

Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.33%) lost 17.93 points and closed at 5,347.08. The blue-chip index DS30 (0.00%), the Shariah-based index DSES (+0.08%), and the large-cap index CDSET (+0.06%) closed at 1,967.75, 1,192.57, and 1,094.39 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 2.45%, followed by NBF1 (+0.89%), Pharmaceutical (+0.31%), Fuel & Power (+0.12%), Food & Allied (-0.43%), Bank (-0.45%), and Telecommunication (-0.67%), respectively. Block trades contributed 2.7% of the overall market turnover. Orion Pharma Ltd. (+9.8%) was the most traded share with a turnover of BDT 255 million.

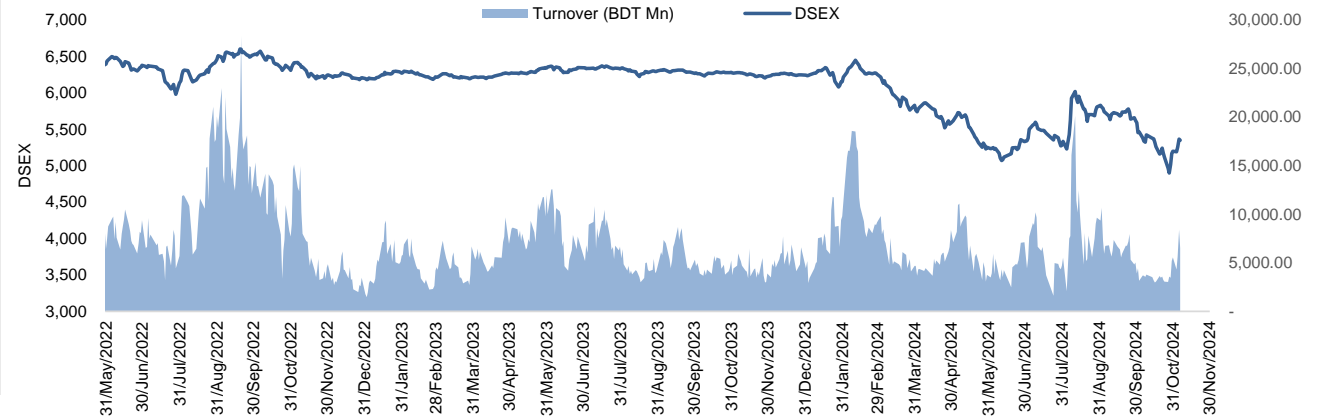
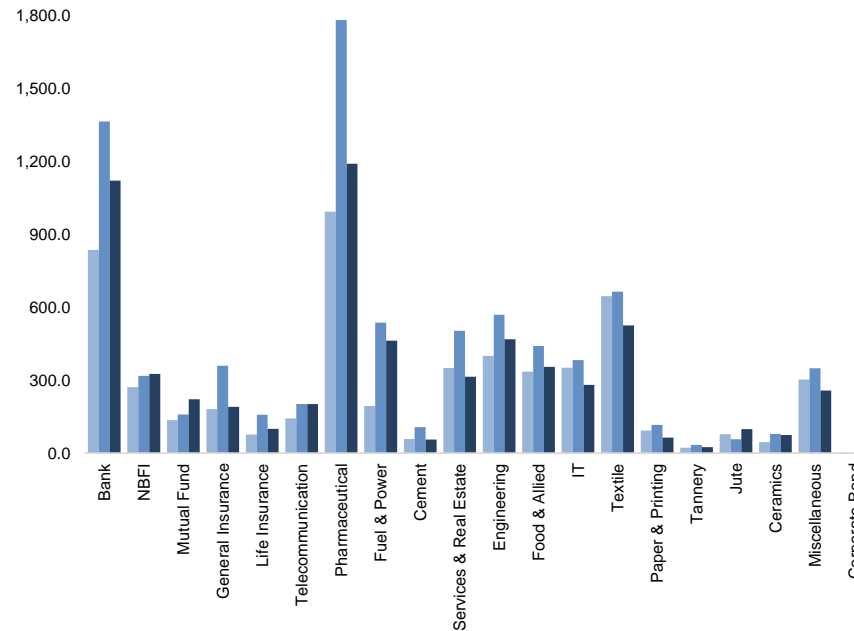


Figure: Sectorial Turnover (BDT Mn)

