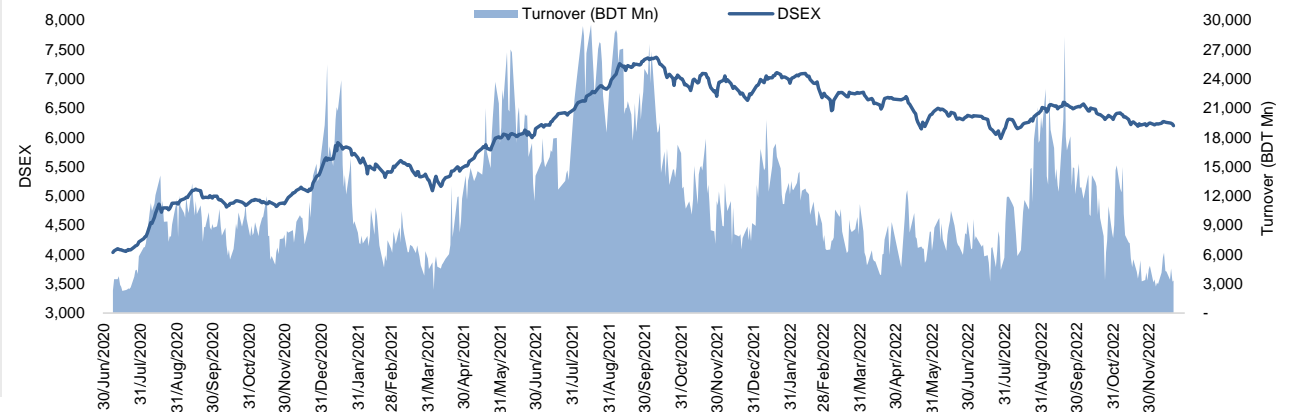


Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.44%) lost 27.68 points and closed at 6,198.82. The blue-chip index DS30 (-0.29%), the Shariah-based index DSES (-0.59%), and the large-cap index CDSET (-0.23%) closed at 2,193.03, 1,355.26, and 1,213.64 points, respectively. All the large-cap sectors posted negative performance today. Pharmaceutical experienced the highest loss of 0.72% followed by Food & Allied (-0.41%), Fuel & Power (-0.27%), Engineering (-0.15%), Bank (-0.05%), NBF1 (0.00%), and Telecommunication (0.00%), respectively. Block trades contributed 4.3% of the overall market turnover. Monno Ceramic Industries Ltd. (-8.0%) was the most traded share with a turnover of BDT 377 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	6,198.82	6,226.50	-27.68	-0.44%	-8.3%
DS30	2,193.03	2,199.47	-6.43	-0.29%	-13.4%
DSES	1,355.26	1,363.32	-8.06	-0.59%	-5.3%
CDSET	1,213.64	1,216.42	-2.78	-0.23%	-10.7%

	Advanced	Declined	Unchanged	Total
All Category	11	77	205	293
A Category (Equity)	6	53	148	207
B Category (Equity)	4	18	46	68
N Category (Equity)	1	4	4	9
Z Category (Equity)	0	2	7	9
Mutual Funds	0	1	15	16
Corporate Bonds	0	0	1	1
Treasury Bonds	0	0	0	0

* Based on Traded Scripts

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	7,608,621	7,623,414	-0.2%
	Mn USD	73,156	73,299	
Turnover	Mn BDT	3,336	3,224	+3.5%
	Mn USD	32	31	
Volume	Mn Shares	45	41	+10.1%
	No. of Trade	80,489	81,278	-1.0%

* Average Interbank Exchange Rate is BDT 104.01 as of Dec 20, 2022

Figure: Sectorial Turnover (BDT)

