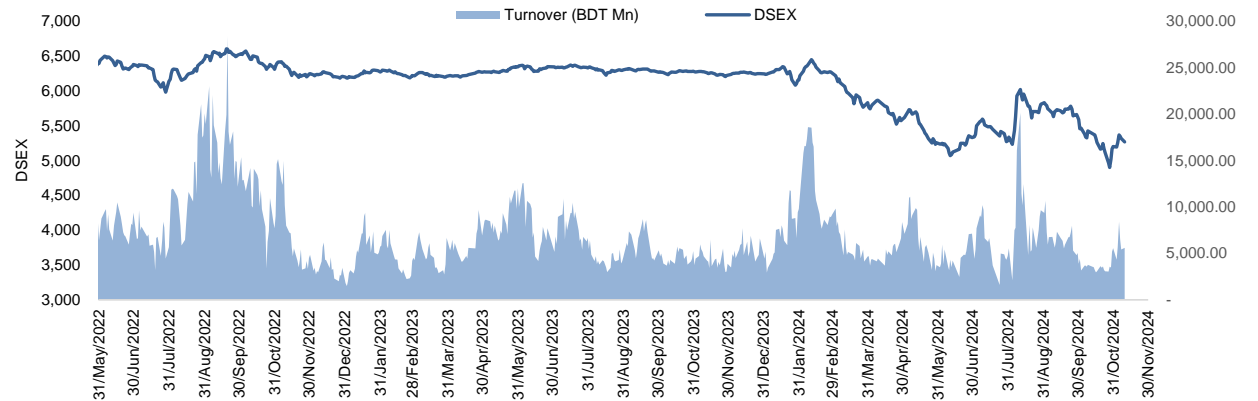


## Daily Market Update

The market closed in red today. The benchmark index DSEX (-0.95%) lost 50.49 points and closed at 5,265.85. The blue-chip index DS30 (-0.60%), the Shariah-based index DSES (-1.04%), and the large-cap index CDSET (-0.81%) closed at 1,953.68, 1,175.51, and 1,081.69 points, respectively. All the large-cap sectors posted negative performance today. NBF1 experienced the highest loss of 3.31% followed by Engineering (-2.57%), Pharmaceutical (-1.23%), Telecommunication (-1.16%), Bank (-1.04%), Fuel & Power (-0.58%), and Food & Allied (-0.57%), respectively. Block trades contributed 21.2% of the overall market turnover. Bangladesh Shipping Corporation (+6.7%) was the most traded share with a turnover of BDT 217 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,265.85	5,316.33	-50.49	-0.95%	-15.7%
DS30	1,953.68	1,965.54	-11.86	-0.60%	-6.7%
DSES	1,175.51	1,187.91	-12.40	-1.04%	-13.8%
CDSET	1,081.69	1,090.55	-8.86	-0.81%	-10.1%

	Advanced	Declined	Unchanged	Total
All Category	63	292	39	394
A Category (Equity)	37	173	19	229
B Category (Equity)	15	62	5	82
N Category (Equity)	0	4	0	4
Z Category (Equity)	11	53	15	79
Mutual Funds	3	28	6	37
Corporate Bonds	0	1	1	2
Treasury Bonds	0	0	0	0

\* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,680,680	6,718,100	-0.6%
	Mn USD	55,672	55,984	
Turnover	Mn BDT	5,597	5,416	
	Mn USD	47	45	+3.3%
Volume	Mn Shares	218	187	+16.3%
	No. of Trade	154,631	174,271	-11.3%

\* Average Interbank Exchange Rate is BDT 120.00 as of Nov 10, 2024

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Figure: Sectorial Turnover (BDT Mn)

