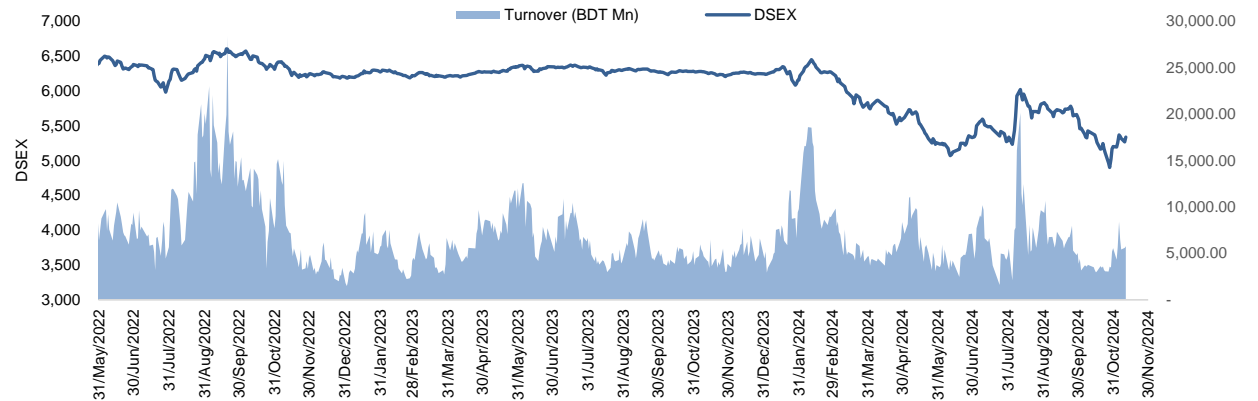


Daily Market Update

The market closed in green today. The benchmark index DSEX (+1.28%) gained 67.58 points and closed at 5,333.42. The blue-chip index DS30 (+1.22%), the Shariah-based index DSES (+1.68%), and the large-cap index CDSET (+1.49%) closed at 1,977.45, 1,195.29, and 1,097.84 points, respectively. Most of the large-cap sectors posted positive performance today. NBFi booked the highest gain of 2.64% followed by Telecommunication (+2.17%), Bank (+1.20%), Food & Allied (+1.08%), Pharmaceutical (+1.08%), Engineering (+0.87%), and Fuel & Power (-0.31%), respectively. Block trades contributed 20.5% of the overall market turnover. Bangladesh Shipping Corporation (+5.4%) was the most traded share with a turnover of BDT 300 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,333.42	5,265.85	+67.58	+1.28%	-14.6%
DS30	1,977.45	1,953.68	+23.77	+1.22%	-5.6%
DSES	1,195.29	1,175.51	+19.78	+1.68%	-12.4%
CDSET	1,097.84	1,081.69	+16.15	+1.49%	-8.7%

Figure: Sectorial Turnover (BDT Mn)