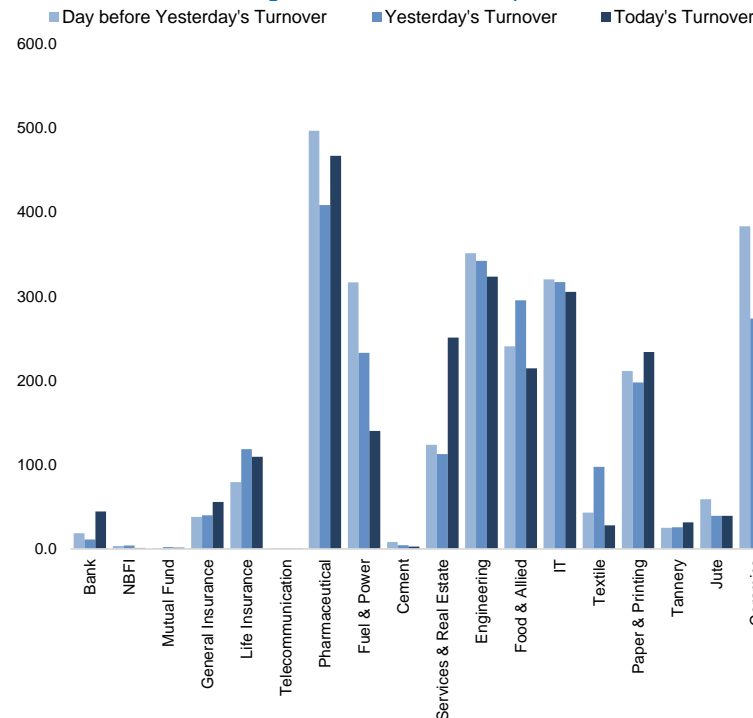
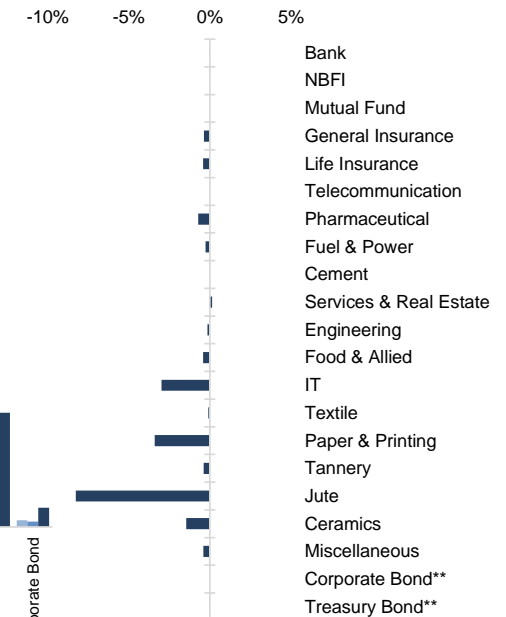