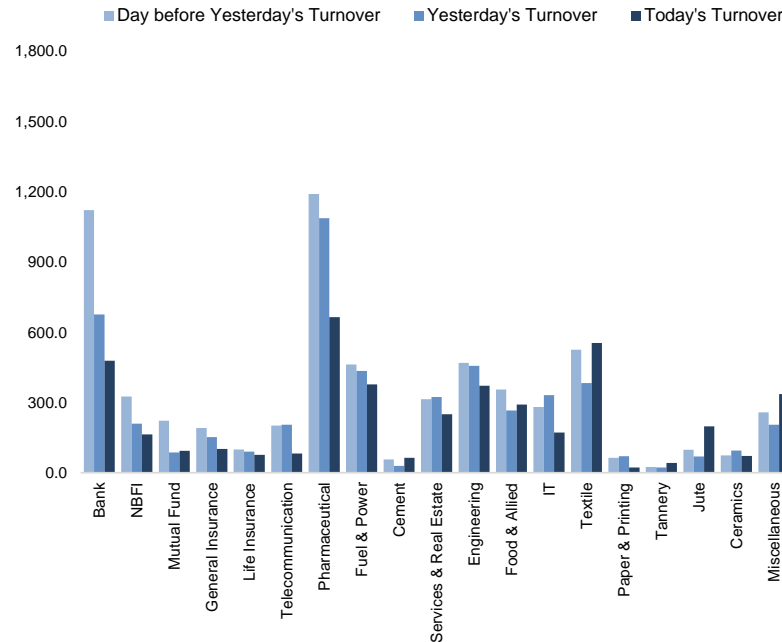
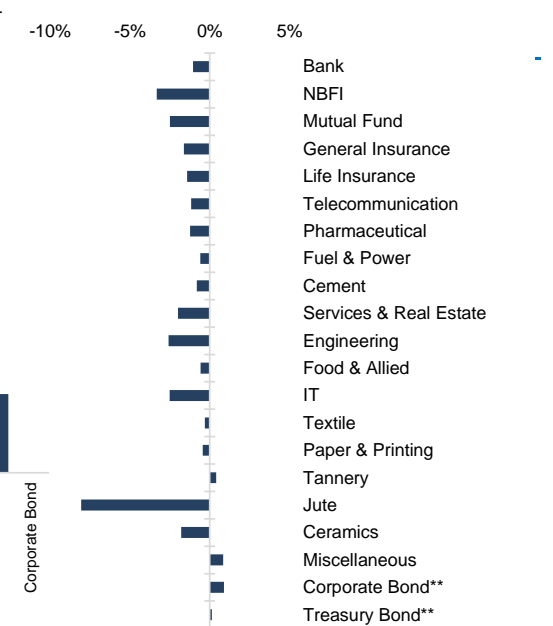


