	37,347	0.8%	0.0	38.5x	0.4x
Miscellaneous	4,072	4,081	-8.58	-0.21%	15	228,432	3.0%	121.8	4.6%	12.5x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.0x	0.9x
Corporate Bond**	91	91	-	-	9	37,579	0.5%	6.2	0.2%	NM	NM	BSCCL	36,098	0.8%	0.0	14.9x	3.4x
Treasury Bond**	98	98	-0.01	-0.01%	252	3,142,831	41.2%	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
ICICL	16.0	+9.6%	0.0	17.7x	1.0x	SQURPHARMA	121,685	7.2%	10.0x	1.7x	MONNOCERA	144.4	+0.7%	253.0	NM	1.7x
STYLECRAFT	112.0	+6.2%	41.9	NM	6.5x	BATBC	74,086	4.4%	16.8x	6.7x	INTRACO	42.9	-7.1%	191.5	34.8x	3.4x
BDAUTOCA	159.5	+3.5%	60.7	NM	21.7x	BEXIMCO	70,355	4.2%	8.2x	1.2x	GENEXIL	84.4	-	121.9	24.4x	4.7x
GQBALLPEN	106.8	+3.5%	21.4	NM	0.8x	RENATA	68,196	4.0%	28.1x	4.6x	BPML	77.7	-1.9%	115.4	20.8x	1.0x
AZIZPIPES	107.7	+3.4%	29.3	NM	NM	BEACONPHAR	46,844	2.8%	82.3x	10.8x	ADVENT	25.5	-5.2%	108.2	23.9x	1.8x
PRAGATILIF	113.2	+3.0%	30.5	NM	NM	BXPBARMA	45,725	2.7%	12.8x	1.6x	MONNOAGML	822.7	-1.6%	107.1	NM	4.7x
SONALILIFE	58.6	+2.1%	10.8	NM	NM	GP	38,700	2.3%	11.2x	9.1x	ORIONINFU	617.4	-7.5%	101.8	NM	41.7x
STANCERAM	157.4	+1.9%	20.5	NM	23.6x	BRACBANK	30,976	1.8%	10.9x	1.0x	AAMRANET	52.0	-4.8%	72.3	22.7x	1.4x
RUPALILIFE	79.2	+1.3%	5.5	NM	NM	LHBL	26,581	1.6%	18.4x	4.1x	ORIONPHARM	84.2	-0.6%	68.8	20.8x	0.9x
SEAPEARL	171.9	+1.2%	19.6	63.7x	13.2x	ISLAMIBANK	23,721	1.4%	10.8x	0.8x	APEXFOODS	316.0	-4.8%	65.3	48.8x	2.4x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB	Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
JUTESPINN	332.0	-8.1%	6.8	NM	NM	ANWARGALV	209.0	209.0	4.0	795	166.16
ORIONINFU	617.4	-7.5%	101.8	NM	42x	RENATA	1,223.0	1,141.8	5.0	69	84.19
INTRACO	42.9	-7.1%	191.5	34.8x	3.4x	INTRACO	47.0	44.0	12.0	1,241	56.22
ECABLES	206.4	-6.1%	36.5	NM	0.6x	SQURPHARMA	205.0	201.2	13.0	268	54.77
NORTHERN	263.5	-5.4%	8.4	NM	3.2x	BRACBANK	34.7	34.7	6.0	1,250	43.38
ADVENT	25.5	-5.2%	108.2	23.9x	1.8x	BXPBARMA	149.9	149.9	1.0	200	29.98
SONALIANS	482.7	-5.0%	24.3	NM	4.2x	BEXIMCO	124.9	104.1	8.0	154	18.20
APEXFOODS	316.0	-4.8%	65.3	48.8x	2.4x	POWERGRID	52.0	52.0	1.0	300	15.60
AAMRANET	52.0	-4.8%	72.3	22.7x	1.4x	GP	264.5	261.6	14.0	44	11.54
APEXFOOT	267.5	-4.3%	23.2	24.0x	1.1x	BEACONPHAR	315.0	314.0	3.0	33	10.37

* 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
ANWARGALV	209.0	209.0	166.2	795	4	SBACBANK Referring to the BSEC letter No. BSEC/SRMIC/2021-204/482 dated November 02, 2022, Tahmina Afroz, one of the Sponsors of the Company, has expressed intention to sell her entire holding 3,48,21,563 shares of the company at prevailing market price (in the Block Market) through Dhaka Stock Exchange within next 30 working days..
RENATA	1,223.0	1,141.8	84.2	69	5	
INTRACO	47.0	44.0	56.2	1,241	12	
SQURPHARMA	205.0	201.2	54.8	268	13	
BRACBANK	34.7	34.7	43.4	1,250	6	
BXPHARMA	149.9	149.9	30.0	200	1	
BEXIMCO	124.9	104.1	18.2	154	8	
POWERGRID	52.0	52.0	15.6	300	1	
GP	264.5	261.6	11.5	44	14	
BEACONPHAR	315.0	314.0	10.4	33	3	
FORTUNE	80.0	80.0	10.0	125	1	
LHBL	70.6	70.6	9.9	140	3	
SINGERBD	138.0	138.0	8.7	63	1	
SONALILIFE	60.0	60.0	4.5	75	1	
MAKSONSPIN	22.3	21.0	4.4	209	3	
BATBC	480.1	479.8	3.5	7	7	
BSCCL	200.0	199.8	3.5	18	3	
AL-HAJTEX	132.0	132.0	3.3	25	1	
SILCOPHL	26.0	26.0	2.7	104	2	
MEGHNALIFE	66.0	66.0	2.6	40	1	
BDTHAIFOOD	50.4	48.5	2.5	51	3	
IBP	15.3	15.3	2.1	135	4	
Total			573.2		134	

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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