Figure: Sectorial Mcap Change



Market PE 17.1x

Market PB 1.5x

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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	1,428	-0.73	-0.05%	34	666,738	8.8%	44.6	1.6%	7.7x	0.7x	GP	386,996	8.7%	0.1	11.2x	9.1x
NBFI	1,921	1,921	-0.00	-0.00%	23	187,417	2.5%	1.1	0.0%	NM	4.5x	WALTONHIL	317,378	7.1%	0.0	35.7x	3.3x
Mutual Fund	854	854	-	-	37	38,610	0.5%	1.5	0.1%	NM	0.8x	BATBC	280,098	6.3%	0.5	16.8x	6.7x
General Insurance	3,181	3,192	-11.71	-0.37%	42	92,828	1.2%	55.8	2.0%	15.6x	1.5x	SQURPHARMA	185,977	4.2%	1.1	10.0x	1.7x
Life Insurance	2,472	2,482	-10.22	-0.41%	14	69,325	0.9%	109.3	3.9%	NM	NM	ROBI	157,138	3.5%	0.3	NM	2.4x
Telecommunication	4,946	4,946	-	-	3	580,232	7.6%	0.4	0.0%	15.4x	4.9x	RENATA	139,689	3.1%	0.3	28.1x	4.6x
Pharmaceutical	3,745	3,772	-27.25	-0.72%	33	717,455	9.4%	466.8	16.7%	18.5x	2.4x	UPGDCL	135,475	3.0%	0.0	13.6x	3.8x
Fuel & Power	1,694	1,699	-4.57	-0.27%	23	446,650	5.9%	140.0	5.0%	14.4x	1.1x	BEXIMCO	101,302	2.3%	0.6	8.2x	1.2x
Cement	2,321	2,321	-	-	7	111,457	1.5%	2.9	0.1%	33.5x	2.5x	BERGERPBL	79,385	1.8%	1.9	25.8x	6.9x
Services & Real Estate	1,748	1,746	+2.41	+0.14%	8	69,074	0.9%	251.0	9.0%	39.1x	0.9x	MARICO	76,277	1.7%	0.3	21.3x	44.9x
Engineering	4,501	4,508	-6.97	-0.15%	42	528,282	6.9%	323.3	11.6%	35.3x	1.8x	ICB	74,119	1.7%	0.0	68.1x	1.6x
Food & Allied	21,197	21,285	-87.93	-0.41%	21	377,704	5.0%	214.5	7.7%	21.4x	7.4x	BEACONPHAR	65,581	1.5%	5.4	80.7x	10.6x
IT	2,912	3,001	-89.37	-2.98%	11	37,963	0.5%	305.3	10.9%	27.1x	2.6x	BXPBARMA	65,400	1.5%	62.5	12.8x	1.6x
Textile	1,630	1,631	-1.44	-0.09%	58	171,440	2.3%	28.0	1.0%	31.2x	1.0x	BRACBANK	57,619	1.3%	0.4	10.9x	1.0x
Paper & Printing	10,197	10,556	-358.95	-3.40%	6	39,290	0.5%	233.8	8.4%	44.2x	2.0x	ISLAMIBANK	52,969	1.2%	9.7	10.8x	0.8x
Tannery	3,092	3,104	-11.73	-0.38%	6	32,661	0.4%	31.7	1.1%	39.6x	3.0x	DUTCHBANGL	43,554	1.0%	3.3	7.4x	1.1x
Jute	14,052	15,317	-1265.42	-8.26%	3	3,437	0.0%	39.3	1.4%	NM	121.3x	TITASGAS	40,459	0.9%	0.0	14.2x	0.5x
Ceramics	714	725	-10.60	-1.46%	5	33,025	0.4%	384.5	13.8%	34.5x	1.9x	POWERGRID	37,347	0.8%	0.1	38.5x	0.4x
Miscellaneous	4,056	4,072	-16.39	-0.40%	15	227,512	3.0%	135.5	4.9%	12.4x	1.8x	SUMITPOWER	36,308	0.8%	0.0	10.0x	0.9x
Corporate Bond**	91	91	-	-	9	37,579	0.5%	23.0	0.8%	NM	NM	BSCCL	36,098	0.8%	0.0	14.9x	3.4x
Treasury Bond**	98	98	-0.02	-0.02%	252	3,142,283	41.3%	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	17.6	+10.0%	0.0	19.5x	1.1x	SQURPHARMA	121,685	7.3%	10.0x	1.7x	MONNOCERA	132.9	-8.0%	376.9	NM	1.6x
SEAPEARL	182.5	+6.2%	135.1	67.6x	14.0x	BATBC	74,086	4.4%	16.8x	6.7x	ORIONPHARM	81.2	-3.6%	153.0	20.1x	0.9x
ATLASBANG	106.4	+2.1%	0.9	NM	0.8x	BEXIMCO	70,355	4.2%	8.2x	1.2x	SEAPEARL	182.5	+6.2%	135.1	67.6x	14.0x
ADNTEL	107.5	+1.5%	36.2	36.2x	3.8x	RENATA	68,196	4.1%	28.1x	4.6x	MONNOAGML	814.9	-0.9%	131.0	NM	4.7x
PRAGATILIF	113.9	+0.6%	52.9	NM	NM	BEACONPHAR	45,907	2.7%	80.7x	10.6x	BPML	72.4	-6.8%	130.7	19.4x	1.0x
ISLAMIBANK	32.9	+0.3%	9.7	10.8x	0.8x	BXPBARMA	45,662	2.7%	12.8x	1.6x	INTRACO	39.3	-8.4%	105.5	31.8x	3.1x
BGIC	56.3	+0.2%	10.1	35.2x	3x	GP	38,700	2.3%	11.2x	9.1x	ADVENT	23.3	-8.6%	104.0	21.8x	1.6x
NTC	610.0	+0.0%	7.8	NM	12.1x	BRACBANK	30,976	1.8%	10.9x	1.0x	GENEXIL	79.0	-6.4%	99.3	22.8x	4.4x
BERGERPBL	1,711.7	+0.0%	1.9	25.8x	6.9x	LHBL	26,581	1.6%	18.4x	4.1x	ORIONINFU	571.1	-7.5%	72.2	NM	38.6x
ABBANK	9.9	-	0.3	10.6x	0.3x	ISLAMIBANK	23,794	1.4%	10.8x	0.8x	BXPBARMA	146.6	-0.1%	62.5	12.8x	1.6x