Figure: Sectorial Mcap Change



Market PE 15.4x  
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	1,458	1,474	-15.28	-1.04%	36	698,564	10.5%	477.9	10.8%	8.9x	0.7x	GP	429,800	11.8%	49.2	12.1x	7.4x
NBFI	1,238	1,281	-42.41	-3.31%	23	119,887	1.8%	163.8	3.7%	NM	NM	BATBC	199,530	5.5%	30.3	11.4x	3.2x
Mutual Fund	605	621	-15.42	-2.48%	37	28,281	0.4%	93.6	2.1%	NM	0.5x	SQURPHARMA	196,349	5.4%	21.5	9.4x	1.6x
General Insurance	2,592	2,635	-42.66	-1.62%	43	75,091	1.1%	102.0	2.3%	13.6x	1.1x	WALTONHIL	153,403	4.2%	20.0	11.3x	1.3x
Life Insurance	1,862	1,889	-26.60	-1.41%	15	49,503	0.7%	76.0	1.7%	NM	NM	ROBI	137,758	3.8%	28.5	25.0x	2.1x
Telecommunication	5,091	5,151	-59.96	-1.16%	3	589,479	8.8%	82.2	1.9%	13.9x	4.2x	BEXIMCO	103,842	2.8%	0.2	NM	1.2x
Pharmaceutical	2,980	3,017	-36.98	-1.23%	34	565,507	8.5%	664.4	15.1%	13.9x	1.6x	ISLAMIBANK	90,803	2.5%	102.1	19.4x	1.2x
Fuel & Power	1,156	1,163	-6.78	-0.58%	23	304,376	4.6%	377.2	8.6%	16.8x	0.6x	BRACBANK	90,255	2.5%	46.3	8.1x	1.2x
Cement	2,069	2,086	-16.72	-0.80%	7	98,810	1.5%	63.6	1.4%	16.3x	2.1x	BERGERPBL	81,931	2.2%	0.0	24.6x	5.2x
Services & Real Estate	1,128	1,151	-22.78	-1.98%	9	62,356	0.9%	250.2	5.7%	19.4x	0.4x	RENATA	75,883	2.1%	4.9	21.0x	2.2x
Engineering	2,503	2,569	-66.12	-2.57%	42	289,145	4.3%	371.9	8.4%	13.0x	0.9x	MARICO	73,250	2.0%	1.6	13.8x	9.6x
Food & Allied	17,103	17,202	-98.33	-0.57%	21	314,014	4.7%	290.7	6.6%	16.8x	4.5x	LHB	65,734	1.8%	29.9	16.3x	3.2x
IT	2,082	2,135	-53.44	-2.50%	11	27,388	0.4%	171.7	3.9%	18.9x	1.8x	ICB	56,198	1.5%	35.2	NM	1.3x
Textile	1,113	1,116	-3.33	-0.30%	58	115,454	1.7%	554.3	12.6%	NM	0.8x	UNILEVERCL	50,055	1.4%	1.2	68.1x	21.3x
Paper & Printing	4,394	4,413	-18.99	-0.43%	6	20,160	0.3%	22.0	0.5%	35.3x	0.9x	DUTCHBANGL	41,656	1.1%	2.1	6.7x	0.8x
Tannery	1,996	1,988	+7.93	+0.40%	6	22,159	0.3%	41.8	0.9%	61.8x	1.6x	BXPHARMA	36,893	1.0%	67.7	6.3x	0.8x
Jute	16,420	17,856	-1435.99	-8.04%	3	3,848	0.1%	197.9	4.5%	NM	NM	POWERGRID	36,004	1.0%	3.3	NM	0.2x
Ceramics	376	383	-6.82	-1.78%	5	16,700	0.2%	71.5	1.6%	NM	1.0x	EBL	32,731	0.9%	5.7	5.0x	0.8x
Miscellaneous	4,205	4,170	+34.83	+0.84%	15	229,113	3.4%	335.7	7.6%	38.0x	1.7x	PUBALIBANK	31,581	0.9%	5.7	3.3x	0.6x
Corporate Bond**	10,742	10,646	+95.80	+0.90%	16	34,919	0.5%	0.1	0.0%	NM	NM	OLYMPIC	30,391	0.8%	8.3	16.6x	2.9x
Treasury Bond**	453	452	+0.59	+0.13%	236	3,015,459	45.1%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KBPPWBIL	155.2	+9.6%	96.9	NM	13.1x
SPCL	43.0	+9.4%	72.2	18.6x	1.1x
LEGACYFOOT	52.7	+9.3%	30.5	NM	4.7x
BEACHHATCH	90.4	+7.9%	122.5	46.8x	7.2x
PRAGATILIF	154.9	+7.7%	17.0	NM	NM
ETL	11.1	+6.73%	51.6	19.1x	0.9x
BSC	96.0	+6.7%	216.6	5.1x	1x
BAYLEASING	8.0	+5.3%	2.4	NM	2.3x
JMISMDL	139.8	+4.8%	4.1	NM	1.6x
TOSRIFA	22.6	+4.6%	7.3	31.0x	0.7x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
PREMIERCEM	57.4	-9.9%	24.2	8.6x	0.9x
SONALIANS	302.0	-8.7%	197.2	35.2x	5x
ORIONINFU	311.9	-7.7%	82.7	NM	20.9x
BPPL	11.5	-7.3%	11.3	32.9x	0.4x
ACTIVEFINE	8.2	-6.8%	3.2	NM	0.4x
FUWANGFOOD	14.0	-6.7%	34.5	NM	5.7x
MEGHNAINS	20.2	-6.5%	1.2	17.4x	1.4x
CLICL	31.8	-6.5%	5.3	NM	NM
NAVANAPHAR	48.1	-6.4%	25.4	12.8x	1.1x
SILVAPHL	10.4	-6.3%	2.7	NM	0.6x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.4x	1.6x
BEXIMCO	69,460	5.1%	NM	1.2x
BATBC	45,948	3.4%	11.4x	3.2x
RENATA	35,002	2.6%	21.0x	2.2x
ISLAMIBANK	33,649	2.5%	19.4x	1.2x
BXPHARMA	32,479	2.4%	6.3x	0.8x
BRACBANK	32,157	2.4%	8.1x	1.2x
GP	30,004	2.2%	12.1x	7.4x
LHB	24,690	1.8%	16.3x	3.2x
EBL	24,199	1.8%	5.0x	0.8x
PUBALIBANK	20,448	1.5%	3.3x	0.6x
NBL	16,930	1.2%	NM	2.8x
CITYBANK	16,830	1.2%	4.0x	0.7x
BSRMLTD	14,210	1.0%	5.1x	0.5x
ALARABANK	13,534	1.0%	13.7x	1.0x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	16.6x	2.9x
UTTARABANK	11,350	0.8%	7.6x	0.7x
ORIONPHARM	11,317	0.8%	9.8x	0.5x
ROBI	10,738	0.8%	25.0x	2.1x

