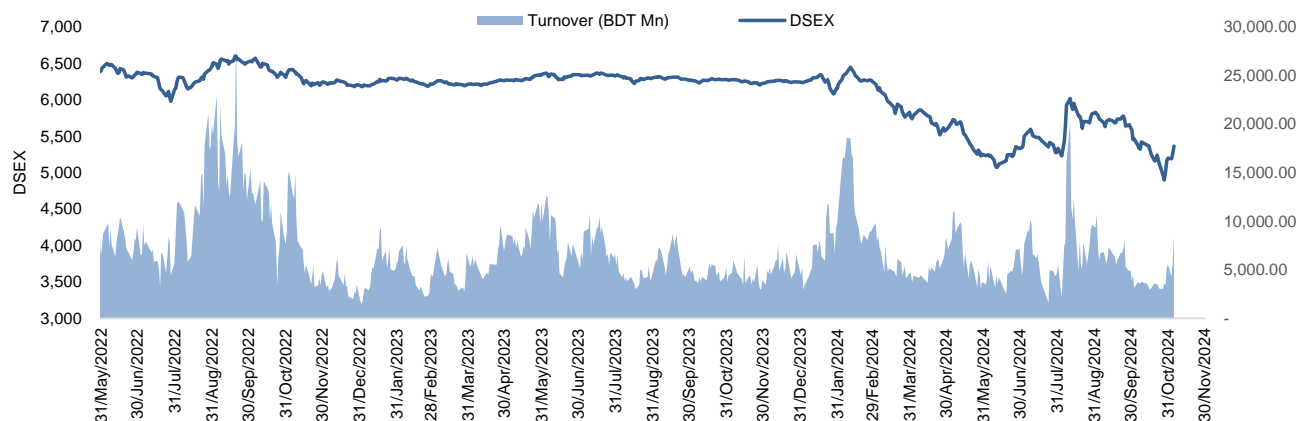


## Daily Market Update

The market closed in green today. The benchmark index DSEX (+2.14%) gained 112.52 points and closed at 5,365.02. The blue-chip index DS30 (+1.56%), the Shariah-based index DSES (+2.51%), and the large-cap index CDSET (+2.06%) closed at 1,967.76, 1,191.58, and 1,093.73 points, respectively. Most of the large-cap sectors posted positive performance today. Bank booked the highest gain of 3.11% followed by Fuel & Power (+2.41%), Engineering (+2.24%), Pharmaceutical (+1.66%), Telecommunication (+0.28%), Food & Allied (-0.26%), and NBFI (-0.43%), respectively. Block trades contributed 2.5% of the overall market turnover. Square Pharmaceuticals Ltd. (+1.0%) was the most traded share with a turnover of BDT 332 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,365.02	5,252.50	+112.52	+2.14%	-14.1%
DS30	1,967.76	1,937.59	+30.17	+1.56%	-6.0%
DSES	1,191.58	1,162.40	+29.18	+2.51%	-12.6%
CDSET	1,093.73	1,071.67	+22.06	+2.06%	-9.1%

	Advanced	Declined	Unchanged	Total
All Category	304	65	30	399
A Category (Equity)	180	35	17	232
B Category (Equity)	64	12	6	82
N Category (Equity)	2	3	0	5
Z Category (Equity)	58	15	7	80
Mutual Funds	25	4	8	37
Corporate Bonds	1	1	1	3
Treasury Bonds	1	0	0	1

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,729,614	6,670,964	+0.9%
	Mn USD	56,080	55,591	
Turnover	Mn BDT	8,397	5,652	+48.6%
	Mn USD	70	47	
Volume	Mn Shares	307	222	+38.4%
	No. of Trade	237,234	186,940	+26.9%

\* Average Interbank Exchange Rate is BDT 120.00 as of Nov 05, 2024

Figure: Sectorial Turnover (BDT Mn)