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

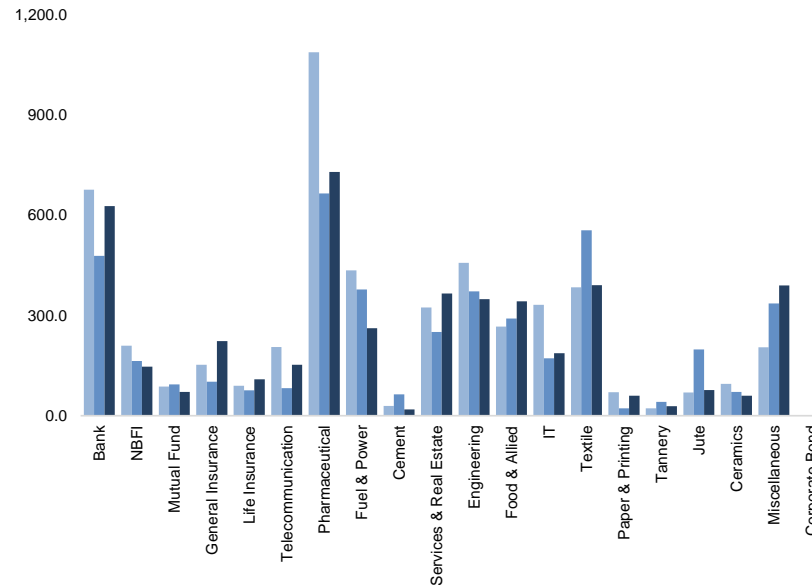
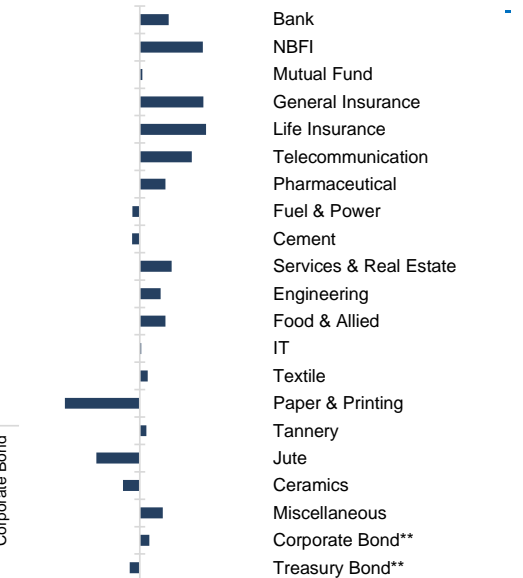


Figure: Sectorial Mcap Change

-5% 0% 5%



Market PE 15.4x
Market PB 1.2x

	Advanced	Declined	Unchanged	Total
All Category	198	133	64	395
A Category (Equity)	124	72	33	229
B Category (Equity)	36	32	13	81
N Category (Equity)	4	0	0	4
Z Category (Equity)	34	29	18	81
Mutual Funds	9	8	20	37
Corporate Bonds	0	2	0	2
Treasury Bonds	0	0	0	0

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,709,512	6,680,680	+0.4%
	Mn USD	55,913	55,672	
Turnover	Mn BDT	5,766	5,597	
	Mn USD	48	47	+3.0%
Volume	Mn Shares	181	218	-16.7%
	No. of Trade	155,085	154,631	+0.3%