\* 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
BSC	96.0	+6.7%	216.6	5.1x	0.9x
SONALIANS	302.0	-8.7%	197.2	35.2x	4.5x
FEKDIL	21.0	+0.5%	161.2	12.8x	1.0x
ORIONPHARM	43.1	-5.3%	125.7	9.8x	0.5x
BEACHHATCH	90.4	+7.9%	122.5	46.8x	7.2x
ISLAMIBANK	56.4	-2.1%	102.1	19.4x	1.2x
UNIQUEHRL	50.7	+0.6%	99.9	9.9x	0.6x
KBPPWBIL	155.2	+9.6%	96.9	NM	13.1x
ORIONINFU	311.9	-7.7%	82.7	NM	20.9x
AFTABAUTO	37.2	-4.1%	78.0	NM	0.7x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
UNITEDFIN	13.7	13.7	13.0	60,967	835.25
BXPHARMA	81.8	81.7	2.0	2,000	163.50
BEACHHATCH	87.0	79.0	19.0	558	45.29
MJLBD	94.5	94.5	8.0	293	27.72
KBPPWBIL	142.1	135.0	22.0	186	26.08
AIL	100.0	99.1	3.0	177	17.66
PRAGATILIF	150.5	144.9	3.0	64	9.34
RENATA	710.1	710.1	2.0	10	7.08
SINGERBD	129.8	129.2	2.0	47	6.10
AL-HAJTEX	114.0	114.0	1.0	47	5.36

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
UNITEDFIN	13.7	13.7	835.3	60,967	13
BXPHARMA	81.8	81.7	163.5	2,000	2
BEACHHATCH	87.0	79.0	45.3	558	19
MJLBD	94.5	94.5	27.7	293	8
KBPPWBIL	142.1	135.0	26.1	186	22
AIL	100.0	99.1	17.7	177	3
PRAGATILIF	150.5	144.9	9.3	64	3
RENATA	710.1	710.1	7.1	10	2
SINGERBD	129.8	129.2	6.1	47	2
AL-HAJTEX	114.0	114.0	5.4	47	1
LANKABAFIN	21.2	21.2	4.2	200	1
SUMITPOWER	17.0	17.0	4.1	240	2
MIDLANDBNK	33.2	33.2	4.0	120	2
BATBC	391.5	380.0	3.9	10	2
UPGDCL	144.0	137.0	3.9	28	3
RELIANCE1	19.0	19.0	3.8	200	3
IDLC	37.0	37.0	3.1	84	3
IDLC	37.0	37.0	3.1	84	3
DACCADYE	13.6	13.4	3.0	223	2
EIL	52.5	52.5	2.4	45	1
SUNLIFEINS	62.0	53.2	1.4	24	2
MONNOAGML	435.0	435.0	1.1	3	1
<b>Total</b>			<b>1,188.2</b>		<b>109</b>

**Upcoming Corporate Events**

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
HAKKANIPUL		0.0%	2%	Record Date	14-Nov-24
BBSCABLES		0.0%	1%	Record Date	14-Nov-24
ITC		0.0%	11%	Record Date	14-Nov-24
TILIL		0.0%	5%	Record Date	14-Nov-24
NAHEEACP		0.0%	4%	Record Date	14-Nov-24
INDEXAGRO		0.0%	25%	Record Date	14-Nov-24

**Important DSE News**
**MALEKSPIN**

**(Q1 Un-audited):** Consolidated EPS was Tk. 1.73 for July-September 2024 as against Tk. 1.90 for July-September 2023; Consolidated NOCFPS was Tk. 0.18 for July-September 2024 as against Tk. 2.29 for July-September 2023. Consolidated NAV per share was Tk. 55.47 as on September 30, 2024 and Tk. 53.74 as on June 30, 2024.

**RAHIMTEXT**

**(Q1 Un-audited):** EPS was Tk. 0.22 for July-September 2024 as against Tk. 0.12 for July-September 2023; NOCFPS was Tk. 0.33 for July-September 2024 as against Tk. 0.52 for July-September 2023. NAV per share was Tk. 25.04 as on September 30, 2024 and Tk. 24.82 as on June 30, 2024.

**BARKAPOWER**

The Board of Directors has recommended 3.50% Cash Dividend for the year ended June 30, 2024. Date of AGM: 26.12.2024, Time: 5:45 PM, Venue: Hybrid System in combination of Digital and Physical presence at Hotel Royal Mark (3rd Floor), 102, Azadi, Mirboxtola, Sylhet-3100. Record Date: 01.12.2024. The Company has also reported consolidated EPS of Tk. 1.12, consolidated NAV per share of Tk. 22.61 and consolidated NOCFPS of Tk. 1.95 for the year ended June 30, 2024 as against Tk. 0.56, Tk. 21.99 and Tk. (0.11) respectively for the year ended June 30, 2023.