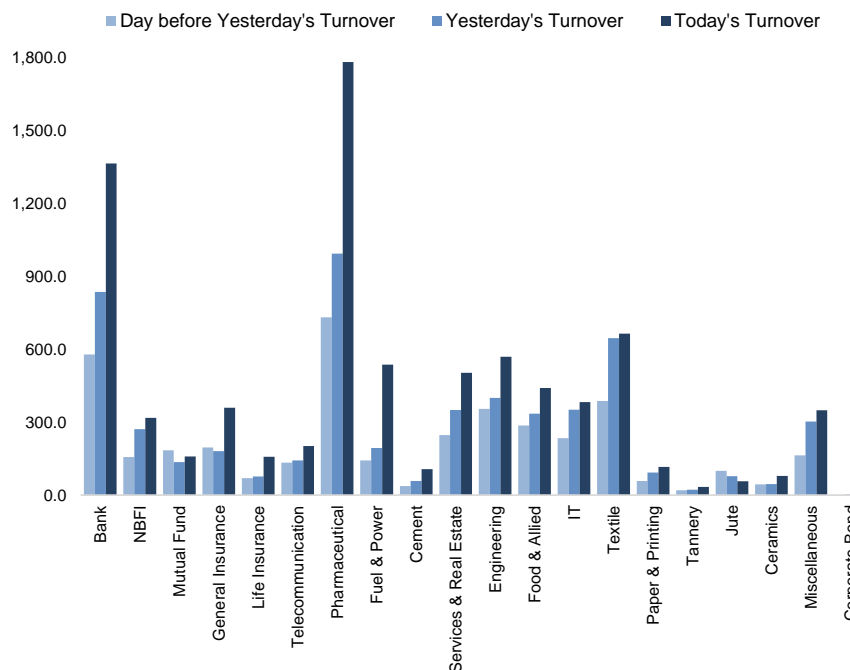
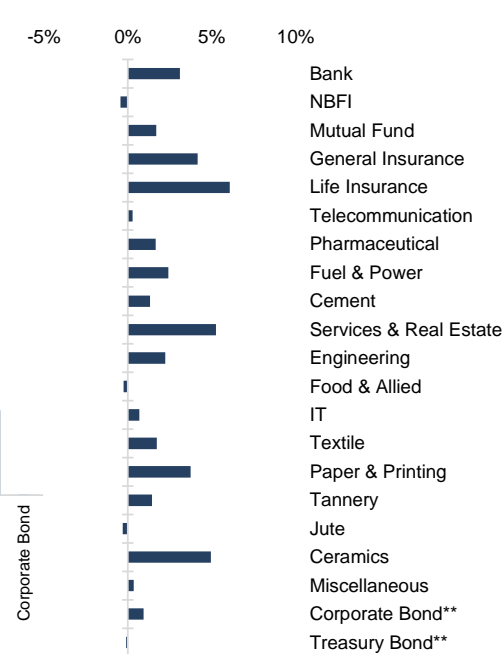