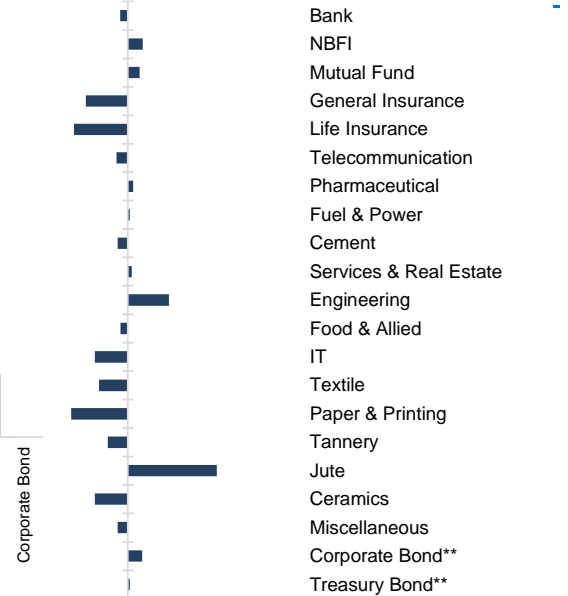
Figure: Sectorial Mcap Change

Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,347.08	5,365.02	-17.93	-0.33%	-14.4%
DS30	1,967.75	1,967.76	-0.01	-0.00%	-6.0%
DSES	1,192.57	1,191.58	+0.99	+0.08%	-12.6%
CDSET	1,094.39	1,093.73	+0.66	+0.06%	-9.0%

■ Day before Yesterday's Turnover ■ Yesterday's Turnover ■ Today's Turnover



■ -5% ■ 0% ■ 5% ■ 10%



	Advanced	Declined	Unchanged	Total
All Category	85	281	33	399
A Category (Equity)	50	166	17	233
B Category (Equity)	15	64	3	82
N Category (Equity)	1	3	0	4
Z Category (Equity)	19	48	13	80
Mutual Funds	15	14	8	37
Corporate Bonds	0	1	1	2
Treasury Bonds	1	1	0	2

* Based on Traded Scrips

	Today	Last Day	Daily %Δ	
Mcap	Mn BDT	6,726,029	6,729,614	-0.1%
	Mn USD	56,050	56,080	
Turnover	Mn BDT	6,512	8,397	-22.4%
	Mn USD	54	70	
Volume	Mn Shares	243	307	-20.9%
	No. of Trade	200,032	237,234	-15.7%