* Average Interbank Exchange Rate is BDT 120.00 as of Nov 11, 2024

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* 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	1,494	1,476	+17.76	+1.20%	36	706,967	10.5%	626.8	13.7%	9.0x	0.7x	GP	439,658	11.9%	113.2	12.4x	7.6x
NBFI	1,291	1,258	+33.17	+2.64%	23	123,048	1.8%	146.5	3.2%	NM	NM	BATBC	202,554	5.5%	39.0	11.5x	3.3x
Mutual Fund	616	615	+0.64	+0.10%	37	28,310	0.4%	71.1	1.6%	NM	0.5x	SQURPHARMA	197,147	5.3%	52.7	9.4x	1.6x
General Insurance	2,700	2,630	+69.70	+2.65%	43	77,081	1.1%	223.2	4.9%	14.0x	1.2x	WALTONHIL	155,948	4.2%	9.9	11.5x	1.4x
Life Insurance	1,913	1,861	+51.53	+2.77%	15	50,874	0.8%	109.0	2.4%	NM	NM	ROBI	140,377	3.8%	34.8	25.5x	2.1x
Telecommunication	5,136	5,027	+109.11	+2.17%	3	602,273	9.0%	152.1	3.3%	14.2x	4.3x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,015	2,983	+32.11	+1.08%	34	571,594	8.5%	728.9	15.9%	14.1x	1.6x	ISLAMIBANK	97,082	2.6%	171.1	20.8x	1.3x
Fuel & Power	1,146	1,150	-3.58	-0.31%	23	303,427	4.5%	261.9	5.7%	16.8x	0.6x	BRACBANK	90,609	2.5%	66.4	8.2x	1.2x
Cement	2,067	2,073	-6.61	-0.32%	7	98,495	1.5%	19.2	0.4%	17.1x	2.1x	BERGERPBL	82,627	2.2%	0.2	24.8x	5.2x
Services & Real Estate	1,149	1,134	+15.04	+1.33%	9	63,184	0.9%	365.5	8.0%	21.8x	0.5x	RENATA	76,113	2.1%	5.9	21.0x	2.2x
Engineering	2,586	2,563	+22.36	+0.87%	42	291,668	4.3%	348.2	7.6%	13.1x	0.9x	MARICO	73,927	2.0%	5.6	13.9x	9.7x
Food & Allied	17,347	17,162	+184.79	+1.08%	21	317,396	4.7%	341.8	7.5%	17.0x	4.5x	LHB	65,734	1.8%	0.0	16.3x	3.2x
IT	2,078	2,076	+1.37	+0.07%	11	27,406	0.4%	186.7	4.1%	18.9x	1.8x	ICB	58,106	1.6%	15.1	NM	1.4x
Textile	1,116	1,112	+3.67	+0.33%	58	115,835	1.7%	390.5	8.5%	NM	0.8x	UNILEVERCL	50,246	1.4%	0.5	68.4x	21.4x
Paper & Printing	4,323	4,462	-139.35	-3.12%	6	19,530	0.3%	59.6	1.3%	36.5x	0.9x	DUTCHBANGL	41,568	1.1%	1.4	6.7x	0.8x
Tannery	1,994	1,989	+5.49	+0.28%	6	22,220	0.3%	28.9	0.6%	62.0x	1.6x	BXPHARMA	37,384	1.0%	98.7	6.4x	0.8x
Jute	17,162	17,480	-317.81	-1.82%	3	3,778	0.1%	77.0	1.7%	NM	NM	POWERGRID	36,644	1.0%	3.4	NM	0.2x
Ceramics	370	372	-2.63	-0.71%	5	16,582	0.2%	59.9	1.3%	NM	1.0x	EBL	32,460	0.9%	14.0	5.0x	0.7x
Miscellaneous	4,259	4,219	+40.30	+0.96%	15	231,302	3.4%	389.3	8.5%	38.4x	1.8x	PUBALIBANK	31,697	0.9%	4.8	3.3x	0.6x
Corporate Bond**	10,676	10,634	+41.78	+0.39%	16	34,738	0.5%	0.0	0.0%	NM	NM	BEACONPHAR	31,070	0.8%	37.8	60.6x	4.8x
Treasury Bond**	450	452	-1.93	-0.43%	236	3,003,345	44.8%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SONARBAINS	27.5	+10.0%	4.3	NM	1.3x
RUNNERAUTO	31.3	+9.8%	7.3	NM	0.5x
SHEPHERD	14.9	+9.6%	25.2	NM	1.1x
SICL	23.5	+9.3%	13.9	NM	1.3x
PRAGATILIF	168.5	+8.8%	41.2	NM	NM
LOVELLO	85.9	+7.87%	117.9	46.8x	6.6x
CRYSTALINS	55.6	+7.5%	68.3	17.6x	2x
MEGHNAINS	21.7	+7.4%	1.2	18.7x	1.5x
PARAMOUNT	37.7	+7.4%	9.2	15.3x	1.4x
ISLAMIBANK	60.3	+6.9%	171.1	20.8x	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
MONOSPOOL	125.7	-11.6%	13.2	42.2x	3.0x
STYLECRAFT	41.2	-8.4%	0.9	NM	7x
UNIONINS	24.9	-6.7%	8.5	40.2x	1.3x
AMBEEPFA	741.8	-6.1%	9.4	NM	60.5x
KAY&QUE	237.6	-6.0%	34.0	92.8x	2.6x
ARAMITCEM	12.7	-5.9%	0.3	NM	NM
SPCL	40.5	-5.8%	46.8	17.5x	1.1x
DESCO	19.3	-5.4%	0.8	NM	0.5x
EPGL	14.1	-5.4%	4.8	NM	0.3x
SEAPEARL	33.4	-5.1%	74.3	NM	1.9x