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	303.0	-8.7%	3.2	NM	NM	ACMELAB	86.0	85.0	2.0	1,000	85.08
NORTHERN	240.5	-8.7%	4.6	NM	3x	MPETROLEUM	198.6	198.6	1.0	331	65.74
ADVENT	23.3	-8.6%	104.0	21.8x	1.6x	SEAPEARL	177.0	157.0	10.0	304	51.93
KOHINOOR	422.3	-8.4%	11.2	39.0x	7.7x	APEXFOOT	264.0	264.0	2.0	156	41.06
INTRACO	39.3	-8.4%	105.5	31.8x	3.1x	BXPBARMA	149.9	149.9	2.0	200	29.98
MONOSPOOL	281.0	-8.1%	52.7	41.9x	6.1x	SBACBANK	10.6	10.6	2.0	2,682	28.43
SONALIANSH	443.8	-8.1%	31.6	NM	3.9x	ACI	250.0	240.0	3.0	87	21.68
PAPERPROC	195.3	-8.1%	37.3	41.5x	6.0x	INTRACO	47.0	44.0	6.0	445	19.96
MONNOCERA	132.9	-8.0%	376.9	NM	1.6x	BERGERPBL	1,711.6	1,711.6	1.0	10	17.12
ECABLES	190.3	-7.8%	26.9	NM	0.6x	ADNTEL	114.9	102.5	3.0	151	16.31

* 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
ACMELAB	86.0	85.0	85.1	1,000	2
MPETROLEUM	198.6	198.6	65.7	331	1
SEAPEARL	177.0	157.0	51.9	304	10
APEXFOOT	264.0	264.0	41.1	156	2
BXPHARMA	149.9	149.9	30.0	200	2
SBACBANK	10.6	10.6	28.4	2,682	2
ACI	250.0	240.0	21.7	87	3
INTRACO	47.0	44.0	20.0	445	6
BERGERPBL	1,711.6	1,711.6	17.1	10	1
ADNTEL	114.9	102.5	16.3	151	3
SQUARETEXT	70.0	70.0	15.2	218	1
ORIONINFU	617.0	571.1	14.5	24	9
BSCCL	199.8	199.8	13.0	65	4
ACIFORMULA	155.0	155.0	13.0	84	1
SONALIPAPR	609.0	609.0	9.1	15	1
SQURPHARMA	203.0	200.6	8.6	42	10
ORIONPHARM	92.3	84.9	8.4	92	3
SINGERBD	140.0	140.0	8.0	57	1
GENEXIL	92.4	90.5	7.3	80	2
GP	272.8	262.2	6.4	24	7
BEACHHATCH	42.1	37.8	5.9	144	4
ITC	33.9	33.8	4.2	125	3
Total			543.4		143

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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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Important DSE News

APEXFOOT

Syed Manzur Elahi, one of the Sponsor Directors of the Company, has expressed his intention to buy 39,361 shares of the company at prevailing market price (in the Public Market) through Dhaka Stock Exchange within next 30 working days.

YPL

(Q1 Un-audited): EPS was Tk. (0.28) for July-September 2022 as against Tk. (0.14) for July-September 2021; NOCFPS was Tk. (0.01) for July-September 2022 as against Tk. 0.05 for July-September 2021. NAV per share was Tk. 5.88 as on September 30, 2022 and Tk. 6.16 as on June 30, 2022. Reasons for deviation in EPS and NOCFPS: Effect of pandemic (COVID-19), war of Ukraine-Russia and shortage of working capital, company's Production and sales dropped and raw material cost increased but operational and financial cost continue. So, EPS dropped down and NOCFPS stand negative.