* Average Interbank Exchange Rate is BDT 120.00 as of Nov 06, 2024

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Market PE 15.6x
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	1,492	1,499	-6.69	-0.45%	36	714,602	10.6%	1,121.3	17.7%	9.1x	0.7x	GP	426,290	11.5%	134.7	12.0x	7.4x
NBFI	1,301	1,290	+11.42	+0.89%	23	125,959	1.9%	326.1	5.1%	NM	NM	BATBC	199,584	5.4%	26.5	11.4x	3.2x
Mutual Fund	631	627	+4.39	+0.70%	37	29,478	0.4%	222.1	3.5%	NM	0.6x	SQURPHARMA	196,172	5.3%	28.6	9.4x	1.6x
General Insurance	2,674	2,742	-68.58	-2.50%	43	77,446	1.2%	190.7	3.0%	14.0x	1.2x	WALTONHIL	165,278	4.5%	27.7	12.2x	1.4x
Life Insurance	1,888	1,950	-62.55	-3.21%	15	50,189	0.7%	99.7	1.6%	NM	NM	ROBI	139,853	3.8%	59.8	25.4x	2.1x
Telecommunication	5,086	5,120	-34.07	-0.67%	3	588,924	8.8%	201.9	3.2%	13.9x	4.2x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,020	3,011	+9.40	+0.31%	34	573,000	8.5%	1,190.7	18.8%	14.1x	1.6x	ISLAMIBANK	95,150	2.6%	180.1	20.4x	1.3x
Fuel & Power	1,157	1,155	+1.35	+0.12%	23	304,482	4.5%	462.7	7.3%	16.7x	0.6x	BRACBANK	91,140	2.5%	123.0	8.2x	1.2x
Cement	2,090	2,103	-12.63	-0.60%	7	99,819	1.5%	56.3	0.9%	16.4x	2.1x	BERGERPBL	81,973	2.2%	0.8	24.6x	5.2x
Services & Real Estate	1,157	1,154	+2.75	+0.24%	9	63,953	1.0%	314.0	5.0%	19.8x	0.5x	RENATA	77,214	2.1%	7.4	21.4x	2.3x
Engineering	2,631	2,568	+63.00	+2.45%	42	303,953	4.5%	469.2	7.4%	13.6x	0.9x	MARICO	73,975	2.0%	4.0	14.0x	9.7x
Food & Allied	17,260	17,335	-74.24	-0.43%	21	316,897	4.7%	355.6	5.6%	17.0x	4.5x	LHB	65,501	1.8%	18.9	16.2x	3.2x
IT	2,130	2,173	-42.81	-1.97%	11	28,019	0.4%	280.6	4.4%	19.4x	1.8x	ICB	59,928	1.6%	75.5	NM	1.4x
Textile	1,116	1,135	-19.51	-1.72%	58	115,747	1.7%	525.7	8.3%	NM	0.8x	UNILEVERCL	51,998	1.4%	0.1	70.8x	22.1x
Paper & Printing	4,482	4,638	-156.91	-3.38%	6	20,560	0.3%	63.7	1.0%	36.0x	0.9x	DUTCHBANGL	41,392	1.1%	5.5	6.6x	0.8x
Tannery	1,981	2,005	-23.84	-1.19%	6	21,989	0.3%	25.0	0.4%	61.3x	1.6x	POWERGRID	35,913	1.0%	4.5	NM	0.2x
Jute	19,009	18,050	+958.75	+5.31%	3	4,454	0.1%	98.6	1.6%	NM	NM	BXPHERMA	34,618	0.9%	113.9	5.9x	0.7x
Ceramics	379	387	-7.59	-1.96%	5	16,827	0.3%	73.9	1.2%	NM	1.0x	EBL	33,410	0.9%	30.6	5.1x	0.8x
Miscellaneous	4,184	4,210	-25.59	-0.61%	15	227,988	3.4%	257.8	4.1%	37.8x	1.7x	PUBALIBANK	31,697	0.9%	108.5	3.3x	0.6x
Corporate Bond**	10,539	10,451	+88.79	+0.85%	16	34,891	0.5%	0.1	0.0%	NM	NM	BEACONPHAR	31,093	0.8%	72.4	60.6x	4.8x
Treasury Bond**	451	451	+0.50	+0.11%	236	3,006,391	44.7%	1.7	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
BIFC	11.0	+10.0%	2.7	NM	NM	SQURPHARMA	117,112	8.6%	9.4x	1.6x	ORIONPHARM	45.8	+9.8%	255.0	10.4x	0.5x
RINGSHINE	4.4	+10.0%	5.5	NM	NM	BEXIMCO	69,460	5.1%	NM	1.2x	BSC	92.5	+1.5%	187.7	4.9x	0.9x
ORIONPHARM	45.8	+9.8%	255.0	10.4x	0.5x	BATBC	45,948	3.4%	11.4x	3.2x	ISLAMIBANK	59.1	+0.5%	180.1	20.4x	1.3x
FUWANGFOOD	15.6	+9.1%	72.6	NM	6.4x	RENATA	35,002	2.6%	21.4x	2.3x	PADMAOIL	220.8	+7.2%	169.5	4.9x	0.9x
ARAMITCEM	14.4	+9.1%	2.5	NM	NM	ISLAMIBANK	33,649	2.5%	20.4x	1.3x	FEKDIL	20.7	+2.5%	161.1	12.6x	1.0x
SSSTEEL	9.0	+8.43%	26.1	53.6x	0.4x	BXPHERMA	32,479	2.4%	5.9x	0.7x	ORIONINFU	324.9	+8.3%	156.4	NM	21.8x
ORIONINFU	324.9	+8.3%	156.4	NM	22x	BRACBANK	32,157	2.4%	8.2x	1.2x	GP	315.7	-0.1%	134.7	12.0x	7.4x
KAY&QUE	256.1	+7.5%	50.5	NM	2.8x	GP	30,004	2.2%	12.0x	7.4x	MIDLANDBNK	35.0	+6.1%	134.4	20.2x	2.4x
CAPMIBBLMF	8.8	+7.3%	4.7	NM	1.0x	LHB	24,690	1.8%	16.2x	3.2x	LANKABAFIN	20.4	+1.5%	127.9	21.0x	1.1x
PADMAOIL	220.8	+7.2%	169.5	4.9x	0.9x	EBL	24,199	1.8%	5.1x	0.8x	BRACBANK	51.5	-1.3%	123.0	8.2x	1.2x