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%	11.5x	3.3x
RENATA	35,002	2.6%	21.0x	2.2x
ISLAMIBANK	33,649	2.5%	20.8x	1.3x
BXPHARMA	32,479	2.4%	6.4x	0.8x
BRACBANK	32,157	2.4%	8.2x	1.2x
GP	30,004	2.2%	12.4x	7.6x
LHB	24,690	1.8%	16.3x	3.2x
EBL	24,199	1.8%	5.0x	0.7x
PUBALIBANK	20,448	1.5%	3.3x	0.6x
NBL	16,930	1.2%	NM	2.9x
CITYBANK	16,830	1.2%	4.1x	0.7x
BSRMLTD	14,210	1.0%	5.1x	0.5x
ALARABANK	13,534	1.0%	13.6x	1.0x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	16.4x	2.8x
UTTARABANK	11,350	0.8%	7.6x	0.7x
ORIONPHARM	11,317	0.8%	10.2x	0.5x
ROBI	10,738	0.8%	25.5x	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	101.2	+5.4%	299.8	5.3x	0.9x
ISLAMIBANK	60.3	+6.9%	171.1	20.8x	1.3x
ORIONPHARM	44.9	+4.2%	140.4	10.2x	0.5x
UNIQUEHRL	51.2	+1.0%	129.9	10.0x	0.6x
LOVELLO	85.9	+7.9%	117.9	46.8x	6.6x
FEKDIL	20.8	-1.0%	114.1	12.7x	1.0x
GP	325.6	+2.3%	113.2	12.4x	7.6x
BXPHARMA	83.8	+1.3%	98.7	6.4x	0.8x
OIMEX	26.3	-0.4%	98.1	33.7x	7.5x
AGNISYSL	32.9	-0.6%	95.0	30.7x	2.0x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
UNITEDINS	35.5	35.5	18.0	23,691	841.03
BXPHARMA	82.0	82.0	1.0	2,000	164.00
UNITEDFIN	14.3	14.3	10.0	4,360	62.36
BEACHHATCH	87.1	84.0	8.0	232	19.93
LOVELLO	87.5	72.7	10.0	212	17.36
SAIHAMCOT	13.6	13.6	1.0	900	12.24
UPGDCL	143.4	143.4	1.0	83	11.83
SUMITPOWER	16.0	16.0	1.0	550	8.80
1STPRIMFMF	37.8	36.2	7.0	216	8.06
BRACBANK	50.5	50.5	1.0	120	6.06

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
UNITEDINS	35.5	35.5	841.0	23,691	18
BXPHARMA	82.0	82.0	164.0	2,000	1
UNITEDFIN	14.3	14.3	62.4	4,360	10
BEACHHATCH	87.1	84.0	19.9	232	8
LOVELLO	87.5	72.7	17.4	212	10
SAIHAMCOT	13.6	13.6	12.2	900	1
UPGDCL	143.4	143.4	11.8	83	1
SUMITPOWER	16.0	16.0	8.8	550	1
1STPRIMFMF	37.8	36.2	8.1	216	7
BRACBANK	50.5	50.5	6.1	120	1
AIL	99.8	85.1	6.0	66	3
SKTRIMS	14.1	14.1	4.2	301	1
AGNISYSL	35.1	35.1	3.5	100	1
BSC	105.0	105.0	2.8	27	1
PRAGATILIF	155.0	155.0	2.4	15	1
ORIONPHARM	46.9	46.9	1.9	41	2
GEMINISEA	203.0	203.0	1.0	5	1
GEMINISEA	203.0	203.0	1.0	5	1
BEXIMCO	104.1	104.1	0.9	9	1
RUPALILIFE	90.4	90.4	0.9	10	1
ITC	36.2	36.2	0.7	20	1
SAIHAMTEX	15.0	15.0	0.7	46	1
Total			1,179.5		76