Figure: Sectorial Mcap Change



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Market PE 15.7x  
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	1,499	1,453	+45.23	+3.11%	36	717,809	10.7%	1,365.1	16.7%	9.1x	0.7x	GP	426,830	11.5%	102.6	12.1x	7.4x
NBFI	1,290	1,295	-5.61	-0.43%	23	124,853	1.9%	318.5	3.9%	NM	NM	BATBC	199,854	5.4%	58.9	11.4x	3.3x
Mutual Fund	627	616	+10.48	+1.70%	37	29,273	0.4%	159.4	1.9%	NM	0.6x	SQRPHARMA	196,615	5.3%	332.2	9.4x	1.6x
General Insurance	2,742	2,633	+109.50	+4.16%	43	79,432	1.2%	359.1	4.4%	14.4x	1.2x	WALTONHIL	156,462	4.2%	14.9	11.5x	1.4x
Life Insurance	1,950	1,839	+111.85	+6.08%	15	51,852	0.8%	157.9	1.9%	NM	NM	ROBI	142,472	3.8%	81.1	25.9x	2.2x
Telecommunication	5,120	5,106	+14.51	+0.28%	3	592,869	8.8%	201.4	2.5%	14.0x	4.3x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,011	2,961	+49.15	+1.66%	34	571,217	8.5%	1,782.2	21.8%	14.1x	1.6x	ISLAMIBANK	94,667	2.6%	193.8	20.3x	1.3x
Fuel & Power	1,155	1,128	+27.23	+2.41%	23	304,126	4.5%	537.1	6.6%	17.4x	0.6x	BRACBANK	92,379	2.5%	188.9	8.3x	1.2x
Cement	2,103	2,075	+27.42	+1.32%	7	100,422	1.5%	106.4	1.3%	16.5x	2.1x	BERGERPBL	82,710	2.2%	1.7	24.8x	5.2x
Services & Real Estate	1,154	1,096	+57.62	+5.26%	9	63,801	0.9%	503.1	6.1%	19.8x	0.5x	RENATA	78,257	2.1%	21.7	21.6x	2.3x
Engineering	2,568	2,512	+56.17	+2.24%	42	296,674	4.4%	569.2	7.0%	13.3x	0.9x	MARICO	73,603	2.0%	5.2	13.9x	9.7x
Food & Allied	17,335	17,379	-44.67	-0.26%	21	318,260	4.7%	441.2	5.4%	17.1x	4.5x	LHB	65,385	1.8%	44.9	16.2x	3.2x
IT	2,173	2,158	+14.92	+0.69%	11	28,582	0.4%	382.6	4.7%	19.8x	1.9x	ICB	57,846	1.6%	28.3	NM	1.4x
Textile	1,135	1,116	+19.36	+1.74%	58	117,771	1.8%	664.5	8.1%	NM	0.8x	UNILEVERCL	51,971	1.4%	0.3	70.7x	22.1x
Paper & Printing	4,638	4,471	+167.70	+3.75%	6	21,280	0.3%	116.0	1.4%	37.2x	0.9x	DUTCHBANGL	41,920	1.1%	10.4	6.7x	0.9x
Tannery	2,005	1,976	+28.64	+1.45%	6	22,254	0.3%	34.1	0.4%	62.1x	1.6x	POWERGRID	34,999	0.9%	4.0	NM	0.2x
Jute	18,050	18,105	-55.27	-0.31%	3	4,230	0.1%	57.3	0.7%	NM	NM	BXPHERMA	33,949	0.9%	80.8	5.8x	0.7x
Ceramics	387	368	+18.26	+4.96%	5	17,164	0.3%	79.0	1.0%	NM	1.0x	EBL	33,818	0.9%	25.1	5.2x	0.8x
Miscellaneous	4,210	4,195	+14.65	+0.35%	15	229,383	3.4%	349.6	4.3%	38.1x	1.7x	PUBALIBANK	31,350	0.8%	8.9	3.3x	0.6x
Corporate Bond**	10,451	10,353	+97.26	+0.94%	16	34,913	0.5%	0.1	0.0%	NM	NM	OLYMPIC	31,110	0.8%	30.7	17.0x	2.9x
Treasury Bond**	451	451	-0.44	-0.10%	236	3,002,958	44.6%	2.4	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
FUWANGFOOD	14.3	+10.0%	27.4	NM	5.8x	SQRPHARMA	117,112	8.6%	9.4x	1.6x	SQRPHARMA	221.8	+1.0%	332.2	9.4x	1.6x
ARAMITCEM	13.2	+10.0%	0.8	NM	NM	BEXIMCO	69,460	5.1%	NM	1.2x	ACMELAB	81.4	+2.6%	318.7	7.0x	0.7x
SHURWID	7.7	+10.0%	1.4	NM	0.6x	BATBC	45,948	3.4%	11.4x	3.3x	LINDEBD	1,085.4	+0.9%	219.7	2.7x	4.9x
RUPALILIFE	92.6	+10.0%	18.7	NM	NM	RENATA	35,002	2.6%	21.6x	2.3x	BSC	91.1	+2.5%	208.9	4.8x	0.8x
NATLIFEINS	124.7	+10.0%	18.5	NM	NM	ISLAMIBANK	33,649	2.5%	20.3x	1.3x	ISLAMIBANK	58.8	+9.9%	193.8	20.3x	1.3x
GHCL	24.3	+9.95%	16.6	NM	0.6x	BXPHERMA	32,479	2.4%	5.8x	0.7x	BRACBANK	52.2	+1.4%	188.9	8.3x	1.2x
BESTHLDNG	23.2	+10.0%	131.3	16.9x	0x	BRACBANK	32,157	2.4%	8.3x	1.2x	ORIONPHARM	41.7	+0.2%	173.4	9.5x	0.4x
ISLAMIBANK	58.8	+9.9%	193.8	20.3x	1.3x	GP	30,004	2.2%	12.1x	7.4x	MIDLANDBNK	33.0	+8.2%	155.8	19.1x	2.3x
DSSL	8.9	+9.9%	13.4	38.7x	0.5x	LHB	24,690	1.8%	16.2x	3.2x	ASIATICLAB	34.5	-1.7%	144.1	12.2x	0.7x
BDTHAIFOOD	16.8	+9.8%	4.5	NM	1.1x	EBL	24,199	1.8%	5.2x	0.8x	LOVELLO	88.8	-5.1%	133.8	44.0x	6.2x