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)
1STPRIMFMF	36.3	-6.0%	26.5	NM	3.4x	ORIONINFU	310.0	302.0	12.0	185	56.13
NTC	217.3	-5.7%	4.4	NM	NM	EBL	24.7	24.7	1.0	1,000	24.70
TAMJTEX	122.9	-5.5%	2.7	18.5x	1.3x	MIDLANDBNK	33.0	31.5	6.0	746	24.03
DELTALIFE	82.2	-5.4%	7.4	NM	NM	LOVELLO	94.2	85.1	5.0	241	21.46
SONARGAON	21.0	-5.4%	3.5	77.8x	1.1x	UNIQUEHRL	52.0	50.8	6.0	189	9.81
PRIMEFIN	5.3	-5.4%	0.4	NM	0.6x	BEACHHATCH	85.0	84.0	4.0	91	7.69
ZEALBANGLA	86.7	-5.2%	0.7	NM	NM	BSC	89.0	89.0	1.0	42	3.74
SILVAPHL	10.9	-5.2%	5.4	NM	0.7x	BEXIMCO	104.1	104.1	2.0	30	3.14
GREENDELTMF	3.7	-5.1%	2.3	NM	0.4x	GPHISPAT	26.5	26.5	1.0	100	2.65
PRAGATILIF	148.3	-5.1%	9.7	NM	NM	RELIANCE1	18.2	17.5	2.0	139	2.51

* 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
ORIONINFU	310.0	302.0	56.1	185	12
EBL	24.7	24.7	24.7	1,000	1
MIDLANDBNK	33.0	31.5	24.0	746	6
LOVELLO	94.2	85.1	21.5	241	5
UNIQUEHRL	52.0	50.8	9.8	189	6
BEACHHATCH	85.0	84.0	7.7	91	4
BSC	89.0	89.0	3.7	42	1
BEXIMCO	104.1	104.1	3.1	30	2
GPHISPAT	26.5	26.5	2.7	100	1
RELIANCE1	18.2	17.5	2.5	139	2
ISLAMIBANK	63.0	63.0	2.0	32	1
AMBEEPHA	812.0	812.0	1.6	2	2
KAY&QUE	254.8	254.8	1.6	6	1
AIBL1STIMF	7.2	7.2	1.4	200	2
FEKDIL	22.1	21.3	1.2	55	2
KBPPWBIL	137.1	137.1	1.1	8	1
EIL	54.0	54.0	1.1	20	1
EIL	54.0	54.0	1.1	20	1
IBNSINA	340.0	300.0	1.0	3	2
UCB	11.5	11.5	0.9	79	1
UNIONINS	30.0	30.0	0.9	30	1
TAMIJTEX	140.0	140.0	0.8	6	1
Total			174.5		63

Important DSE News
PADMAOIL

The Board of Directors has recommended 140% Cash Dividend for the year ended June 30, 2024. Date of AGM: 11.01.2025, Time: 11:00 AM, Venue: Digital Platform. Record Date: 03.12.2024. The Company has also reported EPS of Tk. 41.59, NAV per share of Tk. 231.56 and NOCFPS of Tk. 63.82 for the year ended June 30, 2024 as against Tk. 35.58, Tk. 203.46 and Tk. (51.99) respectively for the year ended June 30, 2023.

(Q1 Un-audited): EPS was Tk. 12.67 for July-September 2024 as against Tk. 9.24 for July-September 2023; NOCFPS was Tk. 10.85 for July-September 2024 as against Tk. (5.38) for July-September 2023. NAV per share was Tk. 244.23 as on September 30, 2024 and Tk. 231.56 as on June 30, 2024.

KOHINOOR

The Board of Directors has recommended 50% Cash and 10% Stock Dividend for the year ended June 30, 2024. Date of AGM: 17.12.2024, Time: 3:00 PM, Venue: Digital Platform. Record Date: 28.11.2024. The Company has also reported EPS of Tk. 15.12, NAV per share of Tk. 60.35 and NOCFPS of Tk. 28.67 for the year ended June 30, 2024 as against Tk. 11.19 (restated), Tk. 54.05 (restated) and Tk. (27.64) (restated) respectively for the year ended June 30, 2023.

ESQUIRENT

Refer to their earlier news disseminated on 27.10.2024, the company has informed that some mistakes occurred in their consolidated audited financial statements. The company has reported Consolidated EPS of Tk. 0.41 instead of Tk. 0.39, Consolidated NAV per share of Tk. 65.19 instead of Tk. 65.17 (with revaluation reserve), Consolidated NAV per share of Tk. 37.47 instead of Tk. 37.45 (without revaluation reserve) and Consolidated NOCFPS of Tk. (9.67) instead of Tk. (9.46) for the year ended June 30, 2024.

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
MLDYEING	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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