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
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
BBS		0.0%	1%	Record Date	14-Nov-24
ADNTEL		0.0%	10%	Record Date	17-Nov-24

Important DSE News
AMBEEPFA

The Board of Directors has recommended 10% Cash Dividend for the year ended June 30, 2024. Date of AGM: 24.12.2024, Time: 11:00 AM, Venue: Online/Digital Platform; 184/1, Tejgaon Industrial Area, Dhaka-1208. Record Date: 02.12.2024. The Company has also reported EPS of Tk. 4.03, NAV per share of Tk. 12.26 and NOCFPS of Tk. (27.47) for the year ended June 30, 2024 as against Tk. 3.79, Tk. 9.73 and Tk. (14.68) respectively for the year ended June 30, 2023.

ECABLES

The Board of Directors has recommended 2% cash dividend for the year ended June 30, 2024. Date of AGM: 08.02.2025, Time: 11:00 AM, Venue: Hybrid System, Eastern Cables Limited, Uttar Patenga, Chattogram. Record Date: 17.12.2024. The Company has reported EPS of Tk. 0.59, NAV per share of Tk. 344.63 and NOCFPS of Tk. 5.66 for the year ended June 30, 2024 as against Tk. 0.49, Tk. 344.34 and Tk. (1.46) respectively for the year ended June 30, 2023.

CROWNCEMNT

(Q1 Un-audited): EPS was Tk. 0.25 for July-September 2024 as against Tk. 2.32 for July-September 2023; NOCFPS was Tk. 6.90 for July-September 2024 as against Tk. 0.93 for July-September 2023. NAV per share was Tk. 57.25 as on September 30, 2024 and Tk. 56.99 as on June 30, 2024.

MONOSPOOL

The Board of Directors has recommended 12% Cash Dividend for the year ended June 30, 2024. Date of AGM: 26.12.2024, Time: 11:00 AM, Venue: Hybrid System with venue of the AGM at The Atrium Restaurant, 50 & 52 Progoti Sharani, Block-J, Baridhara, Dhaka-1212. Record Date: 01.12.2024. The Company has also reported Basic EPS of Tk. 2.98, Diluted EPS of Tk. 2.98, Basic NAV per share of Tk. 42.49, Diluted NAV per share of Tk. 42.49 and Basic NOCFPS of Tk. 0.20, Diluted NOCFPS of Tk. 0.20 for the year ended June 30, 2024 as against Tk. 8.27, Tk. 2.28, Tk. 52.17, Tk. 14.36, Tk. (19.62) and Tk. (5.04) respectively for the year ended June 30, 2023.

FINEFOODS

The Board of Directors has recommended 10% Cash dividend only for General Shareholders other than Sponsors/Directors of the company for the year ended June 30, 2024. The Sponsors/Directors hold 21,32,072 shares out of the total 1,39,73,918 shares of the Company and Cash Dividend payable to only the General Shareholders is Tk. 118,41,846.00. Date of AGM: 27.12.2024, Time: 11:45 AM, Venue: Hybrid System at Registered Office (Project-1) U.P- 4no. Chandpur, P.O- Manikkhali, Thana- Katiadi Dist- Kishoregonj, Bangladesh. Record Date: 01.12.2024. The Company has also reported EPS of Tk. 0.88, NAV per share of Tk. 11.31 and NOCFPS of Tk. 0.15 for the year ended June 30, 2024 as against Tk. 0.07, Tk. 10.55 and Tk. (0.35) respectively for the year ended June 30, 2023.

SEAPEARL

(Q1 Un-audited): EPS was Tk. (1.05) for July-September 2024 as against Tk. 1.62 for July-September 2023; NOCFPS was Tk. 0.40 for July-September 2024 as against Tk. 3.69 for July-September 2023. NAV per share was Tk. 17.34 as on September 30, 2024 and Tk. 18.49 as on June 30, 2024.