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)
LOVELLO	88.8	-5.1%	133.8	44.0x	6.2x	MIDLANDBNK	30.7	28.5	21.0	1,841	53.58
UNITEDFIN	15.3	-5.0%	31.0	17.6x	1x	KBPPWBIL	138.0	138.0	10.0	147	20.33
PENINSULA	10.9	-4.4%	2.5	NM	0.4x	MJLBD	94.5	94.0	9.0	207	19.46
METROSPIN	10.3	-3.7%	1.3	NM	1.5x	BEXIMCO	104.8	104.1	24.0	172	18.01
ORIONINFU	300.0	-3.5%	87.8	NM	20.1x	BXPHERMA	81.0	74.2	2.0	226	16.95
PLFSL	2.9	-3.3%	3.0	NM	NM	CENTRALINS	48.0	48.0	1.0	350	16.80
TUNGHAI	3.3	-2.9%	1.1	NM	NM	RELIANCE1	18.0	17.2	10.0	686	12.00
BIFC	10.0	-2.9%	1.3	NM	NM	BRACBANK	51.3	51.3	4.0	198	10.15
CONFIDCEM	51.0	-2.7%	29.1	5.8x	0.7x	BEACHHATCH	86.0	83.5	3.0	67	5.72
RAHIMTEXT	121.4	-2.6%	3.7	NM	4.9x	EIL	57.0	57.0	1.0	85	4.85

\* 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	Important DSE News
MIDLANDBNK	30.7	28.5	53.6	1,841	21	<b>CENTRALPHL</b> The Board of Directors has recommended No dividend for the year ended June 30, 2024. Date of AGM: 30.12.2024, Time: 11:30 AM, Venue: Hall Patio, Gulshan Club Limited, House: Nwji/2/A, Bir Uttom Sultan Mahmud Road, Gulshan 02, Dhaka-1212. Record date: 27.11.2024. The Company has also reported EPS of Tk. (0.35), NAV per share of Tk. 7.06 and NOCFPS of Tk. 0.02 for the year ended June 30, 2024 as against Tk. (0.37), Tk. 5.59 and Tk. (0.00) respectively for the year ended June 30, 2023
KBPPWBIL	138.0	138.0	20.3	147	10	
MJLBD	94.5	94.0	19.5	207	9	
BEXIMCO	104.8	104.1	18.0	172	24	
BXPHARMA	81.0	74.2	16.9	226	2	
CENTRALINS	48.0	48.0	16.8	350	1	
RELIANCE1	18.0	17.2	12.0	686	10	
BRACBANK	51.3	51.3	10.1	198	4	
BEACHHATCH	86.0	83.5	5.7	67	3	
EIL	57.0	57.0	4.8	85	1	
ORIONINFU	319.4	319.4	3.2	10	1	
SHYAMPSUG	100.5	100.0	3.2	32	3	
AGNISYSL	35.8	34.5	2.6	73	2	
ISLAMIBANK	53.6	53.6	2.4	44	1	
BESTHLDNG	21.9	21.9	2.2	100	1	
RUPALIBANK	23.7	23.7	2.1	90	3	
ABB1STMF	3.6	3.6	1.8	500	1	
ABB1STMF	3.6	3.6	1.8	500	1	
AIL	95.9	95.9	1.7	18	1	
DAFODILCOM	80.0	80.0	1.6	20	1	
CRYSTALINS	50.0	50.0	1.3	27	1	
BATBC	385.0	385.0	1.3	3	2	
<b>Total</b>			<b>210.9</b>		<b>112</b>	

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
APEXFOODS		0.0%	20%	Record Date	7-Nov-24
APEXSPINN		0.0%	20%	Record Date	7-Nov-24
PREMIERCEM		0.0%	22%	Record Date	7-Nov-24
SONALIPAPR		0.0%	40%	Record Date	10-Nov-24
LOVELLO		10.0%	10%	Record Date	10-Nov-24
SHARPIND		0.0%	1%	Record Date	10-Nov-24
LHB		0.0%	19%	Record Date	11-Nov-24
MLDYING		0.0%	0%	Record Date	11-Nov-24
CROWNCEMNT		0.0%	21%	Record Date	13-Nov-24
FARCHEM		0.0%	1%	Record Date	13-Nov-24
FEKDIL		0.0%	14%	Record Date	14-Nov-24
RAHIMTEXT		0.0%	10%	Record Date	14-Nov-24
BSRMLTD		0.0%	35%	Record Date	14-Nov-24
BSRMSTEEL		0.0%	32%	Record Date	14-Nov-24
KDSALTD		5.0%	5%	Record Date	14-Nov-24

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