**PREMIERCEM**

**(Q1 Un-audited):** Consolidated EPS was Tk. 0.14 for July-September 2024 as against Tk. 0.54 for July-September 2023; Consolidated NOCFPS was Tk. 2.96 for July-September 2024 as against Tk. 2.90 for July-September 2023. Consolidated NAV per share was Tk. 65.50 as on September 30, 2024 and Tk. 65.37 as on June 30, 2024.

**BPPL**

The Board of Directors has recommended 2.00% Cash Dividend for the year ended June 30, 2024. Date of AGM: 26.12.2024, Time: 3:00 PM, Venue: Hybrid System in combination of Digital and Physical presence at Hotel Royal Mark (3rd Floor), 102, Azadi, Mirboxtola, Sylhet-3100. Record Date: 01.12.2024. The Company has also reported consolidated EPS of Tk. 0.35, consolidated NAV per share of Tk. 26.52 and consolidated NOCFPS of Tk. 3.85 for the year ended June 30, 2024 as against Tk. (1.06), Tk. 26.81 and Tk. 22.54 respectively for the year ended June 30, 2023.

**APEXSPINN**

**(Q1 Un-audited):** EPS was Tk. 0.96 for July-September 2024 as against Tk. 0.89 for July-September 2023; NOCFPS was Tk. 6.13 for July-September 2024 as against Tk. 7.00 for July-September 2023. NAV per share was Tk. 63.44 as on September 30, 2024 and Tk. 63.01 as on June 30, 2024.

**MONNOCERA**

The Board of Directors has recommended 1% cash dividend to public shareholders other than Sponsors and/or Directors for the year ended June 30, 2024. The Sponsors and/or Directors hold 14,120,200 shares out of total 37,724,317 shares of the Company and the cash dividend payable to public/others shareholders who hold 23,604,117 shares is Tk. 2,360,411.70 (Including Tax). Date of AGM: 28.12.2024, Time: 12:00 PM, Venue: Digital Platform. Record Date: 01.12.2024. The Company has also reported EPS of Tk. 0.39, NAV per share of Tk. 79.99 and NOCFPS of Tk. (0.17) for the year ended June 30, 2024 as against Tk. 2.91, Tk. 80.29 and Tk. (2.96) respectively for the year ended June 30, 2023.

**APEXFOODS**

**(Q1 Un-audited):** EPS was Tk. 2.20 for July-September 2024 as against Tk. 2.25 for July-September 2023; NOCFPS was Tk. (12.19) for July-September 2024 as against Tk. (31.28) for July-September 2023. NAV per share was Tk. 131.77 as on September 30, 2024 and Tk. 127.82 as on June 30, 2024.

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**MONNOAGML**

The Board of Directors has recommended 25% Stock Dividend for the year ended June 30, 2024 subject to the approval of BSEC. Date of AGM: 28.12.2024, Time: 11:00 AM, Venue: Virtually by using Digital Platform. Record Date: 01.12.2024. The Company has also reported Diluted EPS of Tk. 2.15, Diluted NAV per share of Tk. 134.03 and Diluted NOCFPS of Tk. 0.50 for the year ended June 30, 2024 as against Tk. 2.19, Tk. 132.11 and Tk. (2.36) respectively for the year ended June 30, 2023.

**BSCPLC**

**(Q1 Un-audited):** Basic EPS was Tk. 2.83 for July-September 2024 as against Tk. 3.88 for July-September 2023; Diluted EPS was Tk. 2.57 for July-September 2024 as against Tk. 3.22 for July-September 2023; NOCFPS was Tk. 1.91 for July-September 2024 as against Tk. 5.23 for July-September 2023. NAV per share was Tk. 94.60 as on September 30, 2024 and Tk. 93.06 as on June 30, 2024.

**ENVOYTEX**

**(Q1 Un-audited):** Diluted EPS was Tk. 1.51 for July-September 2024 as against Tk. 0.65 for July-September 2023; NOCFPS was Tk. 0.48 for July-September 2024 as against Tk. (0.57) for July-September 2023. NAV per share was Tk. 53.44 as on September 30, 2024 and Tk. 51.93 as on June 30, 2024.

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