ATLASBANG

The Board of Directors has recommended No Dividend for the year ended June 30, 2024. Date of AGM: 24.12.2024, Time: 11:00 AM, Venue: ABL Factory Premises and Digital Platform (Hybrid System). Record Date: 01.12.2024. The Company has also reported EPS of Tk. (2.01), NAV per share of Tk. 114 and NOCFPS of Tk. 0.71 for the year ended June 30, 2024 as against Tk. (2.93), Tk. 116 and Tk. (1.54) respectively for the year ended June 30, 2023.

ZAHEENSPIN

(Q1 Un-audited): EPS was Tk. (0.07) for July-September 2024 as against Tk. (0.08) for July-September 2023; NOCFPS was Tk. 0.01 for July-September 2024 as against Tk. (0.07) for July-September 2023. NAV per share was Tk. 3.89 as on September 30, 2024 and Tk. 3.96 as on June 30, 2024.

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ZAHENSIN

(Q1 Un-audited): EPS was Tk. (0.07) for July-September 2024 as against Tk. (0.08) for July-September 2023; NOCFPS was Tk. 0.01 for July-September 2024 as against Tk. (0.07) for July-September 2023. NAV per share was Tk. 3.89 as on September 30, 2024 and Tk. 3.96 as on June 30, 2024.

PAPERPROC

The Board of Directors has recommended 14% Cash Dividend for the year ended June 30, 2024. Date of AGM: 26.12.2024, Time: 12:00 PM, Venue: Hybrid System with venue of the AGM at The Atrium Restaurant, 50 & 52 Progoti Sharani, Block-J, Baridhara, Dhaka-1212. Record Date: 01.12.2024. The Company has also reported Basic EPS of Tk. 2.52, Diluted EPS of Tk. 2.52, Basic NAV per share of Tk. 72.59, Diluted NAV per share of Tk. 72.59 and Basic NOCFPS of Tk. 1.27, Diluted NOCFPS of Tk. 1.27 for the year ended June 30, 2024 as against Tk. 4.71, Tk. 1.66, Tk. 35.50, Tk. 12.53, Tk. (2.98) and Tk. (1.05) respectively for the year ended June 30, 2023.

ECABLES

(Q1 Un-audited): EPS was Tk. (1.44) for July-September 2024 as against Tk. (0.45) for July-September 2023; NOCFPS was Tk. (1.88) for July-September 2024 as against Tk. 2.52 for July-September 2023. NAV per share was Tk. 343.21 as on September 30, 2024 and Tk. 344.65 as on June 30, 2024.

FASFIN

The Board of Directors has recommended No Dividend for the year ended December 31, 2023. Date of AGM: 24.12.2024, Time: 11:00 AM, Venue: Through Hybrid System. Record Date: 01.12.2024. The Company has also reported consolidated EPS of Tk. (19.37), consolidated NAV per share of Tk. (105.42) and consolidated NOCFPS of Tk. (3.64) for the year ended December 31, 2023 as against Tk. (47.84), Tk. (86.14) and Tk. (5.57) respectively for the year ended December 31, 2022.

ATLASBANG

(Q1 Un-audited): EPS was Tk. (0.25) for July-September 2024 as against Tk. (0.61) for July-September 2023; NOCFPS was Tk. (0.99) for July-September 2024 as against Tk. 0.02 for July-September 2023. NAV per share was Tk. 114 as on September 30, 2024 and Tk. 114 as on June 30, 2024. Reasons for deviation: The government of Bangladesh, in response to world economic crisis suspended the purchase of vehicles by the governmental, semi-governmental, autonomous and other organization.

UNITEDINS

Referring to BSEC's letter no. SEC/SRIC/94-136/Part-3/246 dated November 10, 2024, The Allynugger Tea Co. Ltd., a corporate director of the company, has expressed its intention to sell its entire holding of 2,595,764 shares of the Company at prevailing market price (In the Block Market) through Dhaka Stock Exchange PLC. within next 30 working days.

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